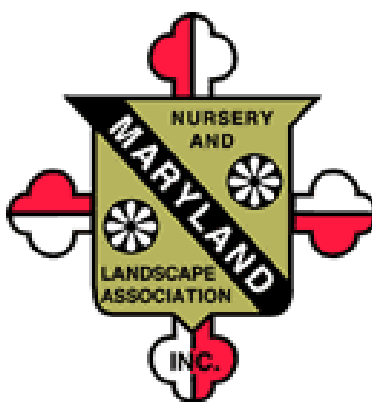


2007

Maryland Horticulture Industry Economic Profile

Sponsored by:

Maryland Nursery and Landscape Association



Completed by:

USDA – Maryland Agricultural Statistics Service

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United States Department of Agriculture



National Agricultural Statistics Service

Maryland



Department of Agriculture

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We wish to thank all members of the nursery community who responded to the survey and to express a special note of gratitude to Jim McWilliams, Vanessa Finney, John Peter Thompson, Ron Jayne, and George Mayo of the Maryland Nursery and Landscape Association for providing guidance throughout this project.

EXECUTIVE SUMMARY

The Horticulture Industry in Maryland

This, the third economic profile in the 1st decade of the new millennium, provides the most comprehensive insight into the growth and strength of the horticulture industry in Maryland. The first survey, in 2000, provided baseline of information from which many management and leadership decisions could be based. The 2003 survey demonstrated the impact a drought year can have on industry growth.

The 2007 survey is the most comprehensive to date for the following reasons. The survey reflects the use of improved methodology advances by the NASS which more accurately accounts for sales. An unprecedented response rate from chain stores, whose impact was not fully developed in previous surveys, reveals a more complete view of the industry. Finally, the prevalence of affordable dynamic small business management tools may have improved the business owners' ability to more accurately and conveniently access the information requested by the survey. The survey includes a response for expected sales in 2008. The 2007 survey predates one of the most significant economic recessions in our nation's history by just a few months. This global economic event will no doubt have affected the actual sales in 2008.

Here are a few highlights from the 2007 statistical profile:

- Gross receipts exceeded \$1.96 billion in 2007 and were expected to exceed \$2.05 billion in 2008
 - Retail sales accounted for 49%
 - Landscape Installation and Maintenance accounted for 27%
 - Wholesale sales accounted for 22%
 - Other categories accounted for 2% (\$35.94 million, impressive for 1%)
- Herbaceous Perennials topped product sales
 - Herbaceous Perennials 31% - \$496.8 million
 - Woody Plants 22% - \$352.5 million
 - Annuals 18% - \$288.4 million
 - Specialty Greenhouse Products 6% - \$96.1 million
 - Aquatics 5% - \$80.1 million
 - Christmas Trees 8% - \$128.2 million
 - Other products 10% - \$160.3 million
- Maryland wholesale sales generated over \$422 million
- Total area dedicated to nursery production and sales exceeds 20,800 acres, including 19 million square feet of covered (greenhouse) space.
- Over 18,500 people were employed by the industry
 - 59% are employed for over 150 days
 - Average wage rate for laborers was \$10.39/hr- well above federal minimum wage
- Factors Limiting Growth
 - Financial Resources/economy - a very important factor limiting growth
 - Labor - an important factor limiting growth
 - Competition - is also an important factor limiting growth

The conclusions stated in the survey demonstrate a modest profile of the "Green Industry" in Maryland. All of Maryland's annual and foliage plant producers are not included in the survey. Many landscape contractor "hardscape" activities are not included in the survey. And, the survey does not include the millions of dollars in economic activity generated by such events as the Mid-Atlantic Nursery Trade Show held in Baltimore each January.

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Maryland Horticulture – 2007

A Statistical Profile of the Horticulture Industry in Maryland

OBJECTIVE

The 2007 Maryland Horticulture Survey was conducted to measure the scope and impact of Maryland's horticultural industry. The survey quantifies the types of plants grown and sold in Maryland, the sources and destination of plant materials, the number of individuals employed in the industry, the tenure of operation, the value of land and equipment, and horticultural sales. This survey also identifies factors which may be impacting growth of the industry. One final objective was to provide a measure of change with the previous survey conducted in 2003.

SURVEY DESIGN

Survey Sample.¹ All licensed nursery operations in Maryland were included in the 2007 Horticulture Survey, for a total of 1,140 operations. This sample included 36 major chains, representing 860 of the licensed operations. Survey forms were sent to these 36 major chains and the remaining 1,104 licensed operations. Unlicensed businesses were not included in the survey. There were 28 major chain stores that reported, which represented 87 percent of the total outlet stores.

Any individual or business that grows or sells perennial plant material in Maryland must be licensed by the Maryland Department of Agriculture, Office of Plant Industries and Pest Management. This includes growers of plant materials, landscape contractors, retail sales operations, and plant brokers. No license is required for businesses that grow or import annual plants, interior plants, or tropical plants. This exemption includes cut-flower growers, orchards, flower shops, and turf growers; however, many of these operations chose to be licensed so that they could ship plants out of state.

What is a Horticultural Product? For the purpose of the 2007 Nursery Industry Survey, horticultural production included nursery plant production, brokerage services, landscape design, installation, maintenance, renovation, lawn care, fertilization, mowing, trimming, mulching, erosion control/hydroseeding, plant delivery, plant rentals, watering, irrigation, interior plant operations, tree work, tree moving, tree spraying, IPM, seeding, and sales of Christmas trees, floral greenery, and plugs. In the 2007 survey, planners decided also to include the sale of hardscape products and services related to hardscape installations.

The following items were not considered nursery items in the 2007 survey: gifts, Christmas shop sales, snow removal, lighting, consulting, drainage work, excavation, value added products, and sales of produce, mulch, soil, fertilizer and stone.

Data Collection. The data collection phase was preceded by survey publicity letters sent to all respondents and by advertisements in industry publications. Questionnaires were initially mailed to all potential survey respondents in early 2009 with a "second request" mailing in late spring. Non-respondents were telephoned; then a selected few surveys were visited in person, by field enumerators, for the final phase of data collection.

¹ Because of the nature of state licensing, many "Green Industry" producers and businesses are not included in this survey. Therefore, it is understood that the conclusions contained in this document offer an incomplete profile of the entire "Green Industry" in Maryland.

Data Analysis. Data were collected, compiled, analyzed, and summarized by the USDA – NASS - Maryland Field Office. Data were key entered using Viking software and analyzed using Statistical Analysis System (SAS) software. Survey responses were analyzed on a statewide and regional basis.

Estimation for Non-Response. Each sampled operation that did not respond was grouped into one of three categories based on type of operation (grower, landscaper, or retail sales) and into one of five categories based on size of operation (hobby, small, average, large, or colossal). Category designations were provided by nursery inspectors from the Maryland Department of Agriculture (MDA) based on their observations during inspection visits, and general knowledge of state horticulture operations that are licensed.

The assumption was made that responses received from completed questionnaires were representative of the population as a whole and that non-respondents would answer questions in a similar fashion. Therefore, if all or part of a questionnaire was left unanswered, it was assumed it was ‘typical’ of other operations with similar sales and type of business, and data were estimated accordingly.

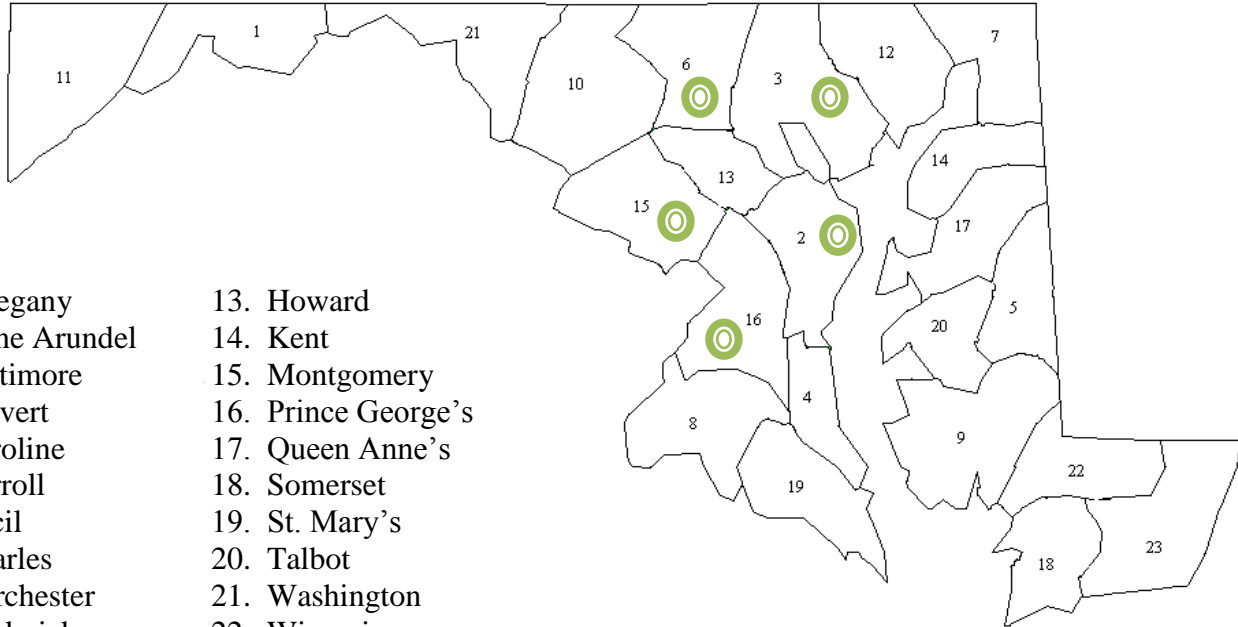
Special attention was given to large operations. These businesses were estimated individually using data from the 2007 Census of Agriculture, the USDA-NASS database, and the MDA nursery license application. If this information was unavailable, estimates were made by calculating averages from similar operations.

RESPONSE


Response to the 2007 Maryland Horticulture Survey was 72%. Non-response consisted of those who refused or were businesses that could not be contacted. Out of the 817 surveys that responded to the survey, 696 were currently in business, 57 were out of business, and 64 were out of scope for this survey, which included 18 research and government facilities.

