



Redland
SHIRE COUNCIL

**Development of
Redland Shire's Amenity/Lifestyle
Horticulture Industry**

PR Beal (Contractor)

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Introduction

The Amenity Horticulture industry in Queensland contributes over \$1billion to the states economy each year (Fitzgerald & Wilson, 2002). The industry includes sectors such as turf, nursery, cutflowers and foliage, landscape and indoor plant hire. The Redland Park project in Cleveland proposed by the Department of Primary Industries will be a key provider of research, extension, training and industry development in the future to Amenity Horticulture.

The Redland Shire Council Economic Development Group undertook a stocktake survey of proprietors and managers of businesses in Amenity Horticulture in the Shire from 4 March 2003 to 1 April 2003. The purpose of the survey was to better understand the operation of their businesses, their view of future prospects, their concerns and how the Shire Council may be able to assist in the future. Around 120 enterprises were initially identified with 60 being approached and 19 responding.

The results of the survey are now presented. The opportunity exists to further discuss these results and how the Amenity Horticulture Industry, with its component enterprises, may work together in the future.

Method

Sixty Amenity Horticulture enterprises in Redland Shire were contacted by mail and phone. Subsequently 19 respondents, mainly enterprise proprietors, were interviewed personally, over the month of March 2003, using the format of a survey form (Appendix 1).

Results

The results of interviews, together with other relevant data, are provided in Tables 1 – 12. However, the views and estimates documented are sourced from only a small sample of the listed 120 enterprises in the Shire. Thus, information obtained in the survey is presented in a general way and in aggregate for a sector. Also, only general inferences should be made and be a useful basis for further discussion.

Most of the 19 enterprises had fax and e-mail services with 6 having a website (Table 1).

The surveyed enterprises had gross sales \$ value extending across all categories from \$0-100,000 to more than $\$1 \times 10^6$ (Table 2).

The major activities of the surveyed enterprises included production and sale of plants, turf and detached stems, as well as plant hire and supply of landscape materials. Associated activities included value adding, eg. floristry, and the provision of services such as plant breeding, landscape design, construction and maintenance.

Also, the 19 enterprises had 227 employees, including 60 part time, contributing to these activities (Table 3). Fitzgerald and Wilson (2002) have previously estimated Salaries and Wages for 2001 for the Redlands Shire for Amenity Horticulture at \$9.2M of paid labour.

The turf, plant hire and landscape enterprises surveyed essentially exploited local markets (householders, businesses, developers, etc) in the Shire and also in SE Queensland. For cutflower and nursery sectors, interstate wholesale markets, in addition to local (Shire) and Queensland markets, were of major importance. A small but significant overseas market for the nursery sector was identified. The main competitors for each of these markets were similar enterprises with related products and services located variously in the Shire, in Queensland, other States and overseas (Table 4).

Fitzgerald & Wilson (2002) previously documented in a statewide survey that 31% or 28 businesses in the Redlands Shire identified that they export interstate (mainly nursery and cutflower) and 3 businesses exported overseas (Table 11). Also, the Queensland nursery sector sent the greatest quantity interstate (Table 12).

The type and source of supply of individual goods and services to individual enterprises was diverse and very dependent on the specific circumstances even within the same sector (Table 5). Surveyed enterprises generally endeavoured to purchase some materials and services locally, although point of origin or manufacture could still be external to the Shire. Many enterprises, but not all, preferred to control activities, such as transport, in-house. A wide range of consumables (propagules, media, pots and trays, fertilisers and pesticides, boxes and wraps etc.) with individual estimated costs of \$1x10³ to \$1x10⁶ were commonly sourced from other parts of Queensland, interstate and even overseas. Some of the services offered by enterprises to final consumers (eg design and construction) have been previously described in Table 3 with some services offered to related enterprises by agreement (eg sterilisation of containers) described in Table 5.

Limited opportunities in outsourcing were identified by surveyed enterprises as existing (Table 6). Cost control was generally believed better with in-house activities. Specialised services involving propagation and accounting were worth consideration. Possible outsourcing opportunities were reviewed from time to time by many enterprises by examining comparable cost effectiveness of any change from routine.

Some possible import replacement opportunities were identified (Table 7). Substantial quantities of consumables of considerable value (Table 5) including pots and trays, boxes and wraps, media etc and some specialised services are presently sourced outside the Shire and state.

