

ECONOMIC IMPACT OF

FLORIDA'S GREEN INDUSTRY



FARM CREDIT

OF CENTRAL FLORIDA

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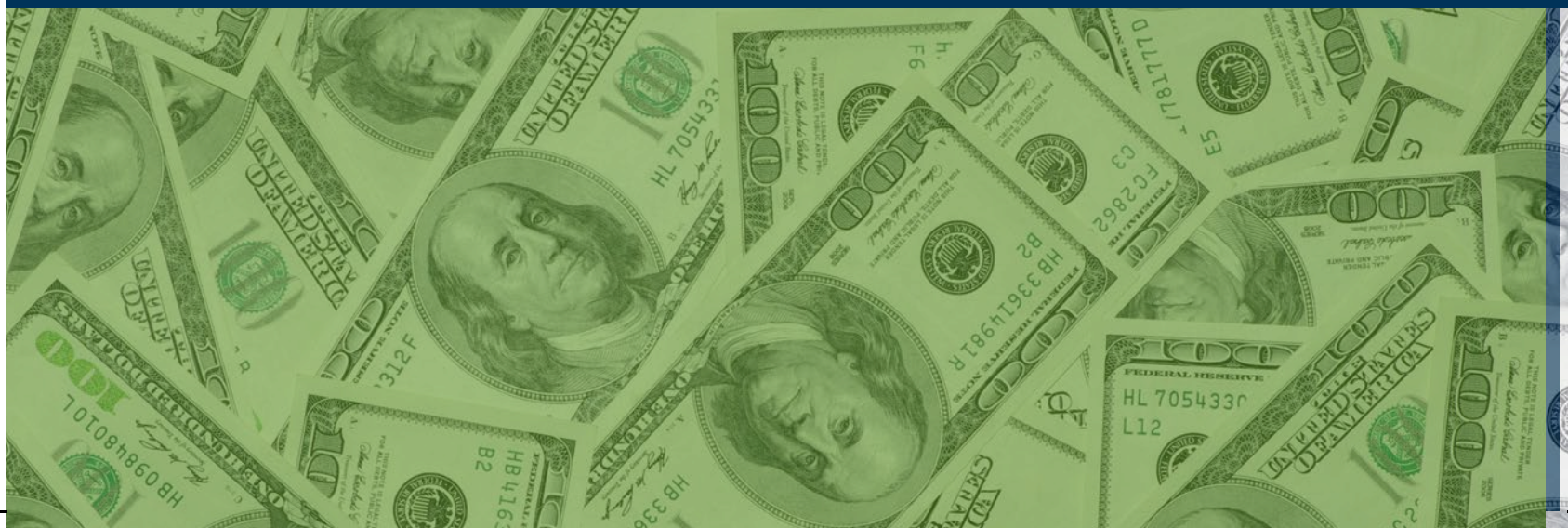
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FLORIDA NURSERY, GROWERS
AND LANDSCAPE ASSOCIATION

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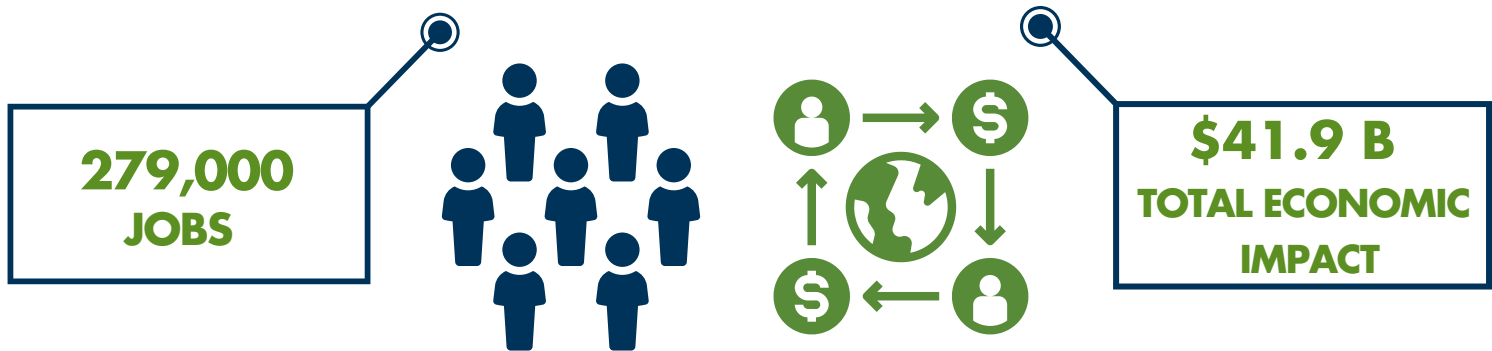
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INTRODUCTION & SUMMARY