RESPONSE

Of the total 817 respondents in business, the top five counties were Baltimore, Montgomery, Anne Arundel, Prince George's and Carroll.



- | | |
|-----------------|---------------------|
| 1. Allegany | 13. Howard |
| 2. Anne Arundel | 14. Kent |
| 3. Baltimore | 15. Montgomery |
| 4. Calvert | 16. Prince George's |
| 5. Caroline | 17. Queen Anne's |
| 6. Carroll | 18. Somerset |
| 7. Cecil | 19. St. Mary's |
| 8. Charles | 20. Talbot |
| 9. Dorchester | 21. Washington |
| 10. Frederick | 22. Wicomico |
| 11. Garrett | 23. Worcester |
| 12. Harford | |

 Top 5 Counties

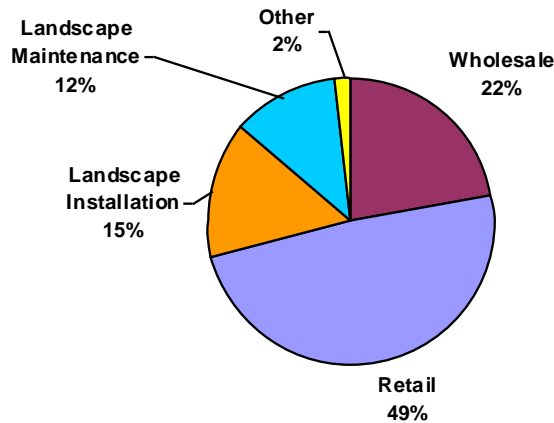
RESULTS AND SUMMARY OF THE SURVEY

Sales of Horticultural Products and Services

Total gross receipts for Maryland licensed horticultural operations were \$1.96 billion in 2007. The retail sales sector accounted for 49% of the total receipts with sales surpassing \$959 million. The total gross sales increased 88% compared to the 2003 survey. NASS made extraordinary efforts to make the 2007 Horticulture Survey the most comprehensive survey ever conducted. Analysis shows that some of the marked increase in sales is based on methodological advances that allowed NASS to more accurately account for sales. The 2007 survey saw an increase in the number of licensed nursery operations in business compared to 2003. The major boost in retail sales was driven by an increase in chain store outlets.

Overall, licensed nursery operations in Maryland reported they expect a 5% increase in total sales in 2008. The one sector with the largest anticipated increase was wholesale sales (9%) followed by retail sales (7%).

Sales by Business Function



Business Function	2007 Sales		Expected 2008 Sales		Percent Change 2007-2008
	Dollars	Percent	Dollars	Percent	
Wholesale sales ²	422,490,890	22%	458,954,805	22%	+ 9%
Retail sales ²	959,696,464	49%	1,031,382,766	50%	+ 7%
Landscape installation ²	301,939,923	15%	307,556,398	15%	+2%
Landscape maintenance	240,581,479	12%	225,541,359	11%	-6%
Other sales and products	35,940,096	2%	30,173,831	2%	-16%
Total	\$1,960,648,852	100%	\$2,053,609,159	100%	+ 5%

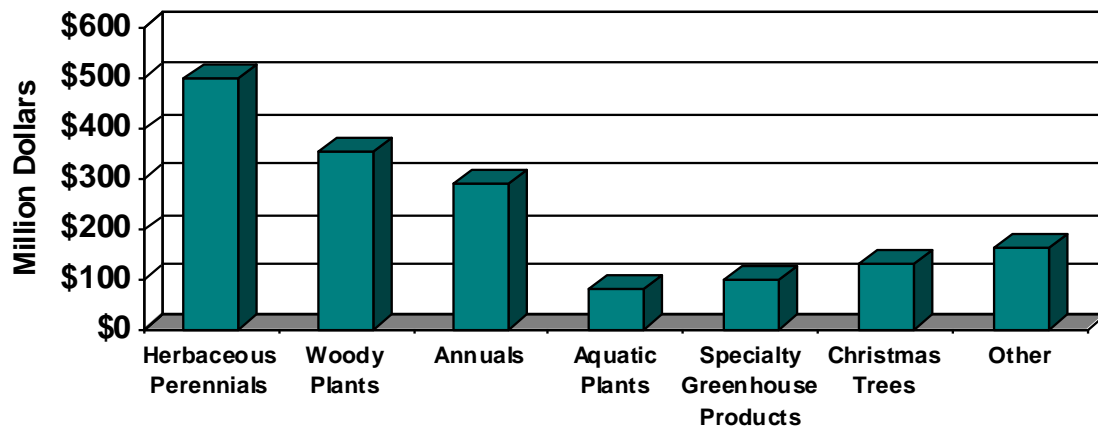
²Wholesale, retail, and landscape installation include sales for plant and hardscape products such as walkways, irrigation systems, decks, etc.

Types of Plants Sold

Revenue related to the sale, installation and maintenance of herbaceous perennials totaled \$497 million in 2007. This represented 31% of all plant-related sales and services by licensed horticulture operations. Sales of woody plants were second at \$353 million; 22% of all sales reported. Annual plant sales were next at \$288 million; 18% of all sales reported.

Based on survey results, Maryland licensed horticulture operations expected the largest growth in sales for 2008 to be in woody plants. This expected 9% increase far exceeded increases for other plant types and product and service categories.

Sales by Plant Type



Plant Type	2007 Sales		Expected 2008 Sales		Percent Change 2007-2008
	Dollars	Percent	Dollars	Percent	
Woody Plants	352,579,562	22%	\$382,634,619	23%	+ 9%
Herbaceous Perennials	496,816,655	31%	499,088,634	30%	+ <1%
Annuals	288,474,187	18%	299,453,180	18%	+ 4%
Aquatic Plants	80,131,719	5%	83,181,439	5%	+ 4%
Specialty Greenhouse Products	96,158,062	6%	99,817,727	6%	+ 4%
Christmas Trees	128,210,750	8%	133,090,302	8%	+ 4%
Other Products ³	160,263,437	10%	166,362,878	10%	+ 4%
Total	\$1,602,634,372	100%	\$1,663,628,780	100%	+ 4%

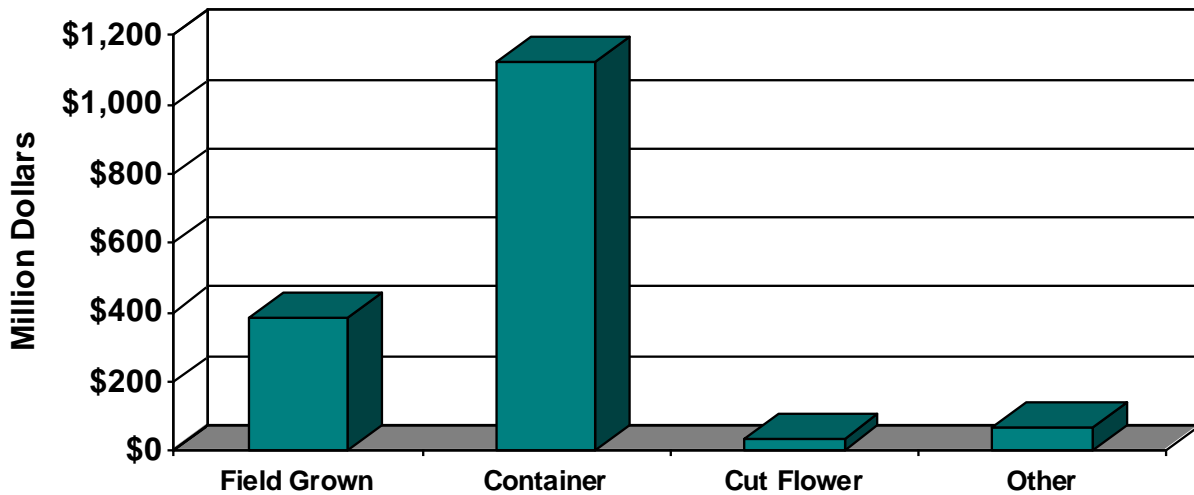
³Other products include items such as seeds, bulbs, etc., and any other sales related to other products and services not previously listed.

Method for Plant Products Sold

Of the total 2007 plant-related sales reported by licensed horticulture operations, 70% or \$1.12 billion were for container-grown products (including all types of greenhouse production). Sales of field-grown products totalled \$385 million or 24% of total sales. Cut flower and other products made up a relatively small percentage of the total sales with 2% and 4%, respectively.

Sales related to field-grown stock were expected to increase 8% in 2008 while container-grown stock sales were expected to increase 2%. Increases in sales were also expected for both cut flowers and other products, with projected increases of 4%.

Sales by Method of Preparation

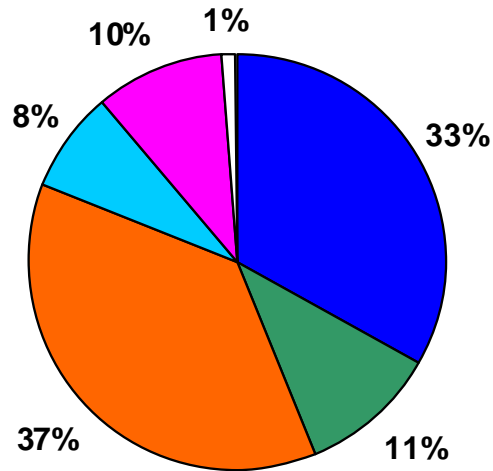


Method of Preparation	2007 Sales		Expected 2008 Sales		Percent Change 2007-2008
	Dollars	Percent	Dollars	Percent	
Field Grown	384,632,250	24%	415,907,195	25%	+ 8%
Container	1,121,844,060	70%	1,147,903,858	69%	+ 2%
Cut flower	32,052,687	2%	33,272,576	2%	+ 4%
Other	64,105,375	4%	66,545,151	4%	+ 4%
Total	\$1,602,634,372	100%	\$1,663,628,780	100%	+ 4%

Source of Plant Material Sold

The 2007 survey identified significant changes in the sources of plant material sold. Survey results indicated a shift away from the importation of plant material from other states towards the purchase of plants from Maryland nurseries or growing plant materials on their own operations. About 33% of the Maryland nursery crop is grown from start to finish and sold directly from the farm. Approximately 37% of the Maryland nursery crop is purchased from another Maryland nursery finished; this was an increase of 72% from the 2003 survey. A very small amount (1%) was imported from outside the United States.

