AmericanHort

AmericanHort Salary and Benefits REPORT

2023

The **AmericanHort 2023 Salary & Benefits Report** provides a detailed analysis of key compensation and benefits related statistics for executive level positions in the horticultural industry. The results are based on confidential surveys submitted to Industry Insights, Inc., from 239 organizations representing nearly 12,000 employees.

The **AmericanHort 2023 Salary & Benefits Survey** was compiled, tabulated, and analyzed by Industry Insights, Inc. (www.industryinsights.com), an independent professional research and analytics firm that specializes in conducting financial operating surveys, compensation studies, market assessment surveys, customer satisfaction research, educational programs, and other forms of customized research for associations.

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ABOUT THIS REPORT

The **AmericanHort 2023 Salary & Benefits Report** represents the most complete, accurate, and up-to-date salary and benefits data in the industry. This report is designed to allow users to easily compare compensation levels and benefit policies with their peers.

HOW THE TABLES ARE ORGANIZED

The tables in this report are organized to include a number of important findings for each relevant "grouping" of similar company types. Detailed tables can be found in the Detailed Results and Compensation Tables sections. The Detailed Results utilize the same data set, but it is broken into the following data aggregations:

ALL FIRMS

Company's Business Segment
- Greenhouse Grower
- Nursery Grower
- Retail Garden Center
- Other

Net Sales
- Less than $1,000,000
- $1,000,000 to 4,999,999
- $5,000,000 to $14,999,999
- More than $15,000,000

Region (HQ Location)
- Northeast
- Midwest
- South
- West
- Canada

The following job titles were included in the compensation portion of the survey and listed in the detailed compensation tables individually. If there was not sufficient data to show a job title, it will not appear in the detailed compensation tables.

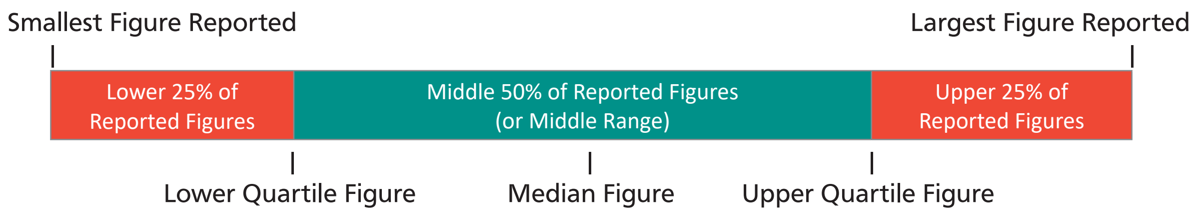
SURVEY JOBS	
EXECUTIVE	
Owner	Head of Finance (CFO, VP, Controller)
CEO/President	Head of Sales/Marketing (VP, Director, Manager)
Head of Operations (Coo, VP, Manager)	Head of Human Resources (VP, Director, Manager)
OFFICE STAFF	
Office/Administrative Manager	Sales Representative
General Manager	Accounting Staff
Sales Manager	Administrative Staff
GROWING & RETAIL STAFF	
Head Grower	Cashier
Section Grower	Sales Associate
Grower Junior level (0-2 years)	Buyer
Grower 2nd level (3-5 years)	Garden Center Manager
Grower Senior level (6+ years)	Merchandiser
General Labor	Merchandise Manager
Crew Leader	Receiving Clerk
Department Manager	Landscape Foreman
Field Supervisor	Delivery Driver
Truck Driver	

INTERPRETING THE NUMBERS

Many of the results included in this study are reported as both medians and arithmetical averages or means. Unlike the mean, the median is not distorted by a few unusually high or low values that may exist in the sample due to special circumstances. The "median" value represents the mid-point of the data for a particular measure, with one-half of responding organizations reporting figures above it and one-half below. Each median was computed independently based on the participants that reported for that item. As a result, mathematical relationships do not always exist when different data points are used together in a calculation.

