The *Nursery* Papers

ESSENTIAL INFORMATION FOR AUSTRALIAN PROFESSIONAL NURSERY OPERATORS

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Lies, damned lies and statistics !

NIAA and HRDC have commissioned the Australian Bureau of Statistics (ABS) to conduct a special survey of the Australian Nursery Industry. Preliminary figures are now available about the size of the production or wholesale sector of industry for the 1996/97 financial year. These tables are not from the ABS but have been derived by the author from data supplied by them.

Table 1: Size of production industry by state in 1996/97

Location of businesses growing plant material	Number of production businesses*	Total area (m^2) of land used for growing plant material for sale	Total value of plant material sold (farm gate not retail)
NSW	1434	12,787,000	$166,580,000
Victoria	643	10,750,000	$166,533,000
Queensland	751	10,498,000	$112,506,000
SA	230	3,287,000	$38,885,000
WA	261	3,378,000	$36,525,000
Tasmania	114	1,627,000	$14,075,000
NT	20	240,000	$2,147,000
ACT	13	98,000	$2,442,000
AUSTRALIA	**3046**	**42,665,000 m^2**	**$539,691,000**

*(must have gross sales of more than $5,000 a year)

Figures like these are essential for individual business planning and for industry to negotiate with governments about major issues. We are reliant on members of industry to fill the ABS forms out as accurately as possible. It's become evident that the level of record keeping within industry is a major limitation to the collection of more accurate statistics. Unfortunately we are unable to supply tables for the retail sector at this time because of difficulties with interpretation of the collected information.

In Table 1 we can see that the NSW and Victorian industries sold a similar amount of product in 1996/97 but Victoria used less land to do so. New South Wales has the most growers. The areas under shadehouse and greenhouse in Table 2 as expected show a greater use of greenhouses in the cooler states and more shadehouses in the warmer states. This information should be very useful for allied traders involved in the supply of greenhouse and shadehouse coverings.

Table 2: Area of structures used for plant production, 1996/97

Location of businesses growing plant material	Area (m²) of shadehouse used for plant production	Area (m²) of greenhouse used for plant production
NSW	1,028,000	607,000
Victoria	667,000	688,000
Queensland	1,080,000	284,000
SA	153,000	221,000
WA	288,000	109,000
Tasmania	43,000	64,000
NT	29,000	3,000
ACT	13,000	13,000
AUSTRALIA	**3,302,000**	**1,989,000**

Table 3: Value of greenlife sales made to various market sectors by production nurseries in 1996/97

Market sectors	$ value of sales	% total sales
Home gardeners (via retail)	296,351,000	54.9
Landscapers	75,561,000	14.0
Production horticulture eg orchardists	51,415,000	9.5
Other nurseries for growing-on	51,241,000	9.5
Wholesale markets, cash & carry	38,815,000	7.2
Revegetation, Greening Australia etc.	26,309,000	4.9
TOTAL SALES	**539,691,000**	**100**

Growers should find the information in Tables 3 and 4 quite useful when considering changes to your product mix. If for instance you were considering getting involved in the production of fruit trees in large containers you can see that they only represent 1.3% of total industry sales. Gearing up to supply the landscape trade? Represents 14% of total sales, about a quarter of the home garden market. How significant is container size in sales of palms and ferns? 72% of all sales of 'palms and ferns' were made in containers from 76mm to 300mm in size and only 14% in large containers or bags.

Table 4: Sales of various greenlife products by category, as a percentage of total greenlife sales made by production nurseries in 1996/97.

Pots less than 76mm (diam)	%	Pots 76mm to 300mm	%
Bedding plants	**10.1**	Roses	**3.4**
Vegetables	**2.9**	Potted colour	**7.0**
Houseplants	**1.9**	Houseplants	**6.8**
Palms and Ferns	**0.7**	Palms and Ferns	**4.2**
Native trees and shrubs	**4.1**	Native trees and shrubs	**11.8**
Exotic trees and shrubs	**2.6**	Fruit trees and vines	**3.5**
Total	**22.3**	Other exotic trees & shrubs	**17.4**
		Total	**54.1**

Pots over 300mm and large bags	%	Other plant material	%
Houseplants	**0.4**	In ground / bare rooted	**6.9**
Palms and Ferns	**0.9**	Seeds	**1.7**
Native trees and shrubs	**2.2**	Bulbs	**2.3**
Fruit trees and vines	**1.3**	Miscellaneous	**5.4**
Other exotic trees & shrubs	**2.5**	**Total**	**16.3**
Total	**7.3**		

Undoubtedly there will be some debate about the accuracy of these figures. The bottom line is that we can only use the information you provide and the final figures reflect your record keeping and the effort devoted to filling out the forms accurately. It's likely that another survey will be conducted in 1999, partly so that significant industry trends can be identified.

Acknowledgments
The figures presented here are a result of the 'Nursery, Cut Flower, Florist, Hiring of Plants and Turf Statistics Survey 1997' (green form) conducted by the ABS in accordance with a NIAA/HRDC project. The compilation of tables was undertaken by Ian Atkinson, Industry Development Manager.