The Sunshine State’s green industry continues its remarkable pace of growth. For 2023, the most recent year with available, comprehensive data, the various lawn service, garden, and nursery sectors directly and indirectly were responsible for **more than 279,000 jobs** (an increase of 4.8% from [the last study](#)). Labor income (all earnings derived from work, including wages, salaries, commissions, bonuses, and tips) related to the industry was nearly \$14 billion, up 21.2% from 2020. Value added, a correlate of Gross Domestic Product (GDP), increased by 48% (\$7.9 billion), contributing to a total economic impact both directly and indirectly of **\$41.9 BILLION**.



TOTAL ECONOMIC IMPACT (INCLUDING INDIRECT AND INDUCED CONTRIBUTIONS IN \$M)

Year	Employment	Labor Income	Value Added	Output
2015	232,648	\$8,748	\$13,172	\$21,080
2018	247,113	\$9,856	\$15,052	\$25,447
2020	266,385	\$11,348	\$16,378	\$31,366
2023	279,041	\$13,759	\$24,234	\$41,865

Employment, labor income, value added, and output aggregates including both direct and indirect contributions from the green industry are necessary in order to gauge total economic impact. For example, direct employment for nursery would include front-line workers in greenhouses across the state, while indirect employment would include their business or discretionary income supporting jobs at the food trucks parked walking distance from their place of work, local printing or embroidering shops supporting landscape service uniforms, or delivery drivers picking up from florists. Thus, while it is important to consider the direct employment, wages, and GDP additions that the green industry provides to the Sunshine State, the total economic impact must be defined as including indirect, spillover effects that benefit the entire overarching economy.



EMPLOYMENT

While total employment economic impact for the green industry across the state of Florida rose 4.8% from 2020, it is up nearly 20% since the first economic impact study was conducted in 2015. This is largely driven by rising totals in the **landscape services sector, with the number of workers therein rising by nearly 30,000 since 2011**. Though the Sunshine State comprises a little less than 7% of the US population, it has been the second most popular state for housing construction in recent years (after Texas) – averaging more than 12% of total housing units built nationwide each of the last five years. Florida’s population rose an estimated 1.83 million (net) between the first pandemic lockdowns and July of 2024. This growth in population has initiated upticks in new housing units (the total includes homes, apartments, townhouses, etc.) and population, driving the need for lawn care. As the total number of people grows in the state thousands of new businesses are created, also requiring well-manicured exteriors. Landscape management is necessary infrastructure, an absence of which leads to blight and in opposition to Florida’s burgeoning pro-growth, pro-development, pro-business trends.

**IN THE LANDSCAPE SERVICES
SECTOR THE NUMBER OF
WORKERS HAS
RISEN BY NEARLY**

30,000



INCREASE OF

8,116 JOBS

**IN THE NURSERY
PRODUCTION SECTOR**



Besides residential and business needs, a growing and aging state has expanded its healthcare facilities, places of worship, and even cemetery capacity – all of which drive demand for outdoor care. **Increases in the nursery production sector have been less pronounced in total but still impressive, up more than 43% since 2011, an increase of 8,116 jobs.** This rise is a testament not only to the success of the nursery industry, but also its expansion. After the initial housing crisis of the late 2000s, jobs in the nursery industry contracted temporarily but have been on an upward trajectory since 2013. This expansion becomes more noteworthy as automation in watering, herbicide/pesticide application, harvesting, and even packing has picked up speed in the industry. Strong employment growth recently at the same time as rising efficiencies in automation are clear evidence of a robust and still growing sector. Job growth in lawn and garden supplies stores are a correlate to the growing population, and also a renewed interest in personal plant/yard care, while the boost to florist and nursery wholesalers underpin that sector’s support for downstream firms reliant on their services.