Some opportunities with plant breeding and in-house propagation have already been undertaken. Local (Shire) sourcing or manufacturing would need appropriate demand, economics of scale and cost effectiveness for supplier and enterprise. Such opportunities would need evaluation by an appropriate multi enterprise group.

The most important positive factors in success, identified by surveyed enterprises in the Shire, was the excellent location, ready access to road and air transport, infrastructure and proximity to local (an expanding Shire), Queensland and interstate markets (Table 8-1). Other factors identified ranged from frost-free climate, availability of water, support from Plant Quarantine and Crop Health (DPI) and from the Redland Shire for Green and Grow Expo, as well as specialisation, excellent quality control etc.

The major negative factors in success identified from surveyed enterprises in Amenity Horticulture were lack of suitable land for expansion, constraints to use, inappropriate Council support and limited water supplies (Table 8-2). Other negative factors identified included problems with labour supply and skills and financial issues (cost of fuel, the GST tax and the rates burden) etc.

Clustering or networking opportunities of major interest, identified by surveyed enterprises in Amenity Horticulture in the Redlands Shire, included research, training, purchasing (and tendering) and advertising and marketing. Other clustering opportunities identified included improving the Council's understanding of the value of Amenity Horticulture in the Shire and that the Green and Grow Expo should have continued support (Table 9).

The major priority identified by surveyed enterprises to improve the Amenity Horticulture industry in the Redland Shire was in raising the profile of Amenity Horticulture so that its importance to community and Council alike is well understood. The means suggested included forming a multi-sector group, improving communication, encouraging the Council to be more flexible and responsive, incentives being developed in the Shire etc (Table 10). Other priorities included improved education (of employees and customers), continued R&D and use of more efficient technologies, improving standards and quality control etc.

Conclusions

- Amenity Horticulture enterprises in the Redland Shire make a major contribution, based on \$ value of sales, to the local economy.
- These enterprises supply the local community and also the state and export markets with a diverse range of plants, plant products as well as a range of related services.
- The Amenity Horticulture industry in the Shire is a significant provider of employment.
- Possible outsourcing opportunities may exist for Amenity Horticulture enterprises in the Shire. Such opportunities seem well worth further evaluation.

- Possible import replacement opportunities for enterprises in the sectors seem worth further investigation. To further realise such opportunities, details of aggregate demand for specific consumables and services need to be confirmed and multi enterprise cooperation initiated.
- Many diverse clustering opportunities of interest were identified by surveyed enterprises in the Amenity Horticulture industry in the Shire. These involved research, finance, training and interaction of the industry with Council and others. These possible opportunities seem well worth pursuing further.
- The formation of a multi-sector Amenity Horticulture industry group in the Redland Shire seems worth strong consideration. It may be the appropriate means of better defining, communicating and resolving issues and concerns of local enterprises in this industry.

Acknowledgments

My thanks to the enterprise managers and proprietors who gave of their time and their views for this survey. I acknowledge the continuing assistance to me from Mr Andrew Harvey, Manager, Economic Development Group, Redland Shire Council in conducting the survey. My appreciation also to Ms Glenda Burns for typing the report.

Table 1: Business details of 19 surveyed enterprises in Amenity Horticulture in the Redland Shire

| | |
|------------------------------------|-----------|
| Total Number of Enterprises | 19 |
| No with Fax | 16 |
| No with E-mail | 13 |
| No with a Website (URL) | 6 |

Table 2: Turnover per annum of 18 surveyed enterprises in Amenity Horticulture in the Redland Shire (\$)

| Turnover | 0-100,000 | 100,000-250,000 | 250,000-500,000 | 500,000-1x10⁶ | >1x10⁶ |
|-----------------|------------------|------------------------|------------------------|---------------------------------|-----------------------------|
| Total No | 3 | 3 | 5 | 1 | 6 |

Table 3: Business profile of 19 surveyed enterprises in Amenity Horticulture in the Redland Shire

| Commercial Sector * | Main Activity | Other Activities ** |
|---------------------------------|---|---|
| Turf | Produce turf | Lay turf |
| Nursery | Produce wholesale container grown plants (plugs/cells, tubes to advanced) | Produce plants for retail sale Supply, garden accessories and hardware. Undertake plant breeding |
| Cutflowers & Foliage | Produce wholesale cutflowers and foliage | Produce from and market for other producers for retail sale Value add with floral arrangement Supplement with other crops |
| Landscape | Supply landscape materials, artefacts, structures and plants | Produce plants. Arrange or directly undertake design and construction |
| Plant Hire | Supply and maintain indoor plants on a hire basis | Produce plants |

* A total of 19 enterprises involving 227 employees, including 60 part-time. May include working proprietors. Part time varies with demand.

