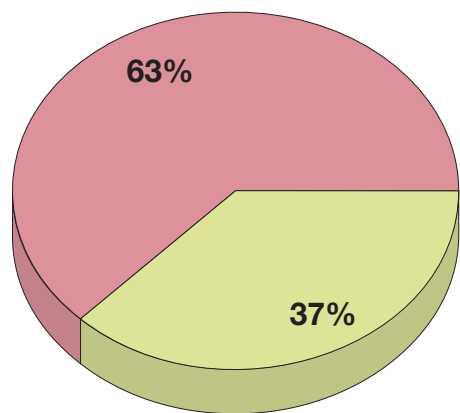


Consider Landscape Service Firm Sales...

This section of Arizona's Green Industry grew at a faster pace than any other sector. Between 1998 and 2002, sales grew by 38%.

Landscape Sales by Customer

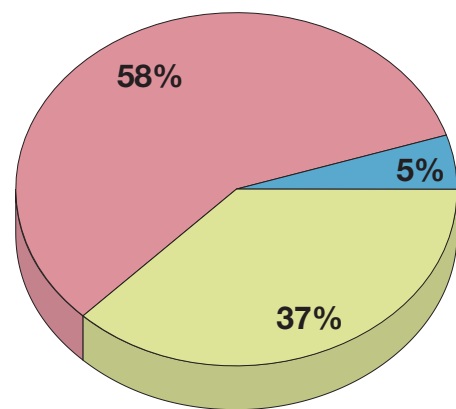


Landscape Service Firm Total Sales
\$735 million

Residential
Commercial/Municipalities

Landscape Sales by Category

Landscape Service Firm Installation Sales
\$426 million
Maintenance Sales
\$272 million



Landscape Design/Consultation
Landscape Installation
Landscape Maintenance

The Economic Impact of Arizona's Green Industry



Arizona's Green Industry - A Billion Dollar Industry

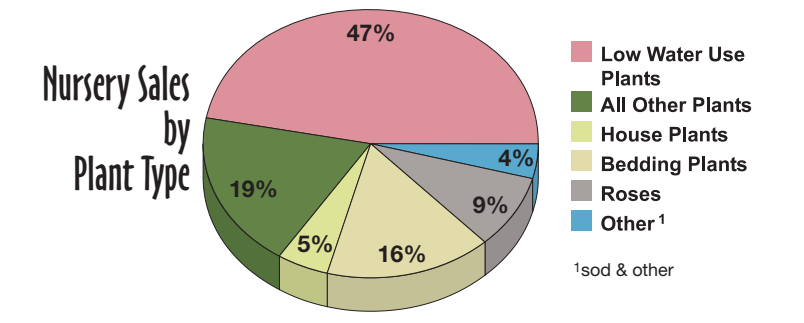
Consider Sales...

Sales continue to rise at an astounding pace. Between 1998 and 2002, Arizona's Green Industry grew 31%.

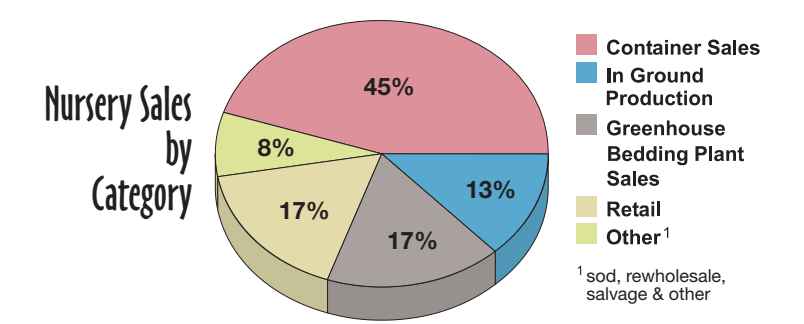
Total Green Industry Sales: \$1.2 billion

	1998	2002	% Increase
Nursery	\$415 million	\$501 million	+21%
Landscape Services	\$532 million	\$735 million	+38%
Total Green Industry	\$947 million	\$1.2 billion	+31%

Total Nursery Sales: \$501 million Low Water Use Plant Sales: \$235 million



Container Plant Sales: \$225 million



The Arizona Green Industry is...
Growers, landscape service firms and many other businesses working together.

2002 Industry Report

Compiled by
Arizona Agricultural Statistics Service
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Arizona Landscape Contractors Association
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Scottsdale, AZ 85250
judy@azlca.com



Consider Green Industry Employment ...

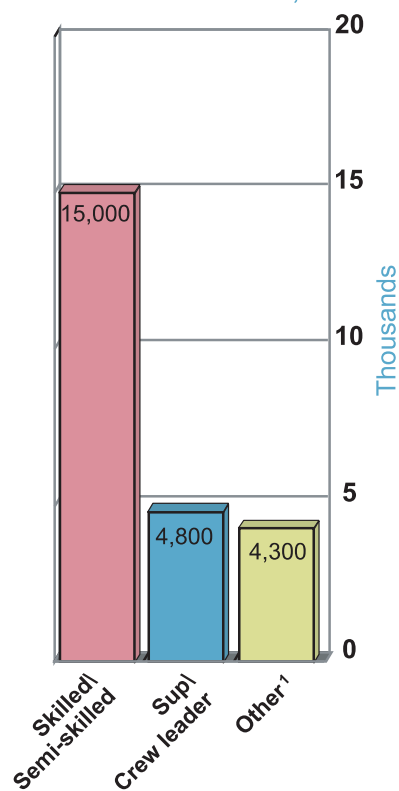
Between 1998 and 2002 Green Industry Employment grew by 24%. The largest increase was in the landscape services sector.