As readers compare their compensation information to that of the industry, it is important to remember that the statistics published in this report should be regarded as guidelines rather than absolute standards. Since companies differ depending upon their location, size, and other factors, any two companies may offer their employees a reasonably attractive compensation package and yet those offers may be very different. For example, duration of employment and nature of prior experience will obviously influence the compensation offered to a particular individual. Thus, a deviation between any one company's figures and a number appearing on a table in this report is not necessarily good or bad; it is merely an indication that additional scrutiny may be warranted.

Throughout the report, an "**" indicates that there was insufficient response data to provide a meaningful statistic for that measure, or that one company provided more than 50% of the data. A sample size of five was required to show average, median, 25th, and 75th percentiles. A notation (1) is made if one company provided more than 30% of the data.



THE ECONOMY

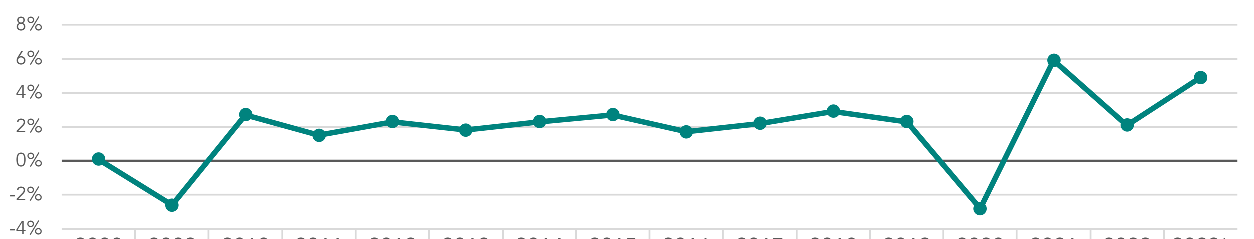
Before analyzing compensation information for any industry, it is important to understand the performance of the overall economy. This section of the report will examine several indicators which are typically correlated with compensation levels and their corresponding trends. It is important to note that these correlations may not apply to every geographic location or individual organization. However, these indicators do provide sound information and their projections will serve as a good gauge for compensation estimates moving forward.

Due to unprecedented government stimulus packages, the economic recovery from the pandemic has exceeded most expectations and the economic growth continued its strong pace into 2021. It was another "rollercoaster" year in 2022 but for different reasons than we had for 2021. As we managed to get through the ups and downs of continued COVID related issues in 2021, the supply chain and inflation impacts beginning in late 2021 bled over into 2022 in full force. The supply chain issues coupled with the unprecedented government stimulus packages of 2020 and 2021 only added fuel to the inflationary fire. We now have a Fed that is steadfast in slowing the economy—raising interest rates 11 times since March 2022. Banking concerns and several geopolitical issues only add to a larger list of uncertainties for the next few years. How these uncertainties play out will determine whether we can have consistent long-term growth or whether we will hit a short or prolonged recessionary period.

Economic Growth

Real gross domestic product (GDP) decreased each of the first two quarters of 2022 but was able to record stronger growth in the second half of the year to end up 2.1% for 2022. GDP has increased at an annual rate of 4.9% as of the third quarter of 2023.

Gross Domestic Production (GDP) Growth Rate



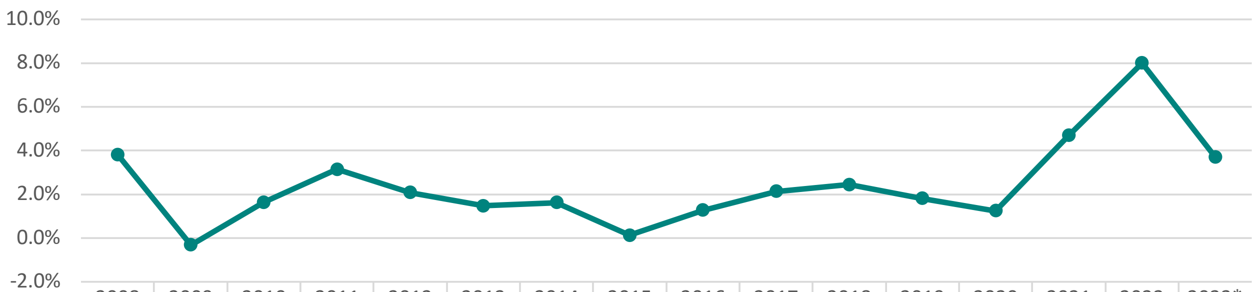
2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*
0.1%	-2.6%	2.7%	1.5%	2.3%	1.8%	2.3%	2.7%	1.7%	2.2%	2.9%	2.3%	-2.8%	5.9%	2.1%	4.9%