** Advice may be provided free or on a contractual basis.

Table 4: Markets for 19 surveyed enterprises in Amenity Horticulture in the Redland Shire.

| Commercial Sector | Customers/Locations | Competitors |
|---------------------------------|---|---|
| Turf | – Mainly householders, developers and builders in the Shire | Other producers in the Shire and SE Qld |
| Nursery | – Householders, developers and landscapers in the Shire – Substantial to wholesale and retail nurseries and chains in Qld – Substantial to national networks, nurseries, chains and garden centres interstate – Some to international networks overseas | – Other wholesale nurseries in the Shire – Other wholesale nurseries in the State – Other producers and wholesalers in Qld, NSW, VIC and WA – Other producers in Europe, Japan and the United States |
| Cutflowers & Foliage | – Some to wholesalers and retail shops and some florists in the Shire – Substantial to wholesalers and retail shops in Qld – Substantial to wholesalers in NSW, Victoria and Tasmania in winter – Minimal overseas | – Other growers in the Shire – Other growers in winter in Qld – Southern wholesalers & growers in immediate pre- and post- winter – Importers ex overseas eg from India and Kenya |
| Landscape | – Mainly to householders, trade and landscapers in the Shire – Some to householders and trade in SE Qld and other parts of the state | – Other landscapers nearby in the Shire – Other landscapers |
| Plant Hire | – Mainly to clubs and offices in the Shire and in Brisbane | – Other indoor hirers in SE Qld |

NB: Of businesses in the Shire 31% (28) export interstate and 3 businesses export overseas, according to the 2001 survey (Fitzgerald & Wilson, 2002)

Table 5: Supply Chain of 19 surveyed enterprises in Amenity Horticulture in the Redland Shire.

| Commercial Sector | Materials Locally Made and Purchased | Local Services Purchased | Principal Imported Materials (some examples cost & source per year) | Services Offered |
|---------------------------------|--|---|--|--|
| Turf | <ul style="list-style-type: none"> - Poultry manure - Fuel, tyres, spare parts | <ul style="list-style-type: none"> - Water, power, accounting - Vehicle maintenance (SE Qld etc) - Soil analysis (SE Qld) | <ul style="list-style-type: none"> - Fertilisers (SE Qld) \$1x10⁴ approx. - Other grass species (SE Qld) \$1x10⁵ | <ul style="list-style-type: none"> - Laying turf |
| Nursery | <ul style="list-style-type: none"> - Fuel - Seedlings | <ul style="list-style-type: none"> - Water, power, gas - Legals & accounting (SE Qld etc) - Pest identification (GrowHelp) | <ul style="list-style-type: none"> - Seeds, seedlings, tissue cultures etc (SE Qld, interstate, Europe & Japan) \$1x10³ to \$1x10⁶ - Media & components (SE Qld, overseas) circa \$1x10⁴ - Fertilisers & pesticides (SE Qld, interstate) circa \$1x10³ to \$1x10⁴ - Pots, trays & labels (mainly interstate) \$1x10⁴ to \$1x10⁵ | <ul style="list-style-type: none"> - Plant breeding and development - Sterilisation of containers - Branded product to licensed growers - Occasional advice on establishment and maintenance |
| Cutflowers & Foliage | <ul style="list-style-type: none"> - Cuttings | <ul style="list-style-type: none"> - Power, phone & labour - Nutritional diagnosis (DPI) - Pest identification (DPI) | <ul style="list-style-type: none"> - Cuttings, other plants (interstate, Israel and Japan) \$1x10³ to \$1x10⁴ - Boxes and media (SE Qld) - Fertilisers and pesticides (in Shire, origins external) \$1x10⁴ approx - Boxes, wraps, sleeves (local origin, imported ex interstate & overseas) to \$1x10⁵ approx | <ul style="list-style-type: none"> - Growing schedules to associated growers - Bunching and occasional displays |