Source of Plants Sold in Maryland



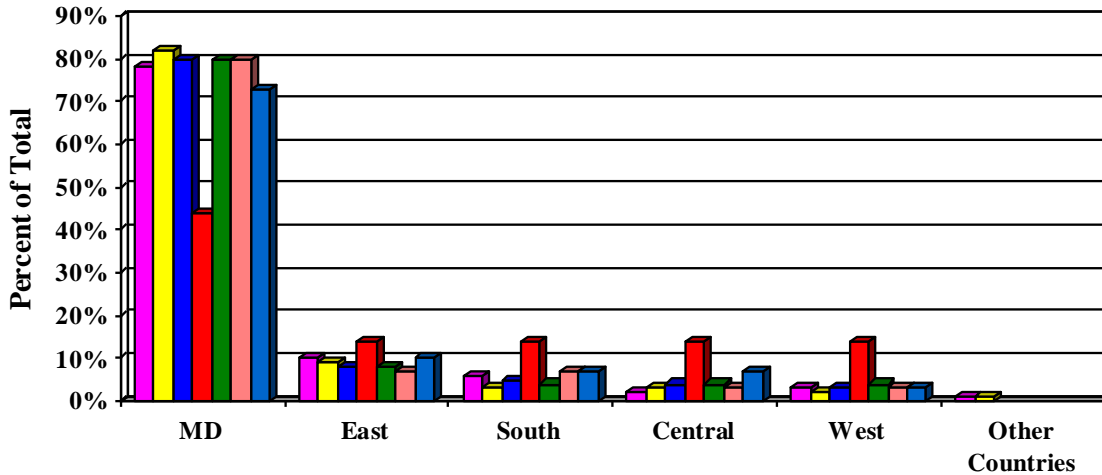
	Source of Plants Sold	2007 Sales	
		Dollars	Percent
1	Grown entirely on the farm where produced	528,869,343	33%
2	Purchased from another Maryland nursery unfinished	176,289,781	11%
3	Purchased from another Maryland nursery finished	592,974,717	37%
4	Imported from another state unfinished	128,210,750	8%
5	Imported from another state finished	160,263,437	10%
6	Imported from outside the U.S.	16,026,344	1%

Destination of Plants Shipped

A total of 306 licensed Maryland nurseries reported shipping plant material. Woody plants were shipped by 27% of respondents (84 producers). Herbaceous perennials were shipped by 81 producers; annuals were shipped by 63 producers; aquatic plants were shipped by 15 producers; and 63 producers shipped other goods such as seed, and bulbs, Christmas trees, and specialty greenhouse products.

Most of the plant material was shipped within the state. The remaining material was shipped primarily to the Eastern or Southern United States. A small amount of plant material was shipped to Canada and Other countries.

Destination of Plants Shipped



<ul style="list-style-type: none"> ■ Woody Plants ■ Annuals ■ Specialty Greenhouse Products ■ Other Products 	<ul style="list-style-type: none"> ■ Herbaceous Perennials ■ Aquatic Plants ■ Christmas Trees
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	Percent of plants (by type) shipped to each destination						
	MD	Eastern U.S.	Southern U.S.	Central States	Western States	Canada	Other countries
Woody plants	78%	10%	6%	2%	3%	1%	< 1%
Herbaceous perennials	82%	9%	3%	3%	2%	1%	< 1%
Annuals	80%	8%	5%	4%	3%		
Aquatic plants	44%	14%	14%	14%	14%		
Specialty Greenhouse Products	80%	8%	4%	4%	4%		< 1%
Christmas Trees	80%	7%	7%	3%	3%		
Other products ⁴	73%	10%	7%	7%	3%		< 1%

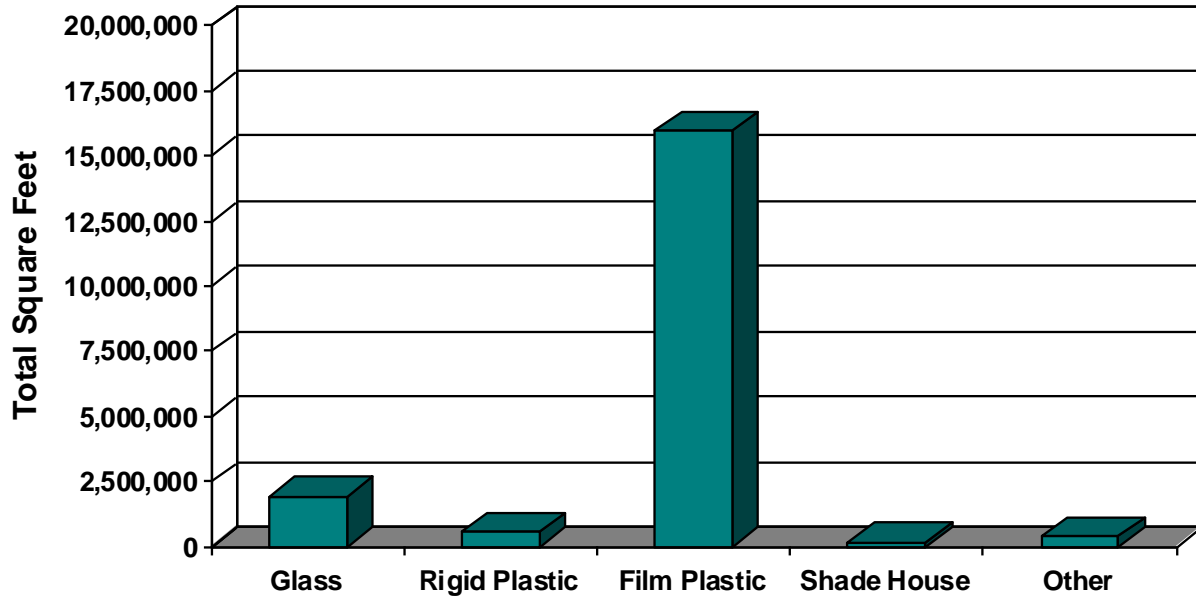
Eastern States include ME, VT, NH, MA, CT, RI, NY, PA, DE, NJ, VA, WV
 Southern States include SC, GA, AL, FL, AR, LA, MS, NC, TN, TX, OK, PR
 Central States include OH, MI, WI, IN, IL, IA, NE, KS, MO, ND, SD, MN, KY
 Western states include AK, WA, OR, ID, MT, WY, NV, UT, CO, NM, CA, AZ, HI

⁴Other products include items such as seeds, bulbs, etc., and any other sales related to other products not previously listed.

Total Acreage and Covered Growing Space

Licensed horticultural operations reported 20,879 acres used for nursery production and sales in 2007. This included 19.0 million square feet of covered space. Acreage includes all production, sales, and holding areas. Of the total covered space, 84% of the area was in film plastic greenhouses, hoop houses, or over-winter poly houses. Glass greenhouses and rigid plastic greenhouses accounted for 13% of the total covered area. The value of the total acreage reported by licensed horticulture operations (including their structures and equipment) totaled close to \$1 billion.

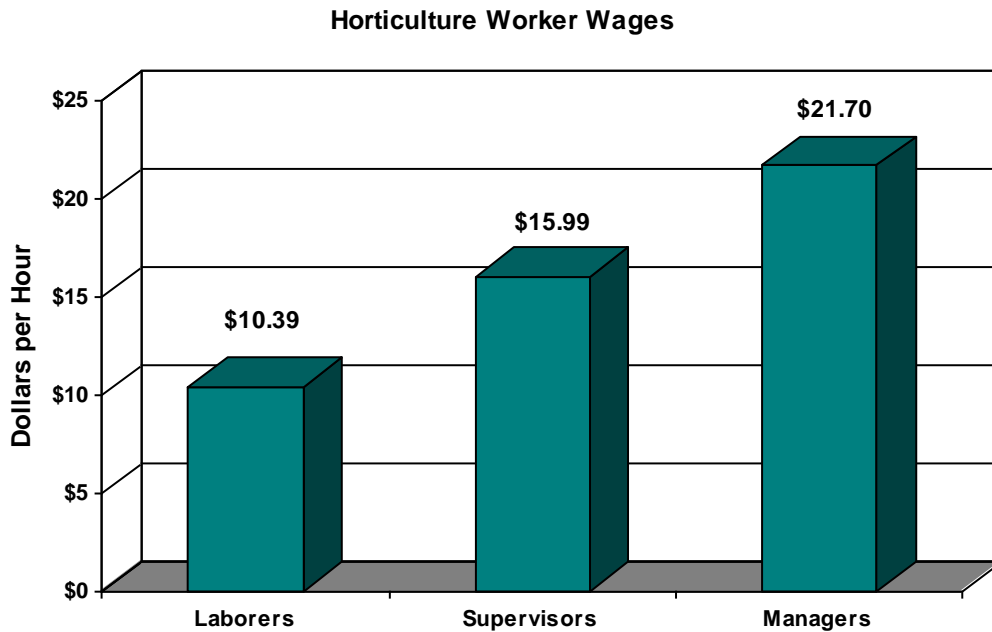
Covered Growing Space by Type



Covered Growing Space	Total Space (ft ²)	Percent of Total
Glass greenhouses	1,900,000	10%
Rigid plastic greenhouses	570,000	3%
Film plastic greenhouses, hoop houses, over-winter poly houses	15,960,000	84%
Shade houses	190,000	1%
Other covered space	380,000	2%

Number of Horticulture Workers and Wages

In 2007, there were 18,588 workers employed by Maryland's state-licensed nursery and landscape businesses. Over half (59%) of the industry employees were employed for at least 150 days and the remainder were seasonal workers. Total wages paid by the sampled population in 2007 were \$451 million and labor overhead totaled 13.2%. The labor overhead includes items such as payroll taxes, workers' compensation, benefits, and other costs of hiring and processing foreign labor. On average, laborers were paid \$10.39 per hour, supervisors were paid \$15.99 per hour, and managers were paid \$21.70 per hour.³ Out of the 18,588 total workers employed, 3,143 workers were reported as migrant workers, who were either foreign or domestic. Of this total, 365 were enrolled in the H2A program, and 892 were enrolled in the H2B program.