Green Industry Employment		
	1998	2002
Nursery	8,827	8,900
Landscape Services	10,618	15,200
Total Green Industry	19,445	24,100

Direct Employment in Arizona Green Industry: 24,100 hired workers

Green Industry Employment by Job Class

Total Labor = 24,100

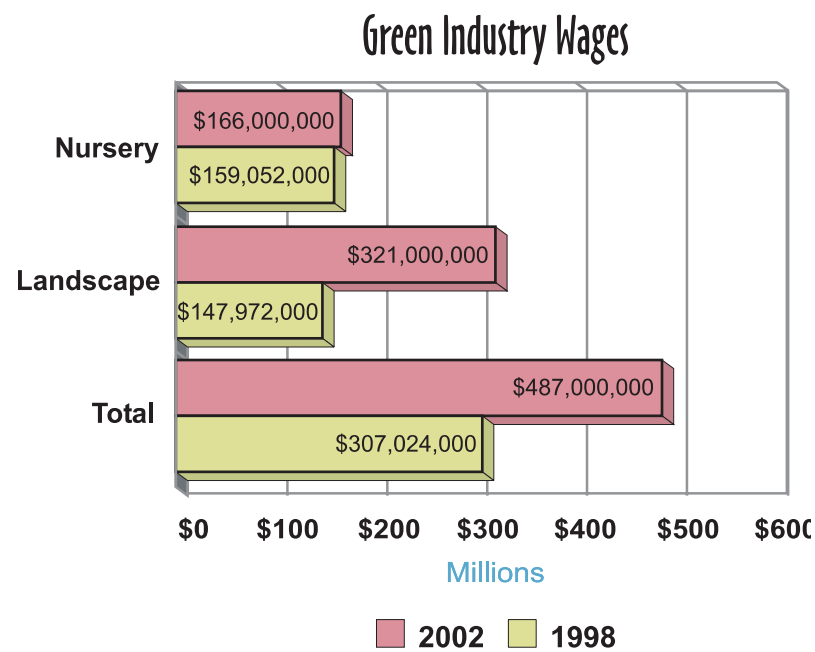


Number of Green Industry Jobs:
 Skilled/Semi-skilled 15,000
 Supervisors/Crew Leaders 4,800
 Other¹ 4,300
Total 24,100 hired workers

¹professional, managers, sales & clerical

Consider Wages and Benefits ...

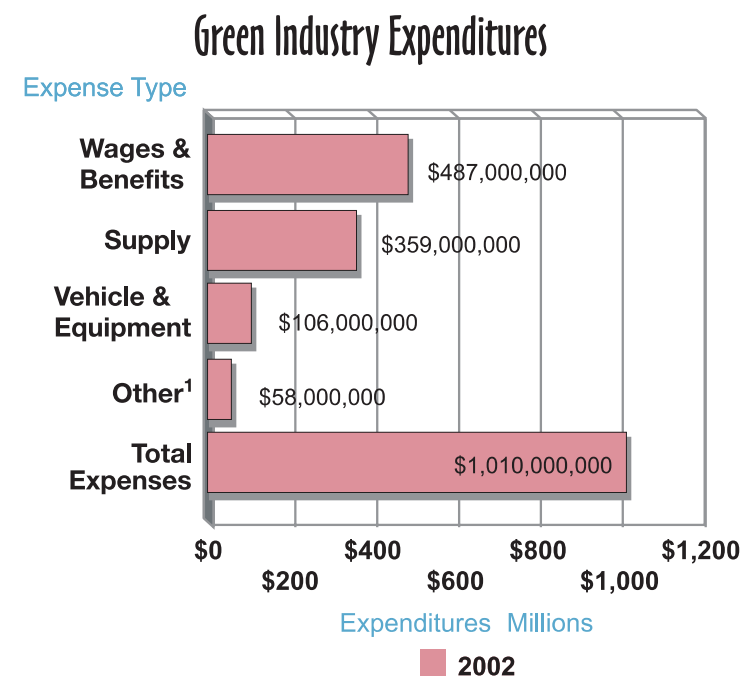
Wages and benefits paid by the Arizona Green Industry made a huge contribution to Arizona's economy. Between 1998 and 2002, paid wages grew by 59%. The average salary received by Green Industry workers rose by 28% over that same time period.



Total Green Industry Wages: \$487 million
Wages Paid to Landscape Service Workers: \$321 million
Nursery Workers: \$166 million

Consider Total Green Industry Expenditures ...

The Arizona Green Industry spent more than \$1 billion on wages, supplies, vehicles and equipment and other business expenses. Nursery producers and landscape service firms make a huge contribution to Arizona's economy.



¹utilities, facility maintenance & construction, mortgage & lease expenses, miscellaneous business expenses.

Total Green Industry Expenditures more than \$1 billion

Green Industry Expenditures

Expense Item	Total
Wages & Benefits	\$487 million
Plant Materials	\$225 million
Rock & Soil Amendments	\$55 million
Container and Greenhouse Supplies	\$25 million
Fertilizer & Chemicals	\$16 million
Irrigation & Other Supply expenses	\$38 million
Total Supply Expenses	\$359 million
Vehicle & Equipment Lease or Purchase Expense	\$57 million
Fuel, Motor Oil & Other Vehicle or Equipment Expense	\$49 million
Total Vehicle & Equipment Expense	\$106 million
Other Business Expense	\$58 million
Total Expenses (all categories)	more than \$1 billion