Table 5: Supply Chain of 19 surveyed enterprises in Amenity Horticulture in the Redland Shire (continued)

| Commercial Sector | Materials Locally Made and Purchased | Local Services Purchased | Principal Imported Materials (some examples cost & source 1 year) | Services Offered |
|-------------------|---|--|---|---|
| Landscape | <ul style="list-style-type: none"> - Poultry manure - Gravels, sand | <ul style="list-style-type: none"> - Vehicle maintenance - Labour | <ul style="list-style-type: none"> - Seed, plants (SE & N Qld & interstate) \$1x10⁴ to \$1x10⁵ - Plants, trays (Vic etc) \$1x10⁴ approx - Soils, mulch, gravel, bricks (SE Qld & NSW) - - Fertiliser, chemicals (SE Qld, interstate) \$1x10³ - \$1x10⁴ approx - Timber (SE Qld & NSW) \$1x10⁴ approx | <ul style="list-style-type: none"> - Design on occasion - Redirecting for design and construction |
| Plant Hire | <ul style="list-style-type: none"> - Potting mix - Seedlings | <ul style="list-style-type: none"> - Consultancies re mixes & fertigation | <ul style="list-style-type: none"> - Seedlings (local & Qld) approx \$1x10⁴ | <ul style="list-style-type: none"> - A care package for indoor plants |

NB: Some materials purchased locally (in Shire) originate outside the Shire.

Table 6: Outsourcing Opportunities of 19 surveyed enterprises in Amenity Horticulture in the Redland Shire

| Commercial Sector | Possible Opportunities | Comments |
|---------------------------------|--|--|
| Turf | – Limited opportunities | – Transport is already outsourced |
| Nursery | <ul style="list-style-type: none"> – Additional use of external specialist propagation and growing on – External evaluation & characterisation of cultivars – Buying tubestock in to grow or pot on | <ul style="list-style-type: none"> – Many activities are preferred in-house as cost may be well controlled – Opportunities depend on supplier competency and lower costs |
| Cutflowers & Foliage | – Restricted opportunities | – Stock propagation is preferred on-farm to control costs and reduce disease risk |
| Landscape | <ul style="list-style-type: none"> – Propagation of selected lines in locations with faster growth – Accounting – Few opportunities in reality | <ul style="list-style-type: none"> – Preference may be for self sufficiency – Prefer to control transport – Suppliers with lower costs are already in place |
| Plant Hire | – Propagation | – Cost effectiveness is important |

Table 7: Import Replacement Opportunities of 19 surveyed enterprises in Amenity Horticulture in the Redland Shire

| Commercial Sector | Possible Opportunities | Comments |
|---------------------------------|---|---|
| Turf | <ul style="list-style-type: none"> – Foliar analyses are sourced from interstate | <ul style="list-style-type: none"> – Species bought in are not in great demand and not cost effective to grow locally |
| Nursery | <ul style="list-style-type: none"> – Labels, plastic pots and trays (currently sourced interstate) – Bar codes, some fertilisers – Plant breeding has been initiated | <ul style="list-style-type: none"> – Local manufacture needs to be cost competitive – May be useful to cost imported items and freight component |
| Cutflowers & Foliage | <ul style="list-style-type: none"> – Boxes, sleeves and wraps – Specified sleeves (essentially overseas origin) | <ul style="list-style-type: none"> – Already conduct own propagation – Little opportunities already apparent |
| Landscape | <ul style="list-style-type: none"> – Plastic pots and trays (interstate) – Bags, fancy pots (outside Shire) – Gravels, sands, barks if local source known | <ul style="list-style-type: none"> – Lot of material already bought locally – Already aim at self sufficiency – Will continue to evaluate opportunities – Useful to consider purchases if freight component reduced |
| Plant Hire | <ul style="list-style-type: none"> – Not identified | |

Table 8-1: Positive factors in success for 19 surveyed enterprises in the Redland Shire

| Commercial Sector | Wider Perception | Other Perceptions |
|---------------------------------|---|--|
| Turf | <ul style="list-style-type: none"> – Good location, close to markets | |
| Nursery | <ul style="list-style-type: none"> – Good location, frost free, access to road & air transport – Good infrastructure – Specialisation | <ul style="list-style-type: none"> – Availability of skilled labour – Availability of plant quarantine & CropHealth – Excellent quality control – Well managed information technology – Good power supply |
| Cutflowers & Foliage | <ul style="list-style-type: none"> – Good location, close to markets, transport & infrastructure – Adequate water supplies | <ul style="list-style-type: none"> – Specialisation – Excellent quality control |
| Landscape | <ul style="list-style-type: none"> – Good location, close to markets – Support of Redland Shire Council for Green and Grow Expo – Support of DPI for Amenity Horticulture | <ul style="list-style-type: none"> – Great potential for tourism – Specialisation – Quality control – Power of chain, range of products, centralised administration – Plentiful water |
| Plant Hire | <ul style="list-style-type: none"> – Good location, proximity of markets (Brisbane) and infrastructure | |