Tenure

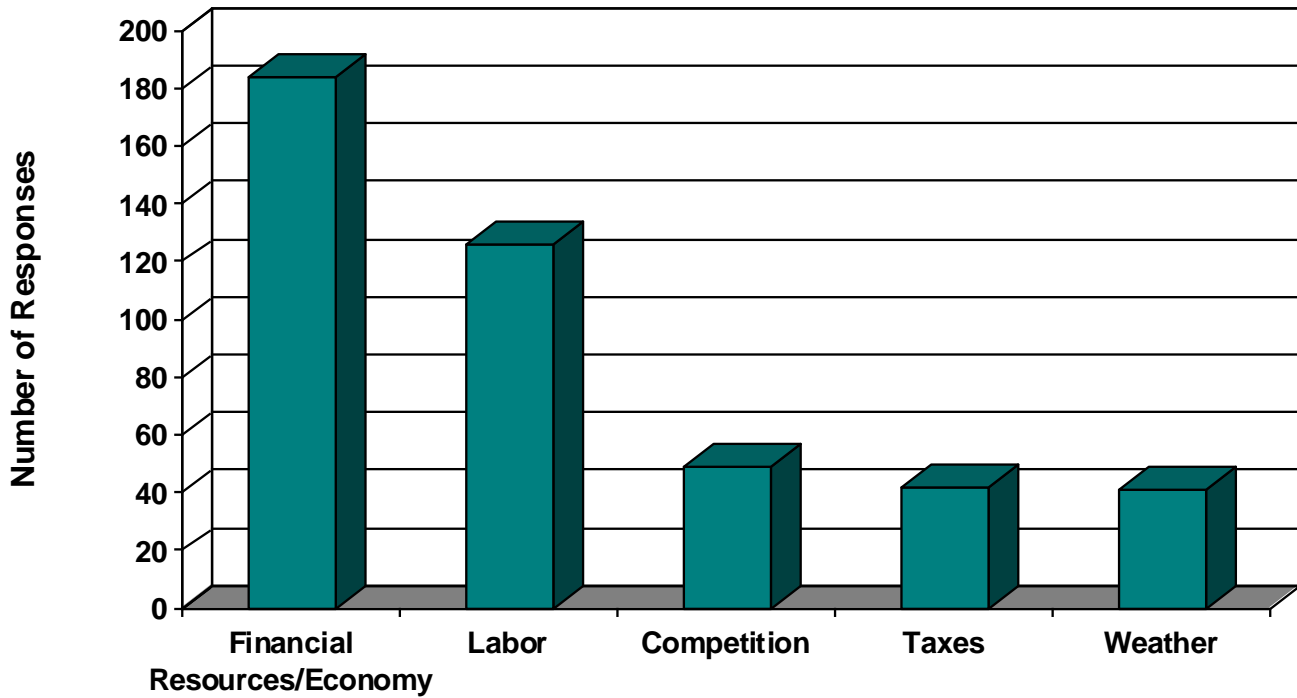
Nursery and landscape businesses have a long history in Maryland. The average Maryland nursery has been in business for 25.2 years. Close to 75% of the nursery operations are family owned and operated. The oldest family nursery operation opened over 150 years ago.

⁵ The estimates for average wages are simply averages for all licensed operations that reported a wage rate with no consideration for the number of workers employed.

Industry Concerns

The 2007 Horticulture Industry Survey asked respondents to list the most important factors that limit growth or were problematic to their business. The results from the 2007 survey indicated that five factors affected their growth or were potential obstacles. These factors were financial resources/economy, labor, competition, taxes, and weather. The two most often cited were economy and labor while competition was the third most common response.

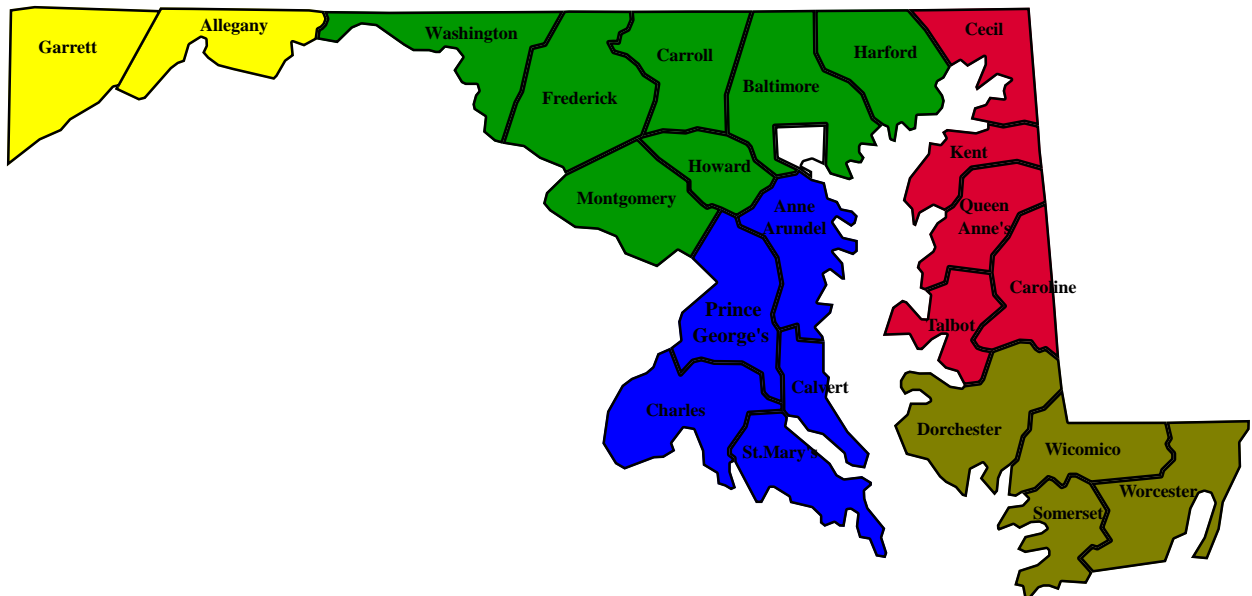
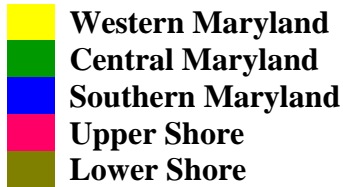
Factors Limiting Growth



Factors Limiting Growth	Number Responding	Percent of Respondents
Financial Resources/ Economy	183	41%
Labor	126	29%
Competition	49	11%
Taxes	42	10%
Weather	41	9%

REGIONAL PROFILES OF HORTICULTURE IN MARYLAND

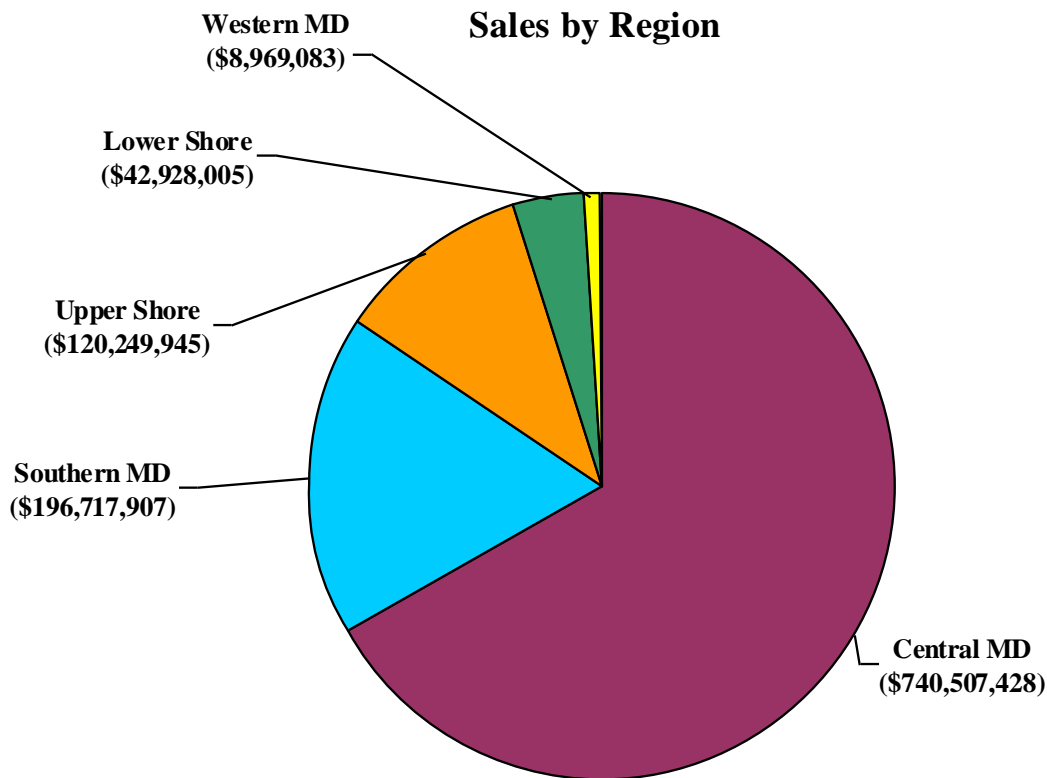
Maryland was divided geographically into five regions – the mountainous Western region, a Central urban core, Southern Maryland and rural counties on the Eastern Shore. Regions defined for the 2007 Horticulture Survey correspond to Maryland Crop Reporting Districts (as defined by USDA-Maryland Agricultural Statistics Service). The Western region includes Allegany and Garrett counties; the Central region includes Baltimore, Carroll, Frederick, Harford, Howard, Montgomery, and Washington counties; the Southern region includes Anne Arundel, Calvert, Charles, Prince George's and St. Mary's counties; the Upper Shore region includes Caroline, Cecil, Kent, Queen Anne's, and Talbot counties; and the Lower Shore region includes Dorchester, Somerset, Wicomico, and Worcester counties.