Source: Bureau of Economic Analysis
**As of Q3 2023*

Inflation

U.S. inflation, measured by the Consumer Price Index (CPI), was relatively passive in the 2010's (prior to the COVID-19 pandemic), due to modest economic growth and lower commodity prices. Unfortunately, the government stimulus injected into the economy plus a strained supply chain and tight labor market has created an environment of strong demand far outpacing supply. With the CPI reaching its highest levels since the 1980s, the Fed has firmly entered a monetary tightening cycle with seven rate hikes in 2022. There have been four additional rate hikes in 2023. Although we are starting to see disinflationary improvements through 2023, it is anticipated that supply chain issues, a tight labor market, and inflationary pressures will continue to be present through the remainder of the year.

Inflation (Consumer Price Index) % Change vs. Prior Year



2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*
3.8%	-0.3%	1.6%	3.1%	2.1%	1.5%	1.6%	0.1%	1.3%	2.1%	2.4%	1.8%	1.2%	4.7%	8.0%	3.7%

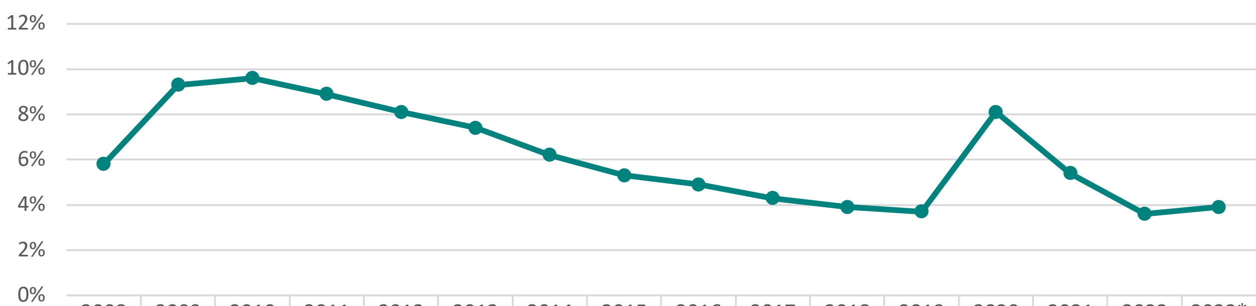
Source: Bureau of Labor Statistics
**As of October 2023*

Unemployment

Following the pandemic induced spike in unemployment, the labor market has steadily shown strong improvements. The unemployment rate has essentially reached pre-pandemic levels. Labor demand continues to outpace labor supply. As of July 2023, there are more job openings than there are unemployed people seeking employment (1.4 job openings per unemployed person).

The unemployment rate only reflects the percentage of those actively seeking employment who are unemployed. It does not account for anyone who has decided to stop seeking employment due to difficulty finding a job. This means that the reported unemployment rates are likely artificially deflated from real unemployment levels. Another useful employment measure is the labor force participation rate, which tracks the percentage of the population that is either employed or actively seeking employment. From 2002 – 2008, the labor force participation rate was around 66%. From 2014 – 2019, labor force participation fell to a range between 62%-63%, the lowest since the 1970s. In the peak of the pandemic, April and May 2020 both reported participation rates below 61%. The participation rate has been improving and has remained over 62% for all of 2022 and reached a post pandemic high of 62.8% in August 2023—though this is still below the pre-pandemic level of 63.4% in February 2020.