FLORIDA’S GREEN INDUSTRY DIRECT CONTRIBUTION 2023

Industry	Employment	Labor Income
Greenhouse and Nursery Production	26,938	\$1,079,186,000
Lawn and Garden Equipment Manufacturing	179	\$10,092,000
Farm and Garden Equipment Merchant Wholesalers	3,549	\$274,896,000
Nursery and Florist Merchant Wholesalers	7,927	\$442,973,000
Lawn and Garden Equipment and Supplies Stores	9,418	\$384,929,000
Florists	3,314	\$111,992,000
Landscape Architectural Services	4,079	\$249,298,000
Landscaping Services (IMPLAN total)	122,324	\$5,072,269,765
TOTAL	177,728	\$7,625,635,765

LABOR INCOME

Florida’s nursery, landscape, and allied sectors contribute more than \$7.6 billion in direct wages and compensation for workers across the state and are responsible downstream for a total of almost \$13.8 billion. This income supports families, schools, realtors, restaurants, grocery stores, and every other type of business across the state (and, likely, even vacations outside of it). Attempting to parse out annual average salaries in the various sectors is outside the scope of this paper, primarily owing to the significant number of sole proprietors in the industry skewing the totals when blended with frontline workers. **Total wages paid in the industry have more than doubled** since the first study was conducted in 2015, underscoring not only the growth and success across sectors, but also a prioritizing of worker value and competitive compensation packages. A large portion of this increase, however, can also be attributed to rising inflation and cost of living, which has driven pay higher since the pandemic.



TOTAL WAGES PAID IN THE INDUSTRY HAVE MORE THAN DOUBLED

VALUED ADDED

The GDP contribution of the green industry to Florida’s economy continues to rise, up almost \$8 billion (48%) from the last study in 2020, and \$11 billion higher than the first study in 2015. It is important to note, however, that while this number is impressive, it has been fueled by a highly inflationary environment over the past three years. Higher input costs, higher wages, higher income, and of course, higher taxes, are all contributors to a rising GDP representation for the nursery, landscape, and allied industries. Regardless, a jump of nearly 50% in economic impact for the value-added side is astounding and lends further evidence to the robustness of the industry. Inflation and the pandemic alone are certainly not the sole reasons for growth in green industry GDP. Since 2011 total number of businesses across the various sectors have risen by more than 2,500, mostly in the landscape services sector. Wholesalers for both nursery and lawn/garden stores, lawn/garden equipment stores, and landscape architecture sectors have all experienced some growth in total firms as well. Though the total number of nurseries in the state has marginally declined over the past decade, total workers at those establishments has risen, evidence of minor consolidation coinciding with expansion. Overall, while some economic trends have bolstered GDP share for the green industry, much of it is also attributable to its phenomenal entrepreneurs starting a host of new businesses.

FLORIDA’S GREEN INDUSTRY: TOTAL NUMBER OF ESTABLISHMENTS

Year	Florists	Lawn & Garden Equipment Manufacturing	Farm & Garden Equipment Merchant Wholesalers	Nursery & Florist Merchant Wholesalers	Lawn & Garden Equipment & Supply Stores	Nursery & Floriculture Production	Landscape Architectural Services	Landscaping Services
2011	3,426	40	340	526	985	1,243	772	8,965
2012	3,554	38	332	527	962	1,212	767	9,092
2013	3,497	45	345	540	960	1,182	777	9,311
2014	3,560	55	341	542	940	1,155	802	9,430
2015	3,357	62	340	521	911	1,121	829	9,586
2016	3,175	60	340	514	889	1,099	879	9,758
2017	3,251	57	341	512	881	1,087	896	9,968
2018	3,288	52	354	505	878	1,108	851	10,362
2019	3,226	49	376	505	882	1,122	871	10,726
2020	2,900	49	381	501	904	1,102	887	11,009
2021	3,293	48	386	514	958	1,121	909	11,286
2022	3,512	45	391	535	1,066	1,099	900	11,370
2023	3,314	45	390	536	1,043	1,109	926	11,456

OUTPUT

In determining aggregate economic impact for an industry, output from direct and indirect contributions is the optimal measure. Output includes GDP, and also the intermediate inputs throughout the value streams of industry participants. For the green industry, this has more than doubled since the first study conducted in 2015. While immense, it should be clarified that this total is exponentiated by industry growth. As each contributing factor grows within an industry at the state level, total output can increase by a larger magnitude. With the Florida green industry, many of its effects remain in-state, especially both the services provided and wages for the landscape industry. While some nursery products are exported out of state, much of even wholesale nursery and florist suppliers' contribution to GDP stays within Florida, due to the industry's regional consolidation and vertical integration. The very nature of the florist, landscape, landscape architecture, and retail supply store sectors is a local focus, guaranteeing the majority of economic output contributed by them remains within the Sunshine State. As dollars stay nearby, they are recirculated into the metro economy and thus multiply the total output. It is true that rising inflation, wages, etc., and pandemic consumer spending has impacted the rise in economic output for the green industry, but, as aforementioned, the growth remains substantial notwithstanding.