Sales by Region

The Central region, which includes the areas around the cities of Baltimore and Washington, D.C., leads the state in the value of horticulture sales and services. In 2007, state-licensed companies in this region had \$373 million in landscape sales. Central Maryland represented a large portion of wholesale plant sales (\$282 million) as well. Southern Maryland ranked second in terms of total sales of plants and products and services.

Over \$851 million⁴ in total sales of horticultural plants, products, and services could not be classified by region because either they were reported by large chain stores with multiple locations statewide or by large companies unable to provide a regional breakout of sales.



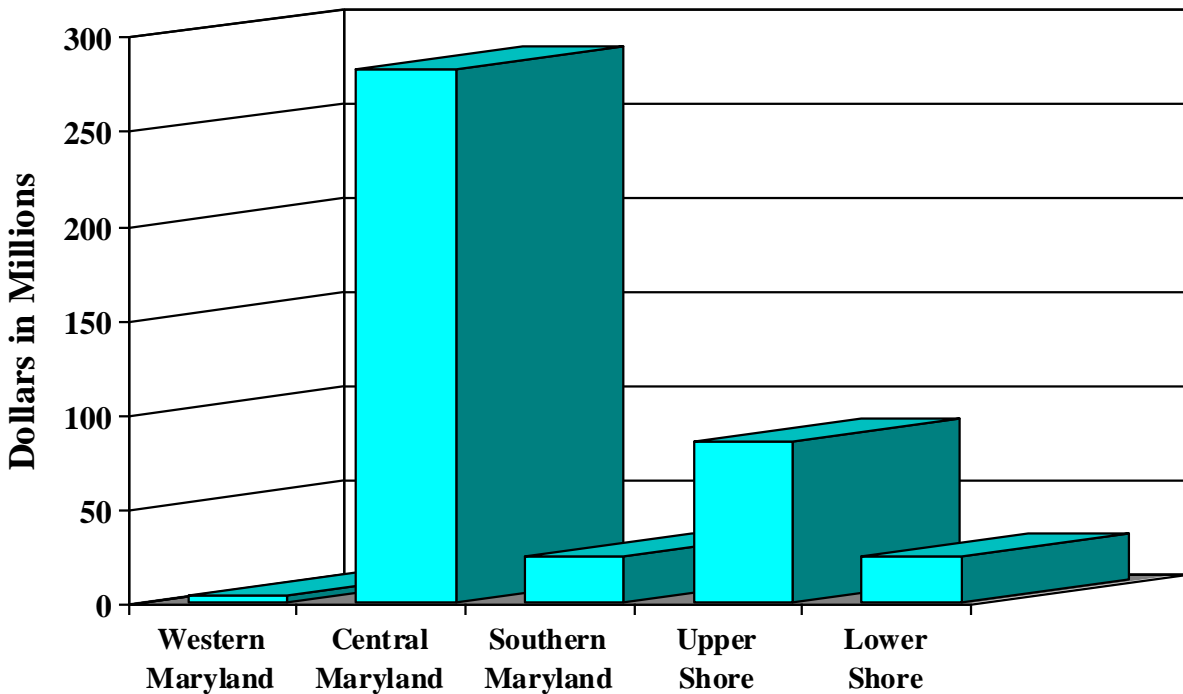
⁶ \$851 million is not included in regional distribution pie chart.

Sales of Horticulture Products by Business Function by Region

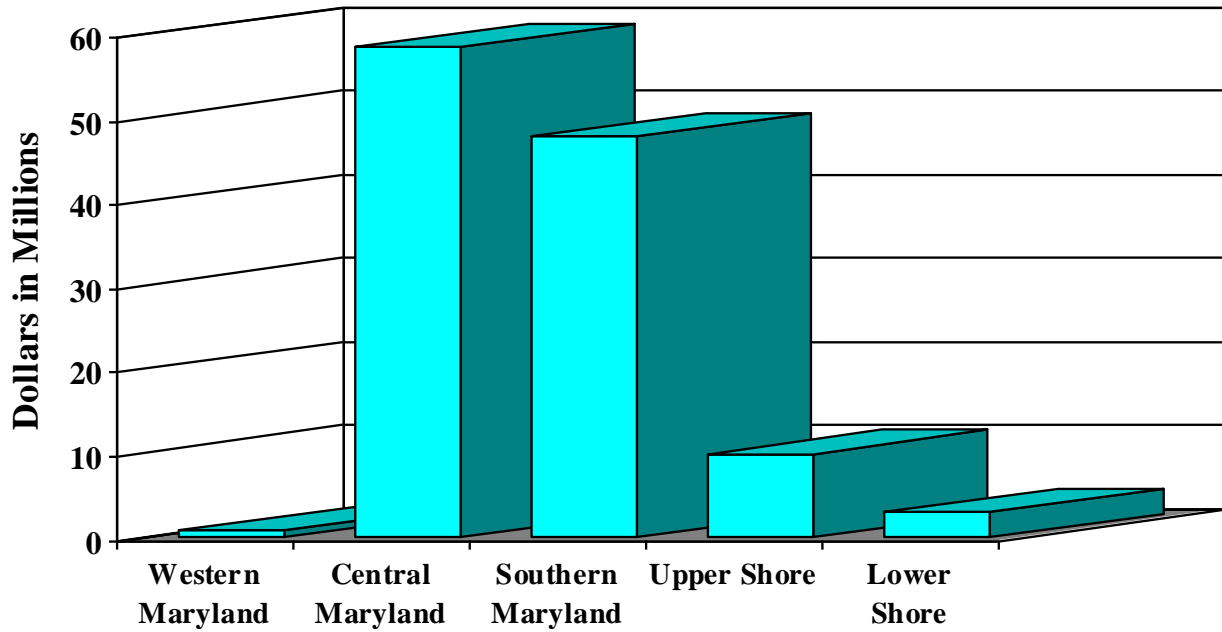
Most of the horticultural retail and landscape sales were made in the urban central region of the State. There were also large numbers of plants grown and sold wholesale here. Wholesale production was also significant on the upper Eastern Shore.

	Western Maryland	Central Maryland	Southern Maryland	Upper Eastern Shore	Lower Eastern Shore	Businesses operating statewide
Wholesale sales	3,356,383	281,631,549	23,934,671	84,896,796	23,863,152	4,808,339
Retail sales	731,000	58,405,669	47,750,995	9,941,179	2,860,772	840,006,849
Landscape installation/maintenance	4,390,300	372,529,377	119,112,704	24,076,714	16,204,081	6,208,226
Other sales and products	491,400	27,940,833	5,919,537	1,335,256		253,070