Unemployment Rate

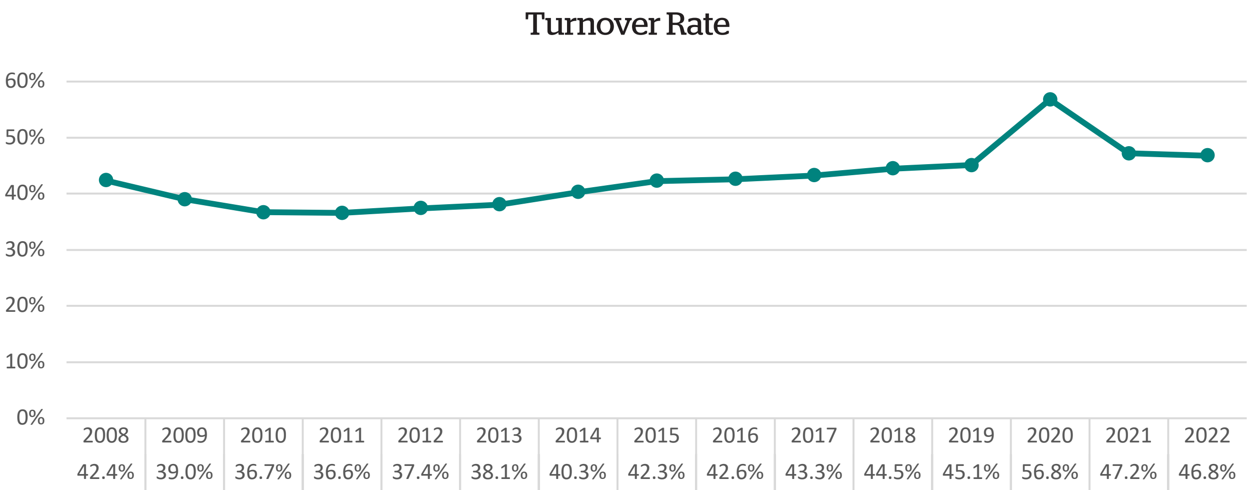


2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*
5.8%	9.3%	9.6%	8.9%	8.1%	7.4%	6.2%	5.3%	4.9%	4.3%	3.9%	3.7%	8.1%	5.4%	3.6%	3.9%

Source: Bureau of Labor Statistics
**As of October 2023*

Turnover Rates

The COVID-19 pandemic of 2020 brought record turnover rates as millions of employees were laid off/furloughed. Post pandemic, the demand for labor has far outpaced labor supply which has created an environment of increased wage pressures. In what many have termed “the Great Resignation,” 2021 and 2022 reported quit rates of over 30% nationally.