Table 8-2: Negative factors in success for 19 surveyed enterprises in the Redland Shire

| Commercial Sector | Wider Perception | Other Perceptions |
|---------------------------------|---|---|
| Turf | | <ul style="list-style-type: none"> – Lack of land for expansion – Lack of skilled labour – Inadequate water – Conflict of land use with adjacent households |
| Nursery | <ul style="list-style-type: none"> – Limited water supply – Limited land for expansion | <ul style="list-style-type: none"> – Cost of fuel for transport – GST burden – Rates burden not related to land use – Lack of specific labour skills – Sunday markets etc – Problem of fire ants |
| Cutflowers & Foliage | <ul style="list-style-type: none"> – Limited land available, limits to its use, conflicts with residential development, unresponsive bureaucrats – International imports, plateaued prices | <ul style="list-style-type: none"> – Lack of water – Bad debts – Fire ants – Lack of labour at harvest |
| Landscape | <ul style="list-style-type: none"> – Shire Council slow to approve development, conflicts between Amenity Horticultural business and residential development | <ul style="list-style-type: none"> – Lack of water – Lack of skilled labour |
| Plant Hire | <ul style="list-style-type: none"> – Lack of suitable land, conflicts with residential development close to farms/nurseries. Council with unsatisfactory response | <ul style="list-style-type: none"> – Water supplies inadequate |

Table 9: Clustering opportunities for 19 surveyed Amenity Horticulture enterprises in the Redland Shire

| Commercial Sector | Wide Interest | Other Interest | Other |
|---------------------------------|---|--|---|
| Turf | | <ul style="list-style-type: none"> – Purchase, training, joint ventures, research, advertising, marketing | |
| Nursery | <ul style="list-style-type: none"> – Training (personnel management) – Research (specific crops) – Marketing – Advertising (new markets) | <ul style="list-style-type: none"> – Tendering – Purchasing (costs eg. gas & peat) | <ul style="list-style-type: none"> – Education of the Redland Shire Council is a high priority – Green & Grow should be supported |
| Cutflowers & Foliage | <ul style="list-style-type: none"> – Purchasing (improve cost control) | <ul style="list-style-type: none"> – Research (already per QFGA) – Advertising – Marketing | <ul style="list-style-type: none"> – Opportunities may be limited |
| Landscape | <ul style="list-style-type: none"> – Training (use of forklift, communication, species identification) – Purchasing – Advertising – Marketing | <ul style="list-style-type: none"> – Joint Ventures – Tendering | <ul style="list-style-type: none"> – An increased focus on developmental issues with a changing enterprise mix |
| Plant Hire | | <ul style="list-style-type: none"> – Purchasing – Research (approved chemicals, application rates and pest identification for indoor plants) | |

Table 10: Improving the Amenity Horticulture Industry in the Redland Shire

| Commercial Sector | Main Priorities for Improvement | Other Priorities |
|---------------------------------|---|--|
| Turf | <ul style="list-style-type: none"> – Form an Amenity Horticulture group | <ul style="list-style-type: none"> – Continue R&D with DPI Turf group – Improve customer education – Improve employee training |
| Nursery | <ul style="list-style-type: none"> – Closer relations between Amenity Horticulture & RSC – Continued support of Green & Grow – Develop incentives for Amenity Horticulture in Shire eg. land bank, improve water availability, rates related to use not value | <ul style="list-style-type: none"> – Maintain high quality of commodities/services – Upgrade facilities, increase mechanisation – Better educated customers and nursery industry – Curtail/disallow plant etc. sales at Sunday markets etc |
| Cutflowers & Foliage | <ul style="list-style-type: none"> – Strengthen profile and status of Amenity Horticulture in Shire eg. incentives for development, flexible approach by Council re environmental matters, products should be readily available for purchase – Identify land/locations which can be used in long term by Amenity Horticulture (ie zoned) | <ul style="list-style-type: none"> – Improve marketing – Identify new crops – Improve control of pests and diseases – Resolve or mitigate bad debt problems and tight margins |
| Landscape | <ul style="list-style-type: none"> – Encourage the Council to be more responsive to Amenity Horticulture concerns, improve access to land for expansion – Encourage the different sectors in Amenity Horticulture to work together for common aims | <ul style="list-style-type: none"> – Establish higher standards in training, products and services – Increase product diversity – Continue to control fire ants – Be market driven |
| Plant Hire | <ul style="list-style-type: none"> – Develop better communication between Industry and local government (not big stick) – The Council should develop long term appropriate incentives which will be supportive of Amenity Horticulture in the long term | <ul style="list-style-type: none"> – Accreditation/registration of enterprises by RSC should be beneficial |