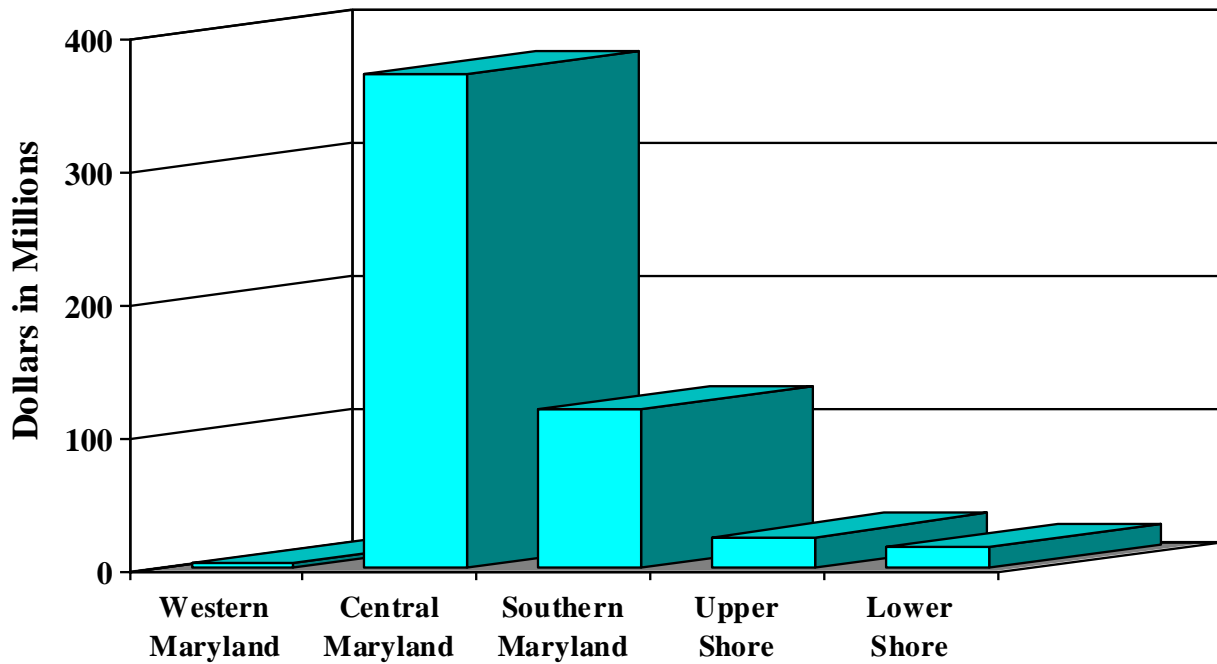
Regional Wholesale Horticulture Sales



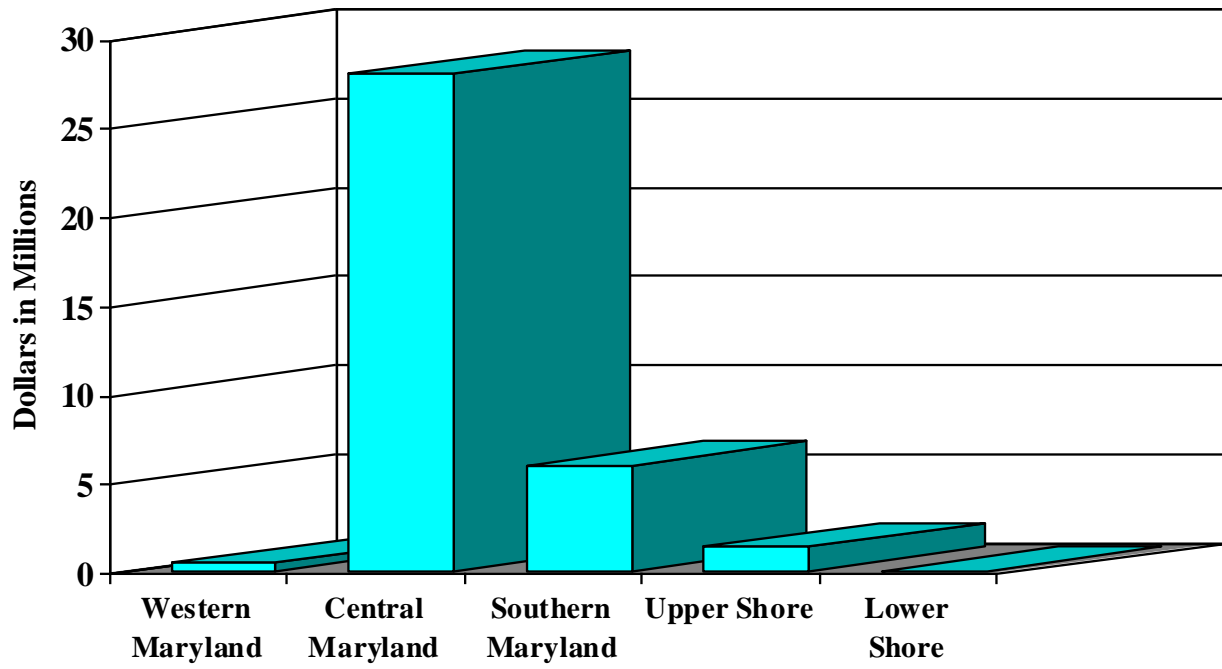
Regional Retail Horticulture Sales



Regional Landscape Installation and Maintenance Sales



Regional Other Sales and Products

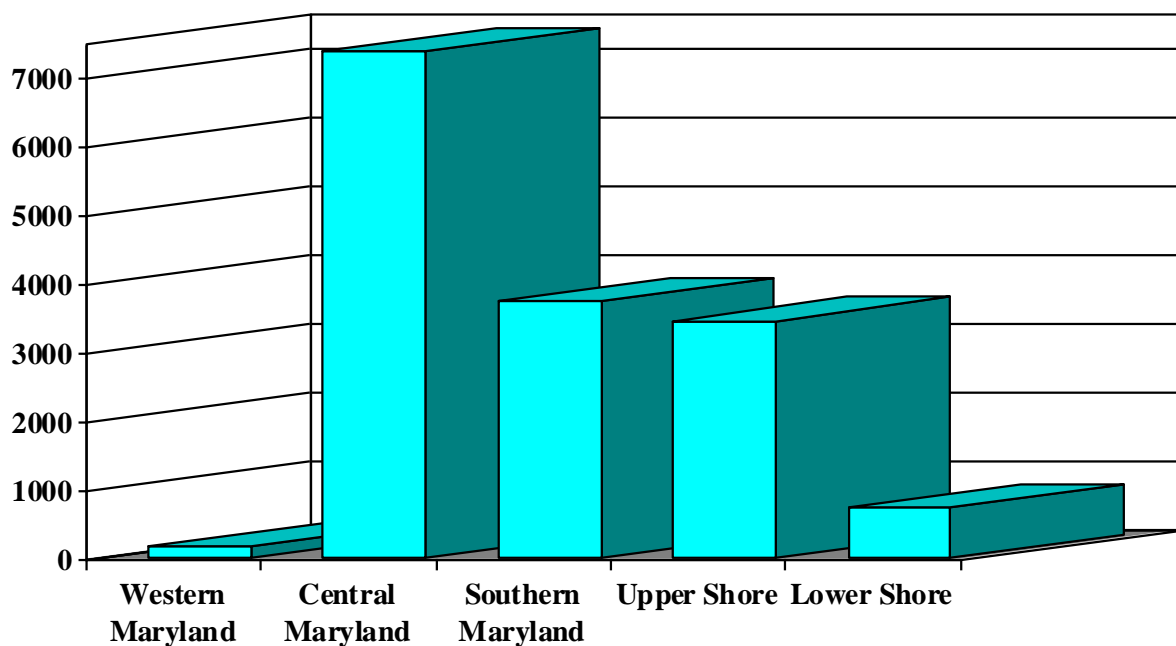


Labor and Wages by Region

In 2007, 18,588 workers were employed in Maryland's nursery and landscape industries. The Central region led the State with 7,348 of the horticultural workers employed by state licensed operations and in second was the Southern region with 3,712 workers. Chain stores and nurseries located in multiple regions employed 3,188. The remaining 4,340 workers were employed in the Western, Upper Eastern Shore and Lower Eastern Shore regions. Nearly 41% of all workers employed by the industry worked on a part-time basis (less than 150 days) in 2007.

Regions	Number of Workers Employed Less than 150 Days	Number of Workers Employed 150 Days or More	Total Number of Workers Employed in 2007
Western Maryland	66	99	165
Central Maryland	2,793	4,555	7,348
Southern Maryland	1,374	2,338	3,712
Upper Eastern Shore	2,058	1,384	3,442
Lower Eastern Shore	271	462	733
Statewide Businesses	1,008	2,180	3,188
Total	7,570	11,018	18,588

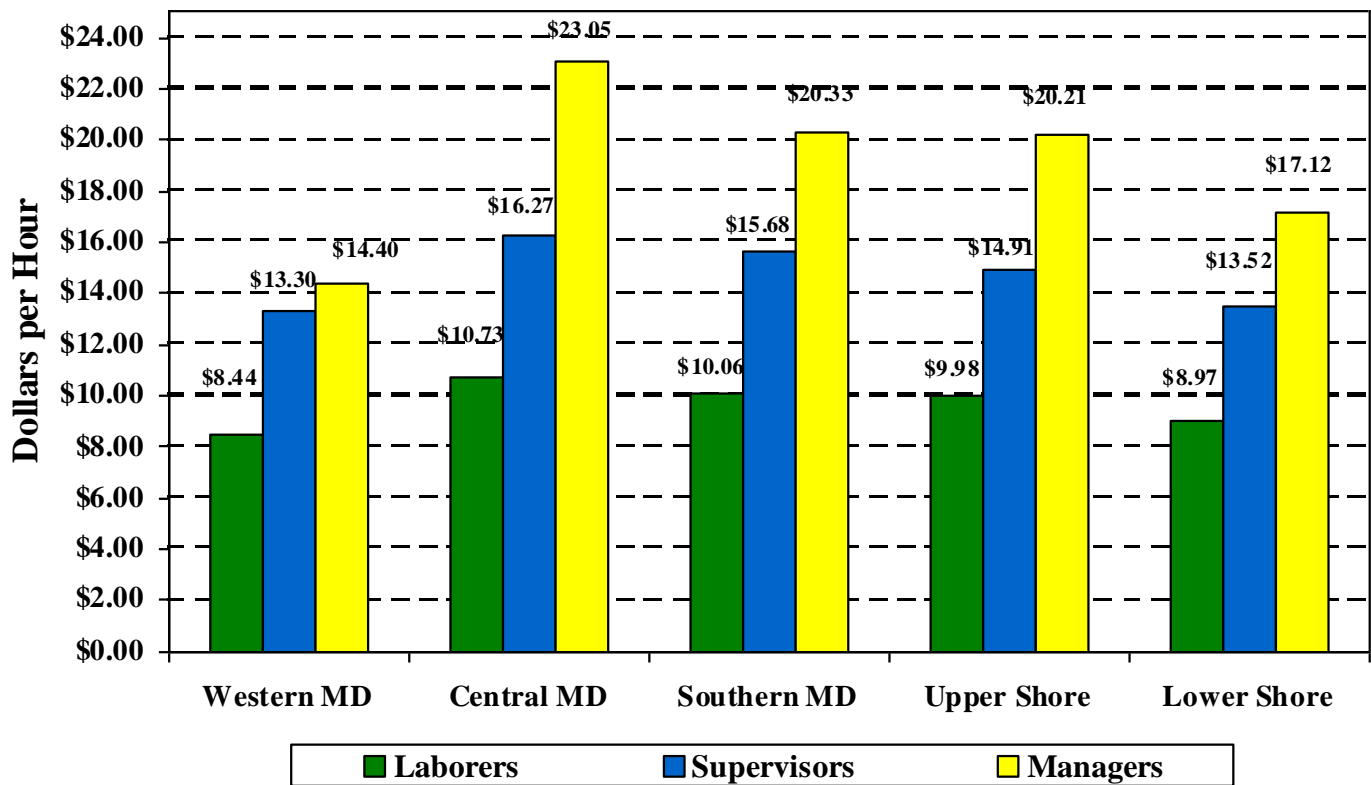
**Number of Horticulture Workers
by Region**



Total wages paid by the horticultural industry in 2007 were \$451 million. The majority of the wages paid were in Maryland's Central region accounting for \$179 million of all wages paid by State licensed businesses. In Southern Maryland, wages totaled just over \$76 million. Statewide, chain stores and operations located in multiple regions paid horticultural workers an estimated \$99 million.