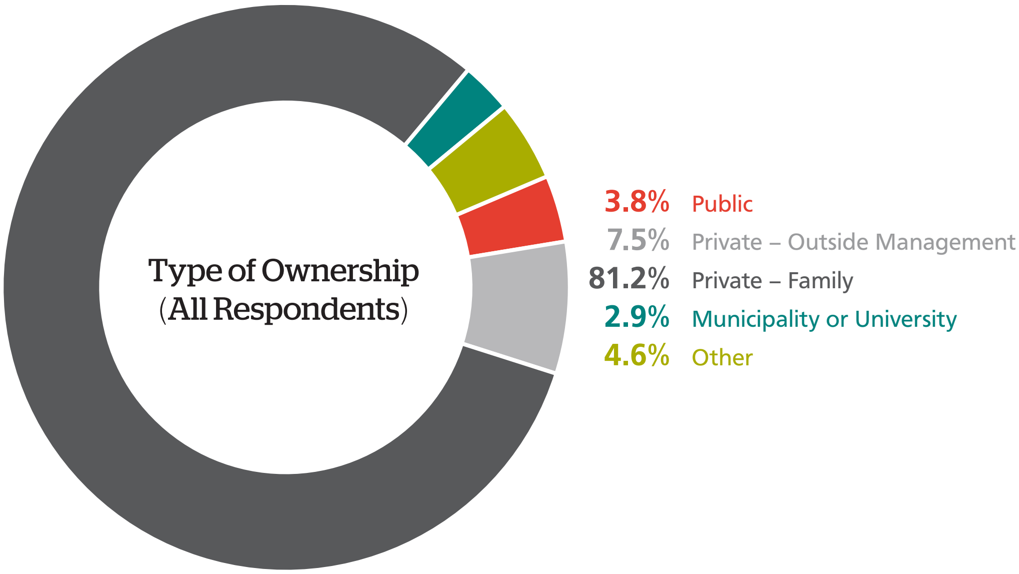


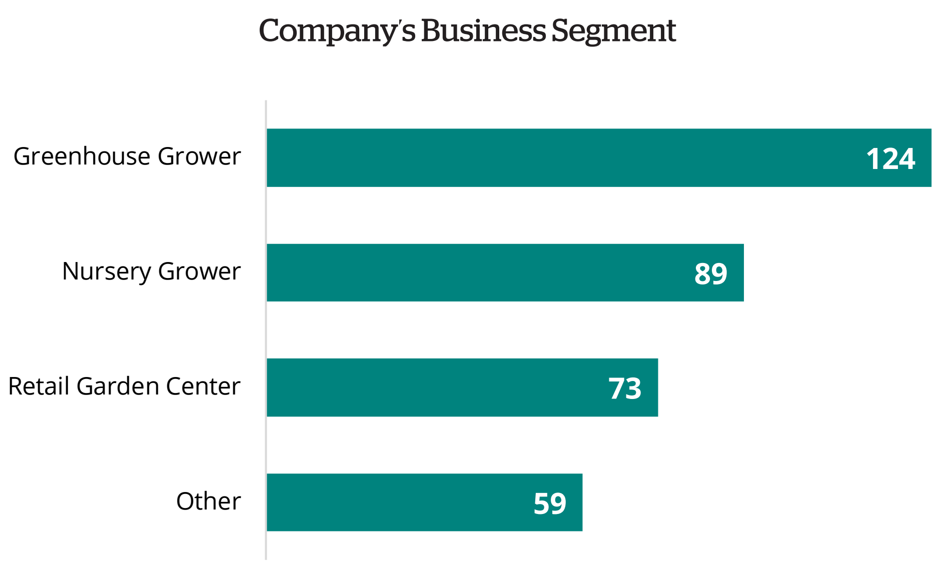
Source: Bureau of Labor Statistics
**As of October 2023*

Summary

As the recovery has accelerated faster than most had thought, strong demand continues to strain the labor markets. There are various downside risks that could negatively impact the economy in 2023 and the coming years—new variants of COVID or other infectious diseases, supply chain issues, labor shortages, wage pressures, tighter fiscal policies, and geopolitical events, just to name a few. The Fed is trying to “thread the needle” with a tightening monetary policy that will contract inflation back to its desired 2% level while also providing a “soft landing” that allows for continued moderate growth in the economy. Despite the aforementioned risks, the economy is demonstrating resilience and steadiness, albeit with signs of slight cooling. As we’ve progressed through 2023, there appears to be an increased likelihood that the Fed may successfully achieve the harmonious balance they desire for price stability and maximum sustainable employment.

