

# Greenlife in Urban Australia

## Greenlife in Australian Horticulture

The Greenlife Industry is the 'backbone of Australian horticulture contributing **16.5%** to the total value of Australian Horticulture<sup>8</sup>.

The value of greenlife production has grown **13%** over the last 5 years with **6%** growth in the twelve months to June 2020<sup>9</sup>.

The Greenlife Industry is the largest levy paying industry in the horticulture sector<sup>10</sup> contributing an annual average of **\$1.4 million** into research and development each year.

In 2019/20 industry businesses invested in new infrastructure (**60%**) and new technology (**37%**).

The industry significantly underpinning food, fibre and foliage plant production in Australia, encompassing the ornamental plant market, starter plants for fruit, nut and vegetable production and stock for landscape, forestry and revegetation.

Australian's value the greenlife industry. It is considered essential with research evidencing direct and positive impact on human health, environmental health, sustainability goals and economic wellbeing.

The industry is at the forefront of research and development with innovative programs and technology driving progress and helping to ensure the industry leads the way in sustainable plant production.



### Where do plants come from?

The Greenlife Industry is the source of most plants in Australia. The industry encompasses plant growers, growing media manufacturers, allied suppliers of plant nutrition and protection products, and greenlife retailers. This complex, diverse, integrated and dedicated collective, are responsible for providing the trees and plants that green and feed Australia.

Australians not only desire improved access to greenspaces<sup>1</sup>, greenlife is invaluable for its contribution to cooler cities, community health and wellbeing; improved productivity; water management; urban aesthetics, community connection; clean air and local commerce.



Trees reduce temperatures by up to **8 degrees Celsius**, reducing air conditioner use and carbon emissions by an estimated **12-15% per annum**<sup>2</sup>



Trees and plants act as a **natural water filtration system**, they **reduce run-off** and **reduce erosion**.



People working in a place with plants and trees are **17% more productive** than people working in bare spaces<sup>3</sup>.



Urban trees can help **improve air quality** for many different air pollutants in cities, and consequently can help **improve human health**<sup>5</sup>.



**74%** of Australians see green space as a place for **relaxation**<sup>4</sup>. **73%** see their garden as a sanctuary for **mental well-being** and **89%** believe access to green space is a **Human Right**.



Customers could pay **9-12% more** for goods sold in CBDs with **high quality tree canopy**<sup>6</sup>.



Greenlife supports urban biodiversity of threatened species with 25% of plants and 46% of animals, intersecting with cities<sup>7</sup>

# Australian Greenlife Industry



**\$2.6 Billion**

19/20 Farmgate value



**2.2 Billion**

plants in the environment



**1,651**

greenlife production businesses in operation



**25,000**

people employed in the industry



**6,278 Ha**

of outdoor production



**1,264 Ha**

of indoor production



**67% of growers**

invested in new business infrastructure and technology



**42% of growers**

are planning to expand in the next 5 years



Greenlife Industry Australia is the national peak industry body for businesses and organisations that provide products and services for greenlife production, produce, supply and retail greenlife and promote the benefits and share greenlife with the community.



## Greenlife Production Workforce

- 52% of the production workforce are in full time employment.
- Casuals accounts for 31% of the workforce.
- 88% of workers perform on-farm tasks related to the production of greenlife.
- 92% of businesses employ at least one tertiary qualified employee.



## Industry Demographics

- The average age of the industry is 54 with only 15% of employees being aged under 40.
- Women represent 47% of the workforce.
- The average wage in the industry is \$57,000.
- Only 24% of the workforce are tertiary qualified with 2019 data indicating that 17% of horticulturally trained.



## Greenlife Production

- 23% of production businesses are responsible for 76% of Australia's greenlife production.
- Production of ornamental greenlife makes up 65% of farmgate production<sup>1</sup>.
- The value of indoor plant production has increased 6% in the last twelve months.
- 83% of growers operate from the east coast of Australia.



## Greenlife Customers

- 62% of growers sell to plants to retailers and 49% sell to landscapers/developers which are the two largest supply channels.
- The three-year average of production businesses selling direct to consumers is 30%.
- Large corporate retailers account for 52% of greenlife purchased for retail supply.

## Priorities and challenges facing the greenlife industry

### Sustaining strong demand following demand surge

A dip in demand – uncertain how large - after the 'COVID high' is expected. 1 in 5 nursery business experienced a fall in sales due to COVID related disruption. Supply-side constraints around skilled labour and water security need to be resolved if demand is to be fully met.

### Attract, develop, maintain a productive workforce - The industry offers diverse and dynamic careers for life.

Currently around a quarter of employees in production nurseries have a tertiary qualification. Without a clear career progression agenda and a long-term industry-focused training and education pathway, this issue will remain a threat to the development of businesses and industry.

### Ensuring water security for business and industry

Drought, uncertain water restrictions and policy across Australia is a threat and barrier to the growth and development of the industry.

### Maintain and continue high standards of plant biosecurity

Exotic and endemic plant pest incursions cause significant, sudden and lasting damage to the industry. Early detection, eradication and management are a vital, continuous and costly effort.