Regions	Total Wages
Western Maryland	\$2,741,183
Central Maryland	\$179,320,108
Southern Maryland	\$76,406,265
Upper Eastern Shore	\$77,780,632
Lower Eastern Shore	\$15,461,974
Statewide Businesses	\$99,155,365
Total	\$450,865,527

Horticulture Workers Average Salaries

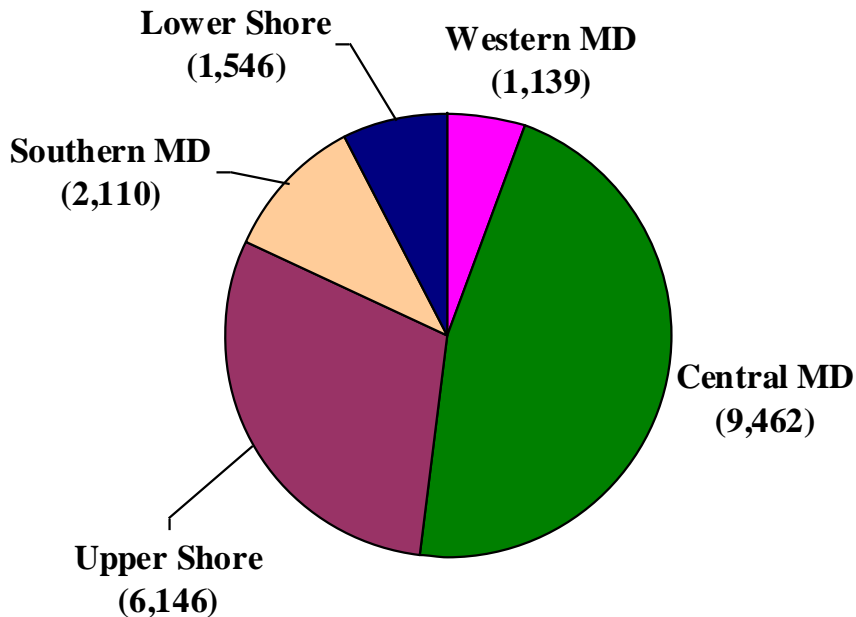


Acreage in Horticultural Crops

Total nursery production and sales area in 2007 totaled 20,879 acres, including 20,443 acres in open ground and 19.0 million square feet (436 acres) in covered space. Nearly 76% of the open land was located in the Central region and Upper Eastern Shore. Central region businesses reported 9,462 acres of open ground and over 5 million square feet of covered space. The Upper Eastern Shore had 6,146 acres of open ground and nearly 5 million square feet of covered space. The Lower Eastern Shore had 1,546 acres of open ground and nearly 5 million square feet of covered space. The Upper Eastern Shore had 6,146 acres of open ground and nearly 5 million square feet of covered space. The Lower Eastern Shore had 1,546 acres of open ground and nearly 5 million square feet of covered space. The Upper Eastern Shore had 6,146 acres of open ground and nearly 5 million square feet of covered space. The Lower Eastern Shore had 1,546 acres of open ground and nearly 5 million square feet of covered space.

Region	Open Land (acres)	Covered Space (ft ²)
Western Maryland	1,139	53,767
Central Maryland	9,462	5,275,348
Southern Maryland	2,110	2,440,903
Upper Eastern Shore	6,146	4,867,862
Lower Eastern Shore	1,546	6,329,741
Statewide Operations	40	32,379

**Acreage in Horticulture Crops
by Region**



Western Maryland
Allegany, Garrett Counties

Sales

All Sales of horticulture products and services - 2007		\$8,969,083
Wholesale	37%	\$3,356,383
Retail	8%	\$731,000
Landscape installation/maintenance	49%	\$4,390,300
Other	6%	\$491,400

Land

Area in production (open ground)	1,139 acres
----------------------------------	-------------

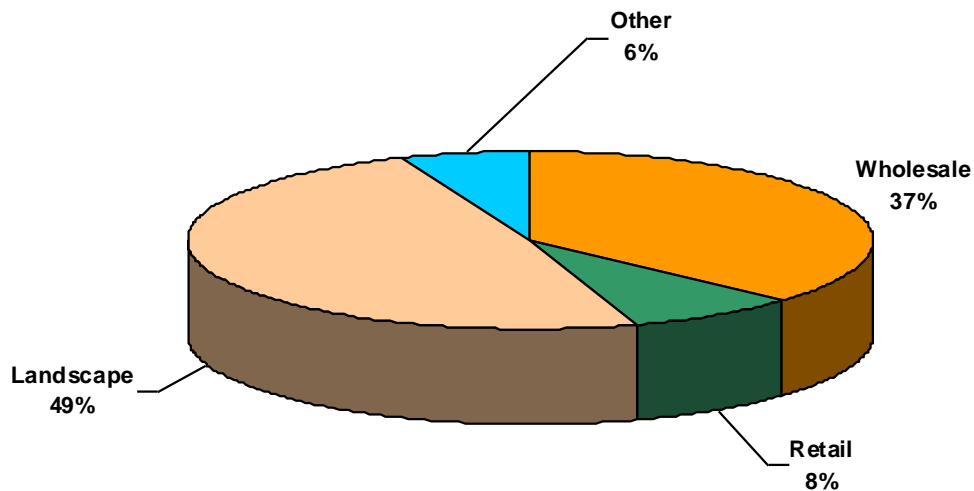
Wages

Total Wages paid to horticulture workers - 2007	\$2,741,183
Average wage rate:	
Laborers	\$8.44
Supervisors	\$13.30
Managers	\$14.40

Labor

Number of horticulture workers:		
Full-time	99	
Seasonal	66	

**Horticulture Sales by Type
Western Maryland**



Central Maryland

Baltimore, Frederick, Carroll, Harford, Howard, Montgomery, Washington Counties

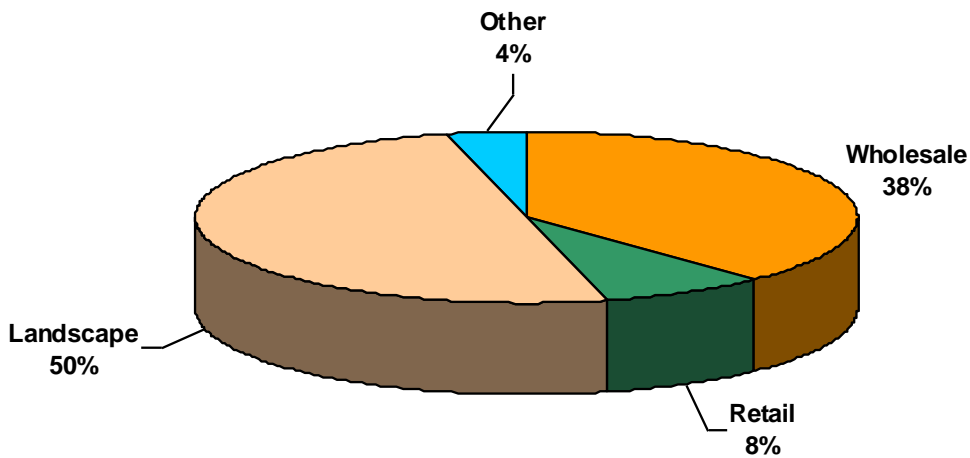
Sales		
All Sales of horticulture products and services - 2007		\$740,507,428
Wholesale	38%	\$281,631,549
Retail	8%	\$58,405,669
Landscape installation/maintenance	50%	\$372,529,377
Other sales and products	4%	\$27,940,833

Land	
Area in production (open ground)	9,462 acres

Wages		
Total Wages paid to horticulture workers - 2007		\$179,320,108
Average wage rate:	Laborers	\$10.73
	Supervisors	\$16.27
	Managers	\$23.05

Labor		
Number of horticulture workers:	Full-time	4,555
	Seasonal	2,793

**Horticulture Sales by Type
Central Maryland**



Southern Maryland

Anne Arundel, Calvert, Charles, Prince George's, St. Mary's Counties

Sales

All Sales of horticulture products and services - 2007		\$196,717,907
Wholesale	12%	\$23,934,671
Retail	24%	\$47,750,995
Landscape installation/maintenance	61%	\$119,112,704
Other sales and products	3%	\$5,919,537

Land

Area in production (open ground)	2,110 acres
----------------------------------	-------------

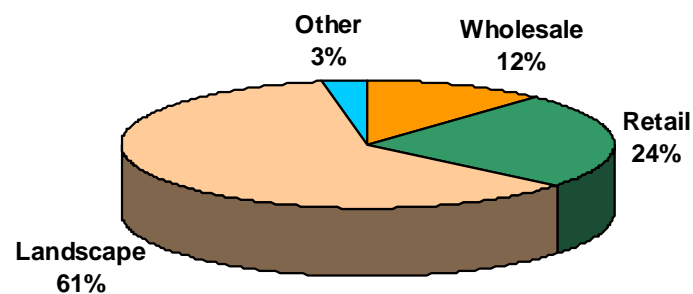
Wages

Total Wages paid to horticulture workers - 2007		\$76,406,265
Average wage rate:	Laborers	\$10.06
	Supervisors	\$15.68
	Managers	\$20.33

Labor

Number of horticulture workers:	Full-time	2,338
	Seasonal	1,374

Horticulture Sales by Type Southern Maryland



Upper Eastern Shore

Caroline, Cecil, Kent, Queen Anne's, Talbot Counties

Sales

All Sales of horticulture products and services - 2007		\$120,249,945
Wholesale	71%	\$84,896,796
Retail	8%	\$9,941,179
Landscape installation/maintenance	20%	\$24,076,714
Other sales and products	1%	\$1,335,256

Land

Area in production (open ground)	6,146 acres
----------------------------------	-------------

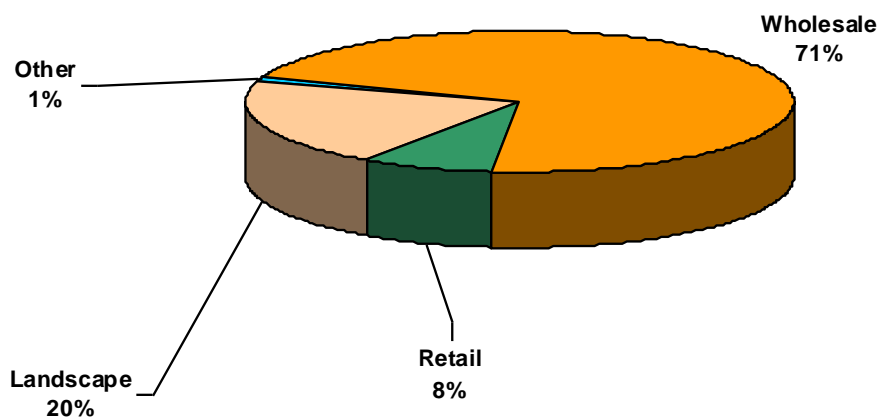
Wages

Total Wages paid to horticulture workers - 2007		\$77,780,632
Average wage rate:	Laborers	\$9.98
	Supervisors	\$14.91
	Managers	\$20.21