NAICS	Environmental Horticulture Segment 2023 Industry	Direct Contributions (in \$M)		Total Economic Impact (Including Indirect and Induced Contributions in \$M)					
		Employment	Labor Income	Employment	Labor Income	Value Added	Output	County Taxes	State Taxes
1114	Greenhouse & Nursery Production	26,938	\$1,079	42,714	\$1,980	\$4,229	\$6,568	\$12	\$43
333112	Lawn & Garden Equipment Manufacturing	179	\$10	434	\$28	\$56	\$142	\$1	\$2
423820	Farm & Garden Equipment Merchant Wholesalers	3,549	\$275	7,854	\$533	\$888	\$1,518	\$16	\$44
42493	Nursery & Florist Merchant Wholesalers	7,927	\$443	17,722	\$1,034	\$2,205	\$3,787	\$63	\$167
4442	Lawn & Garden Equipment Supplies Stores	9,418	\$385	12,721	\$578	\$1,310	\$1,729	\$43	\$114
4531	Florists	3,314	\$112	4,736	\$193	\$288	\$497	\$7	\$17
54132	Landscape Architectural Services	4,079	\$249	6,835	\$420	\$604	\$1,000	\$5	\$14
56173	Landscaping Services	122,324	\$5,072	186,025	\$8,993	\$14,654	\$26,623	\$151	\$428
TOTAL		177,728	\$7,626	279,041	\$13,759	\$24,234	\$41,865	\$297	\$829

FLORIDA'S NURSERY AND GREENHOUSE SECTOR DIRECTLY EMPLOYS NEARLY 27,000 WORKERS



\$24 BILLION GDP SUPPORTED BY FLORIDA'S GREEN INDUSTRY



CONTRIBUTED ALMOST \$14 BILLION TO EMPLOYEE PAYCHECKS IN 2023



¹ This study utilizes IMPLAN, an economic analysis software and data application designed to estimate the contributions of an existing industry within a specified geographic region.
² Population figures from Census Bureau, State Population Totals and Components of Change: 2020-2024.
³ Employment and labor income totals from Bureau of Labor Statistics, Quarterly Census of Employment and Wages.
⁴ Economic impact results for 2015, 2018, and 2020 refer to previous studies conducted by Farm Credit of Central Florida and UF/IFAS.





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ABOUT OUR ECONOMIST

Stevan Novakovic holds an M.S. in Public Policy from Georgetown University with a focus in econometrics. Prior to joining Farm Credit of Central Florida he conducted economic research on agricultural commodities for IHS Markit (now by S&P Global), and also spent time in hedging/risk management, and commodities trading. His ties to the green industry stem from his first job and formative years on the nursery his grandfather founded – Florida Cactus Inc. in Apopka, FL. Stevan also earned an M.A. from Columbia University and undergraduate degrees from the Moore School of Business at the University of South Carolina, where he triple-majored in International Business, Global Supply Chain and Operations Management, and Finance with a minor in Russian.

ABOUT FARM CREDIT OF CENTRAL FLORIDA

Farm Credit of Central Florida is the local association for the region adjacent to the I-4 corridor and serves those in the following thirteen counties: Citrus, Hernando, Pasco, Pinellas, Hillsborough, Polk, Sumter, Lake, Osceola, Orange, Seminole, Volusia and Brevard. Farm Credit borrowers have long enjoyed the benefits of doing business with local offices, where people know their business, their community, and their market. We are headquartered in Lakeland and have brick and mortar locations in Apopka, Brooksville, and Plant City. Our affiliation is with AgFirst Farm Credit Bank in Columbia, South Carolina. Local service with national stability. We are Farm Credit.



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ABOUT FNGLA

Now, in its 7th decade of industry service, FNGLA represents seven industry divisions: Citrus Nurseries; Floriculture; Foliage; Garden Centers; Landscape Firms; Woody shrub and tree producers; and, Horticultural suppliers. As a vertically integrated association, FNGLA also fully represents and targets the needs of Florida's landscape design, contracting, irrigation and maintenance companies.

FNGLA produces two of the nation's largest nursery/landscape industry-only trade shows: the Tropical Plant International Expo (TPIE) and The Landscape Show (TLS). FNGLA also maintains a network of 14 Chapters geographically located throughout Florida, conducts industry advocacy in Tallahassee and Washington, D.C., and offers marketing, professional education, industry certifications to its members and the industry at-large.



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