Economic Impact of the Lawn and Landscape Industry

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Vice President of Government Affairs
Between 1982 and 1997, approximately 7 million acres of agricultural land and 10 million acres of forest land were converted to residential, transportation, industrial, urban, and other uses.
85 Million households participated in garden activities

- Spent an average of $466 per household on lawns and gardens
- Total Lawn and Garden Retail Sales $39.6 Billion
- From 1997-2002 Sales increased $13 Billion
- People 35-44 men, college grads, 2 person households incomes over $75,000
## Statistics of US Businesses Landscaping

<table>
<thead>
<tr>
<th>Employment size</th>
<th>Number of Firms</th>
<th># of Employees</th>
<th>Annual Payroll ($1,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1998</td>
<td>64,584</td>
<td>363,906</td>
<td></td>
</tr>
<tr>
<td>Year 1999</td>
<td>64,683</td>
<td>393,575</td>
<td></td>
</tr>
<tr>
<td>Year 2000</td>
<td>66,331</td>
<td>415,873</td>
<td>9,770,825</td>
</tr>
<tr>
<td>Year 2001</td>
<td>72,504</td>
<td>446,000</td>
<td>11,258,488</td>
</tr>
</tbody>
</table>
Non-employer Statistics summarizes the number of establishments and sales or receipts of companies with no paid employees.

<table>
<thead>
<tr>
<th>Year</th>
<th>Firms</th>
<th>Receipts ($1,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997</td>
<td>153,414</td>
<td>3,028,391 Billion</td>
</tr>
<tr>
<td>2000</td>
<td>172,141</td>
<td>4,313,250 Billion</td>
</tr>
</tbody>
</table>
## National Gardening Survey

### Questions By the Green Industry

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mil.</td>
<td>14.3</td>
<td>13.7</td>
<td>14.9</td>
<td>16.3</td>
<td>17.8</td>
<td>19.4</td>
</tr>
<tr>
<td>L/L Maint</td>
<td>2.0</td>
<td>2.4</td>
<td>2.6</td>
<td>2.8</td>
<td>2.9</td>
<td>3.2</td>
</tr>
<tr>
<td>L/ Const</td>
<td>1.1</td>
<td>1.2</td>
<td>1.3</td>
<td>1.6</td>
<td>1.8</td>
<td>2.1</td>
</tr>
<tr>
<td>L/ Design</td>
<td>5.6</td>
<td>4.1</td>
<td>4.9</td>
<td>5.9</td>
<td>7.1</td>
<td>8.6</td>
</tr>
<tr>
<td>Tree Care</td>
<td>22.4</td>
<td>21.4</td>
<td>22.1</td>
<td>22.9</td>
<td>23.8</td>
<td>24.7</td>
</tr>
</tbody>
</table>

Total
## Average $ Spent

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>L/L Maint.</td>
<td>$533</td>
<td>$581</td>
<td>$540</td>
<td>$543</td>
<td>$547</td>
<td>$550</td>
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<tr>
<td>L/ In Const</td>
<td>$1,772</td>
<td>$2,630</td>
<td>$2,825</td>
<td>$3,035</td>
<td>$3,260</td>
<td>$3,502</td>
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<tr>
<td>L/ Design</td>
<td>$889</td>
<td>$742</td>
<td>$879</td>
<td>$1,043</td>
<td>$1,236</td>
<td>$1,465</td>
</tr>
<tr>
<td>Tree Care</td>
<td>$434</td>
<td>$411</td>
<td>$421</td>
<td>$431</td>
<td>$441</td>
<td>$452</td>
</tr>
<tr>
<td>Total Average House</td>
<td>$647</td>
<td>$855</td>
<td>$925</td>
<td>$1,000</td>
<td>$1,082</td>
<td>$1,170</td>
</tr>
</tbody>
</table>
## Total $ Spent

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Billion</td>
<td>Billion</td>
<td>Billion</td>
<td>Billion</td>
<td>Billion</td>
<td>Billion</td>
<td>Billion</td>
</tr>
<tr>
<td>L/L Maint</td>
<td>$7.6</td>
<td>$7.9</td>
<td>$9.0</td>
<td>$9.7</td>
<td>$10.4</td>
<td>$10.7</td>
</tr>
<tr>
<td>L/In Const</td>
<td>$3.6</td>
<td>$6.3</td>
<td>$7.3</td>
<td>$8.4</td>
<td>$9.7</td>
<td>$11.2</td>
</tr>
<tr>
<td>L/ Design</td>
<td>$1.0</td>
<td>$.9</td>
<td>$1.3</td>
<td>$1.7</td>
<td>$2.3</td>
<td>$3.1</td>
</tr>
<tr>
<td>Tree Care</td>
<td>$2.4</td>
<td>$1.7</td>
<td>$2.9</td>
<td>$3.2</td>
<td>$3.5</td>
<td>$3.9</td>
</tr>
<tr>
<td>Total Spent</td>
<td>$14.6</td>
<td>$16.8</td>
<td>$20.5</td>
<td>$23.0</td>
<td>$25.9</td>
<td>$28.9</td>
</tr>
</tbody>
</table>
Plan to Hire Professional Landscape, Lawn or Tree Care Services In 2003

<table>
<thead>
<tr>
<th>Professional Services</th>
<th>%</th>
<th>Mil.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lawn/Landscape Maintenance</td>
<td>16</td>
<td>17.4</td>
</tr>
<tr>
<td>Tree Care</td>
<td>7</td>
<td>7.6</td>
</tr>
<tr>
<td>Landscape Installation/Construction</td>
<td>3</td>
<td>3.3</td>
</tr>
<tr>
<td>Landscape Design</td>
<td>2</td>
<td>2.1</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>11</td>
<td>11.9</td>
</tr>
<tr>
<td>None</td>
<td>66</td>
<td>71.6</td>
</tr>
<tr>
<td>Plan to Hire Services (Net.)</td>
<td>23</td>
<td>24.9</td>
</tr>
</tbody>
</table>
Kinds of information from new 2002 Economic Census