Labor

Number of horticulture workers:	Full-time	1,384
	Seasonal	2,058

Horticulture Sales by Type Upper Eastern Shore



Lower Eastern Shore

Dorchester, Somerset, Worcester, Wicomico Counties

Sales

All Sales of horticulture products and services - 2007		\$42,928,005
Wholesale	56%	\$23,863,152
Retail	6%	\$2,860,772
Landscape installation/maintenance	38%	\$16,204,081

Land

Area in production (open ground)	1,546 acres
----------------------------------	-------------

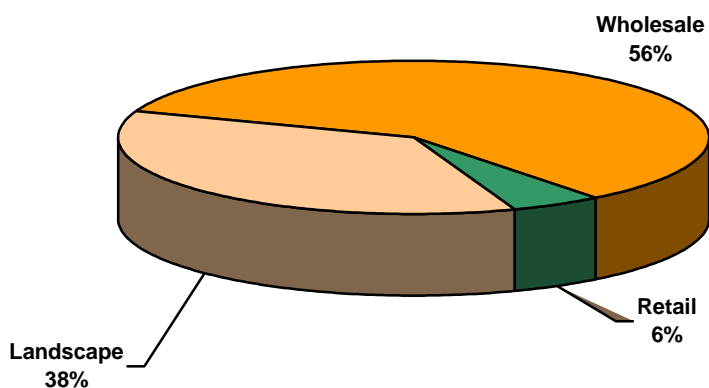
Wages

Total Wages paid to horticulture workers - 2007		\$15,461,974
Average wage rate:	Laborers	\$8.97
	Supervisors	\$13.52
	Managers	\$17.12

Labor

Number of horticulture workers:	Full-time	462
	Seasonal	271

Horticulture Sales by Type Lower Eastern Shore



2007 MARYLAND HORTICULTURE SURVEY

USDA - Maryland Agricultural Statistics Service
50 Harry S Truman Drive
Annapolis, MD 21401

Dear Green Industry Professional,

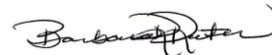
This survey is being conducted by the USDA's National Agricultural Statistics Service to document the current growth, scope and impact of the Maryland Green Industry, including Garden Centers.

The survey is being sent to all licensed nursery and landscape operations in Maryland. **If you do business at more than one location, please combine the data for all locations on one questionnaire. Include sales from Maryland locations only.**

Response to the survey is voluntary; however, your response is important to ensure reliable results. The information you provide is kept confidential and used only in combination with other reports to produce State or regional results.

Please return your report in the enclosed postage paid envelope. If you have any questions, please do not hesitate to give me a call. We appreciate your help in this important effort.

Sincerely,



Barbara Rater
Maryland State Director

Note: Use 2007 fiscal year if unable to give calendar year data.

SECTION 1 - Type of Operation

1. Did you produce or sell nursery or greenhouse crops or provide landscape services during 2007?

Yes **[Continue Below]**

No **[skip to page 4, question 25]**

2. Which of the following categories **BEST** describes your business (*check one*):

Grower - wholesale only

Grower - retail and/or wholesale

Landscaper and/or Interiorscaper (*installation only*)

Horticulture distributor or re-wholesale

Landscaper and/or Interiorscaper (*maintenance only*)

Retail sales

Landscaper and/or Interiorscaper (*installation/ maintenance*)

Other (*Please specify*)

3. How many years has this business been in operation? 200

200

4. Is this operation a Family Owned Business? (*Circle one*) **YES** **NO**

SECTION 2 - Gross Sales

5. What were your total gross sales from nursery or greenhouse crops and landscaping? (*Including hardscapes e.g. walkways, irrigation systems, decks etc.*)

2007	Projected 2008
300	300

SECTION 2 - Gross Sales (continued)

6. What **PERCENT** of your total sales were from:

2007 **Projected 2008**

a) wholesale (<i>plant sales</i>).....	400	408
b) wholesale (<i>hardscape sales only</i>)	401	409
c) retail (<i>plant sales</i>).....	402	410
d) retail (<i>hardscape sales only</i>).....	403	411
e) landscape/interiorscape installation - (<i>excluding hardscape</i>)	404	412
f) landscape/interiorscape installation - (<i>hardscape only</i>).....	405	413
g) landscape/interiorscape maintenance	406	414
h) other (<i>please specify</i>)	407	415
<i>(Percentages should add to 100%)</i>	100 %	100 %

7. What **percent** of your plant sales were by the following categories?
(*include plants installed and maintained*)

2007 **Projected 2008**

a) Woody plants.....	450	457
b) Herbaceous perennials.....	451	458
c) Annuals	452	459
d) Aquatic Plants	453	460
e) Specialty greenhouse (<i>house plants & tropicals</i>).....	454	461
f) Christmas trees	455	462
g) Other (<i>e.g. seeds, sod, bulbs</i>)	456	463
<i>(Percentages should add to 100%)</i>	100 %	100 %

8. What **percent** of your sales were by the following methods?
(*include plants installed and maintained*)

2007 **Projected 2008**

a) Field Grown (<i>include aquatic plants</i>).....	500	504
b) Containers (<i>all types including greenhouse production</i>)	501	505
c) Cut Flowers.....	502	506
d) Other (<i>please specify</i>)	503	507
<i>(Percentages should add to 100%)</i>	100 %	100 %

9. Of the plants sold or installed in **2007**, what **percent** were

a) grown entirely on your farm/nursery	550
b) purchased from another Maryland nursery and finished by you	551
c) purchased from another Maryland nursery completely finished	552
d) imported from another state and finished by you.....	553
e) imported from another state completely finished	554
f) imported from outside the USA	555
<i>(Percentages should add to 100%)</i>	100 %

10. Did you wholesale and/or re-wholesale materials to customers in 2007?

Yes [Continue]

No [skip to Section 4, question 12]

11. Please enter the percent of your 2007 sales by plant material category sold to each region identified in the table below.

States	Woody Plants	Herbaceous Perennials	Annuals	Aquatic Plants	Specialty Greenhouse	Christmas Trees	Other (e.g. seeds, sod, bulbs)
Maryland	701	702	703	704	705	706	707
Eastern States	708	709	710	711	712	713	714
Southern States	715	716	717	718	719	720	721
Central States	722	723	724	725	726	727	728
Western States	729	730	731	732	733	734	735
Canada	736	737	738	739	740	741	742
Other Countries:							
_____	743	744	745	746	747	748	749
_____	750	751	752	753	754	755	756

SECTION 3- Wholesale Sales and Shipping

NOTE: Eastern States include CT, DC, DE, MA, ME, NH, NJ, NY, PA, RI, VT, WV
 Southern States include AL, AR, FL, GA, KY, LA, MS, NC, OK, Puerto Rico, SC, TN, TX, VA
 Central States include IA, IL, IN, KS, MI, MO, MN, ND, NE, OH, SD, WI
 Western states include AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

Section 4 - Land, Buildings, and Equipment

12. What is your estimate of the current market value of land, structures and equipment used (owned and/or rented) in your operation as of December 31, 2007?

13. What was the total acreage your operation owned and/or rented for nursery sales and production in 2007? (Including all production, sales, and holding areas).....

14. Considering the total acreage in 2007, did your operation have any greenhouses, polyhouses or other covered space?

Yes [Continue]

No [skip to question 16]

15. Please indicate type and area of covered space in use in 2007. (Include covered space used for holding, selling, or finishing product.)

Square Feet

- a) Glass greenhouses.....
- b) Rigid plastic greenhouses.....
- c) Film plastic greenhouses, hoop houses, or over winter poly house (single or multi-layer).....
- d) Shade houses.....
- e) Other (please specify)

901
902
903
904
905

16. List the Maryland counties where your operation is located. If your operation is in more than one county, list the total acreage in each county. (report acreage to the nearest whole number)

COUNTY	ACREAGE
120	121
122	123
124	125

SECTION 5 - Labor

17. What was the TOTAL number of workers employed by this operation during 2007? 130

a) Of these workers, how many were paid for working 149 days or less? 131

b) Of these workers, how many were paid for working 150 days or more? 132

18. Of these workers (item 17), how many were foreign laborers or migrant workers? 133

a) How many workers from the total above (item 18) were from the H2A program? 233

b) How many workers from the total above (item 18) were from the H2B program? 333

c) How many workers from the total above (item 18) were from other foreign or migrant worker programs? 433

19. What were the total gross wages paid by your operation during 2007? (Include employer's cost for social security, worker's compensation, insurance premiums and any other benefits provided). 134

20. Of the total gross wages paid (item 19) how much was for:

a) Labor overhead 139
(e.g. payroll taxes, workers' comp, benefits, other costs of hiring and processing foreign labor)

21. During 2007, what was the average hourly wage for:

a) Laborers 135

b) Supervisors 136

c) Managers 137

22. How many UNPAID workers were on this operation in 2007? (Include family members, operators, and partners not paid a salary) 138

SECTION 6 - Industry Factors

23. Please list the 3 most important factors that are limiting growth or are problematic for your business.

	OFFICE USE
	160
	161
	162

24. Is any of your land in a land preservation/conservation program? (Circle one) YES NO

SECTION 7 - Conclusion

25. Would you like a copy of the survey results? (Circle one) YES NO

Please share with us any comments on issues affecting your industry:

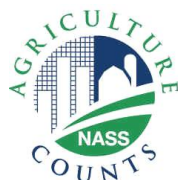
Reported by: _____ Date: _____ Phone: _____

If additional help is needed please call 800-675-0295. Thank you for your time. For office use:

001	002	170	180	190	099	101	910	098	100
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Sellman, Sheldaria
Taylor, Bonet
Wallingsford, Biz

For additional information and statistical data pertaining to the agricultural industry gathered by the State of Maryland or United States Department of Agricultural, write or call:

NATIONAL AGRICULTURAL STATISTICS SERVICE
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