Table 11: Gross sales, number of businesses responding & involved in exports for Amenity Horticulture in the Redland Shire (Fitzgerald & Wilson, 2002)

| Commercial Sector | No. of Businesses Responding | Gross Sales (\$M) | No. of Businesses with Exports | |
|----------------------|------------------------------|-------------------|--------------------------------|------------|
| | | | Overseas | Interstate |
| Turf | - | - | - | - |
| Nursery | 37 | 25.8 | 2 | 20 |
| Cutflowers & Foliage | 11 | 7.3 | 0 | 4 |
| Landscape | 29 | 2.4 | 0 | 1 |
| Plant Hire | 2 | 0.2 | - | - |
| Other | 6 | 3.9 | 1 | 3 |
| TOTAL | 85 * | 39.6 | 3 | 28 |
| | | 18.7 ** | | |

* Survey rate 78% (109 contacts, 85 respondents) with data not adjusted for survey rate

** Gross sales data adjusted for double counting

Attachment to Table 11: Aspects of the Amenity Horticulture industry in the Redland Shire (Fitzgerald & Wilson, 2002)

- Nursery sector \$25.8m & flowers \$7.3m gross sales
- 60% of businesses were established 1991-2001
- 75% of businesses expected an increase in their operations in the next 5 years
- 22% of managers had University level qualifications and 11% Assoc. Diplomas
- 5.5% of employees had University qualifications and 22.7% Assoc. Diplomas
- Total salaries & wages 2000/2001 was estimated at \$9.2m with nursery \$5.6m
- Approx 31% or 28 businesses export interstate and 3 businesses export overseas

Table 12: The economic value of Queensland's (and Redland Shire's) Amenity Horticulture

| Sector | Survey Response | | Whole of industry estimate | | | Redland Shire (Gross sales \$M – not adjusted) |
|-----------------------|-----------------------------|-------------------------|-----------------------------------|-------------------------|-----------------------|---|
| | No. in initial survey | No. completed (%) | 2000/2001 (Gross sales \$M) | Exports | | |
| | | | | Inter state (\$M) | Over seas (\$M) | |
| Commercial | | | | | | |
| Turf | 152 | 59 | 50 | 0.75 | 0 | - |
| Nursery | 1292 | 66 | 477 | 69 | 2.5 | 25.8 |
| Cutflowers & Foliage | 464 | 60 | 126 | 19 | 13 | 7.3 |
| Landscape | 1717 | 62 | 336 | 11 | 3.5 | 2.4 |
| Plant Hire | 66 | 71 | 12 | 1 | 0 | 0.2 |
| Other | 314 | 60 | 55 | 3 | 0.4 | 3.9 |
| TOTAL | 4005 | 63 av | 1056 (782 *) | | | 39.6 |
| Non Commercial | | | | | | |
| Local Government | 127 | 86 | } 223 | | | |
| Golf Course | 200 | 36 | | | | |
| TOTAL | 327 | 56 | | | | |
| GRAND TOTAL | 4332 | 62 | (1005 *) | | | (18.7 *) |

* Adjusted

Source: Fitzgerald & Wilson, 2002

Attachment to Table 12: Major inferences ex Qld Survey (Fitzgerald & Wilson, 2002)

- > 80% businesses owner managed, 38% established in the last 5 years
- 76% businesses have \$200,000 and less gross sales
- > 66% businesses are in Brisbane & Moreton statistical areas
- 47% of cutflower and foliage sector said Amenity Horticulture was not the main source of income
- 68% of businesses surveyed believed gross sales would increase in the next 5 years
- nursery sector sent the largest quantity of product interstate (68% total industry interstate trade and 14.5 % of total nursery sector sales)
- cutflower and foliage had largest overseas exports (66% of total amenity exports and 10% of total flower and foliage sales)
- 80% of enterprises paid wages and salaries of \$100,000 and <

(August 2001 statewide survey)