



Greenlife Industry Australia

FACTS AT A GLANCE

THE AUSTRALIAN NURSERY INDUSTRY 2019-20

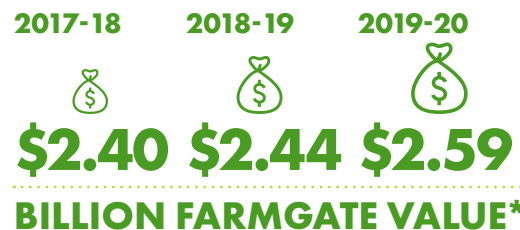
For the third straight year, the value and production of plants sold in Australia have continued to grow, reinforcing the nursery industry's position as one of the most valuable contributors to the Australian agriculture industry.

According to the *Nursery Industry Statistics 2019-20* report, the Australian nursery industry is currently valued at approximately \$2.6 billion and employs almost 25,000 people across 1,651 production businesses in every state and territory of Australia.

Australian growers produce a variety of greenlife, from ornamentals, trees and shrubs, to starter plants for fruit and vegetable production and stock for landscaping, forestry and revegetation.

COVID-19 has changed the way many Australians value and interact with greenlife in their lives, driving increased consumer demand for indoor plants and herbs.

With over 2.2 billion plants produced and sold across the country, the greenlife industry is the backbone of Australian horticulture. Plants have a direct and positive impact on the environment, Australian food production, and play a significant role in community health and well-being.



INDUSTRY SUCCESS

- **2.2 billion plants** were introduced into our communities, workplaces and homes, growing at 10% year on year
- **\$2.59 billion** in farm gate value, growing at 6% year on year
- **50%** plan to grow business over next five years
- **67%** of growers are investing in infrastructure, technology and training
- **37%** of growers are microbusinesses turning over <500k
- **31%** of growers turnover >\$2 million

DID YOU KNOW?

The industry has grown in both value and total production for three consecutive years

WORKFORCE & PRODUCTIVITY

- **23,880** employed as full time, part time or casual workers (19,701 FTE)
- **92%** businesses employ a qualified horticulturalist which makes up 24% of the workforce
- **34%** of turnover goes toward wages with the average wage estimated at \$57,210
- **\$441,000** turnover per hectare

DID YOU KNOW?

Focus on tertiary education has increased over the last three years, with qualified horticulturalist growing from representing 17% of the industry, to 24%

PRODUCTION (% of businesses producing)

- **62%** Perennials, trees and shrubs
- **31%** Propagation plants
- **26%** Indoor plants
- **23%** Fruit trees, nut trees and vines
- **16%** Bedding and potted colour
- **14%** Herbs and vegetables
- **11%** Other

DID YOU KNOW?

Plant Life Balance consumer marketing has supported increases in demand for indoor plants and herbs and vegetables at home during 2020

WANT TO KNOW MORE ABOUT HOW YOUR PRODUCTION NURSERY STACKS UP?

Check out the nursery industry business benchmarking tool to measure your performance against your peers. Find out more: <https://www.greenlifeindustry.com.au/about/projects-programs/greenlife-statistics-and-research>

The 'Nursery industry statistics 2017/18 to 2019/20' (NY17008) project has been funded by Hort Innovation, using the nursery industry research and development levy and contributions from the Australian Government.

Hort Innovation
Strategic levy investment

NURSERY FUND



Greenlife Industry Australia

GREENLIFE INDUSTRY MARKET ANALYSIS PROPELLING THE INDUSTRY FORWARD

To support strategic decision-making for the industry, a Market Analysis Report was developed by ACIL Allen as part of the Nursery Industry Statistics Project 2019-20 (NY17008).

The analysis pulls together insights from a range of stakeholders, including production and retail nurseries, government bodies, industry associations and Hort Innovation.

The research uncovered six key industry issues and provides insights into the barriers and drivers related to each.

The key drivers and barriers identified on this page will form the industry's medium and long-term strategy moving forward as it looks to shore up its sustainability and prosperity whilst employing thousands of Australians and contributing to healthy people, homes, urban spaces and the natural environment.

| DEMAND TRENDS | WATER AND CLIMATE |
|--|--|
| <ul style="list-style-type: none"> ■ Expected demand in the short-term remains high ■ Strong demand from COVID-19 boom, urban greening projects and green infrastructure ■ A dip in demand is likely following COVID-19 ■ Supply-side constraints around skilled labour, water security and technology need to be resolved if demand is to be fully met | <ul style="list-style-type: none"> ■ Continued investment in best management practice programs are improving water usage in the industry ■ An industry sustainability framework is in development to further support most efficient use of resources ■ Water security will always be an issue for all horticulture industries, especially the greenlife industry ■ Water security affects both supply (production) and demand (water restrictions) |
| PRODUCTIVE WORKFORCE | PLANT BIOSECURITY |
| <ul style="list-style-type: none"> ■ The level of tertiary education on the industry has grown consistently ■ There are several strategic levy-funded projects aimed at attracting, developing, and retaining talent ■ The industry experiences a 'brain drain' to other horticulture industries ■ It's imperative that tertiary education levels continue to grow | <ul style="list-style-type: none"> ■ Adoption of BioSecure HACCP practices is increasing in the industry ■ A dedicated team of plant protection officers are extending biosecurity measures nationally ■ As international and interstate trade continues growth, risks of pest incursions will also grow ■ The complexity and diversity of the industry adds further risk |
| GOVERNMENT SUPPORTS AND PROGRAMS | TECHNOLOGY |
| <ul style="list-style-type: none"> ■ The government has supported the industry well throughout the COVID-19 pandemic through support programs and recognition as an essential service ■ Dozens of government investment programs are benefitting the industry ■ There is still significant uncertainty in the economy ■ Information surrounding available grants and funding can be scarce | <ul style="list-style-type: none"> ■ Increasing use various emerging technologies such as digital systems, robotics and other kinds of productive technology ■ Over the last three years, the number of nurseries indicating planned investments in technology has increased ■ Investment in technology remains relatively low at 1% of revenue ■ Consistent investment in technology will be necessary to meet ongoing demand |

For more information, please consult the full report, available on the Greenlife Industry Australia website here: <https://www.greenlifeindustry.com.au/communications-centre/greenlife-market-analysis-2021>

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