Sales Shipments, Receipts, or Revenue

Employment (number) and Payroll (amount)

Leased Employment and Payroll

Kind of Business or Activity
Lawn and garden services
Landscaping services
Other landscaping and maintenance services - Specify
Landscape architectural services

Class of Customer
Business, Individual
Ornamental shrub and tree services
PROFESSIONAL AND CONSUMER PESTICIDE AND FERTILIZER MARKETS

2001-02

- Consumer yard, 43%
- Professional T&O, 25%
- Consumer home, 13%
- Structural pest control, 9%
- Industrial vegetation, 9%-a
- Other, 1%

Total market: $4.7 Billion

a- Includes forestry and rangeland.
Quality of Life Benefits

A. Athletic Fields
B. Golf courses
C. Physical and emotional benefits to homeowners who do their own landscape care “do people who garden live longer” horticultural therapy
D. Heat mitigation (compared with pavement)
E. Noise abatement (compared with pavement)
Economic Benefits

A. Turf pesticides sales and advertising
B. Turf nutrients sales and advertising
C. Professional lawn care operators: sales employment
D. Sod Farms: sales and employment
E. Professional sports/stadiums
F. Increase in home resale values
G. Tourism, e.g. parks and grounds around DC mall and similar sites etc
H. Golf courses: equity enhancements for associated homes and employment
Environmental Benefits

A. Erosion control (e.g. Conservation Reserve Program)
B. Cooling in urban areas
C. Increase in biomass
D. Oxygen production
E. Pollutant filtration, with a focus on effluent
F. Aquifer recharge, with a focus on effluent
G. Wildlife habitat
Need quantitative assessment of benefits. Could be used to help balance regulatory and legislative actions.

A clean, concise initiative on this is presently impossible. The scope is complicated, data sources are uneven, and the industry is fragmented.

We need a strategy to identify critical factors and data sources. The strategy needs to enable a team to develop a more accurate and precise benefit assessment. It would also suggest how to integrate this information effectively.
Facts for which EPA doesn't have good data

- What application rates do homeowners actually use?
- What is the cost and performance of alternative turf management programs?
- What is the extent of use of bio pesticides by consumers and professionals?
- How does the value of environmental benefits change with different landscapes?
- How much does pesticide and fertilizer use contribute to overall non-point source pollution?
Green Industry/Turf Surveys

- 2004 Wisconsin Green Industry Survey
- 2003 New Jersey Turfgrass Survey (will be reported)
- 2003 New York Turfgrass Survey (to be sent out)
- 2002 Michigan Turfgrass Survey (to be sent)
- 2002 Georgia Golf Courses and Landscape Maintenance
- 2001 Iowa’s Turfgrass Industry
- 2001 Illinois Green Industry
- 2001 Florida Economic Impact Survey of Nursery & Landscape Industry
- 2000 Kansas State Horticulture Survey
- 2000 Texas Economic Impact Study of Nursery & Landscape Industry
- 2000 Virginia Turfgrass Industry
- 1999 North Carolina Turfgrass Industry
- 1998 Arizona Green Industry Survey
- 1999 Wisconsin Turfgrass Industry Survey
- 1998 Missouri Turfgrass Economic Impact Survey
- 1998 New England Environmental Horticulture Industry
- 1997 Florida’s Environmental Horticulture Industry
- 1997 Oregon Nursery and Greenhouse Industry Survey
- 1997 Louisiana Nursery and Turf Crop Survey
- 1996 Maryland Turfgrass Survey
- 1996 Mississippi Turfgrass Industry
- 1996-97 Washington State Landscape and Nursery Industry Survey
- 1993-97 Industry Information and 1998 Outlook
- 1996 Ohio Nursery Industry Survey
- 1995-96 U.S. Landscape Tree Planting Survey
- 1995 Albuquerque, New Mexico Potential environmental and economic impacts of turfgrass
- 1995 Value of Louisiana’s Green Industry
- 1994 Arizona Green Industry Study
Green Industry/Turf Surveys Cont

- 1994 Kansas Turfgrass Survey
- 1994 North Carolina Turfgrass Survey
- 1994 South Carolina Golf Course Study
- 1994 South Carolina Ornamental Horticulture and Turfgrass Study
- 1992/94 Kansas State Horticulture Survey
- 1993 Economic Contribution of Colorado’s Green Industry
- 1993 Tennessee Nursery and Floriculture Survey
- 1990 Michigan Nursery and Landscape Industry Survey
- 1989 Ohio Turfgrass Survey
- 1989 Kentucky Turfgrass Survey
- 1989 Pennsylvania Turfgrass Survey
- 1987 Oklahoma Turfgrass Survey

- 1986 North Carolina Turfgrass Survey
- 1985 New Jersey Turfgrass Survey
- 1984 Rhode Island Value of Turf to the Economy
- 1978 Oklahoma Turfgrass Survey
Lobbying - Education on the “Economic Importance of Lawn/Landscape Industry”
EVERGREEN FOUNDATION

National Campaign

“To raise the awareness of the environmental, economic and lifestyle benefits of landscapes and promote the significance of those who preserve and enhance green spaces at home, work and play”
“More Information”

National Gardening Survey 2002
1100 Dorset Street
South Burlington, Vermont 05403
Bruce Butterfield  800-538-7476

Environmental & Turf Services Inc
Stewart Z. Cohen 301- 933-4700

US Census Bureau
2002 Economic Census Survey

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