RESPONDENT PROFILE

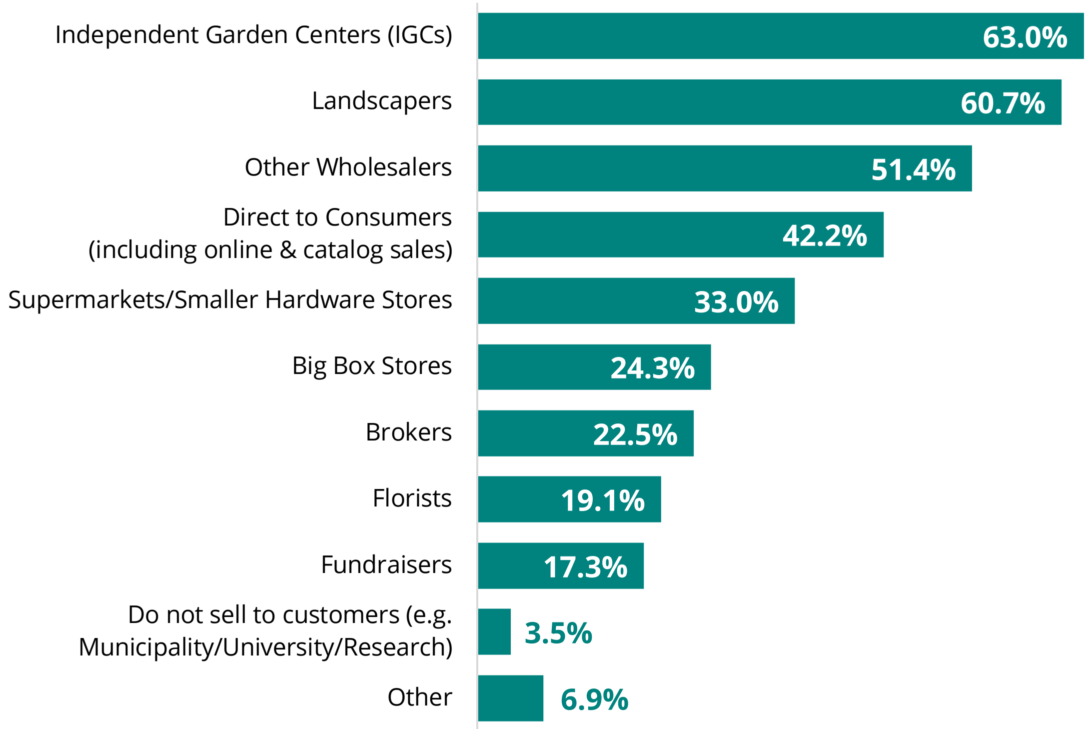




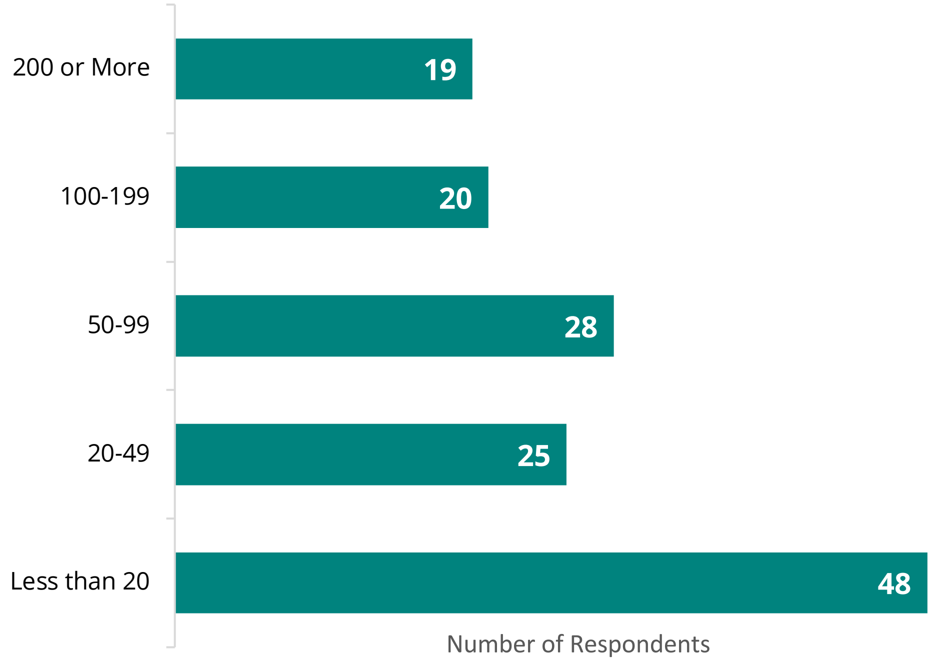
Participants could select more than one.

Annual Sales Volume

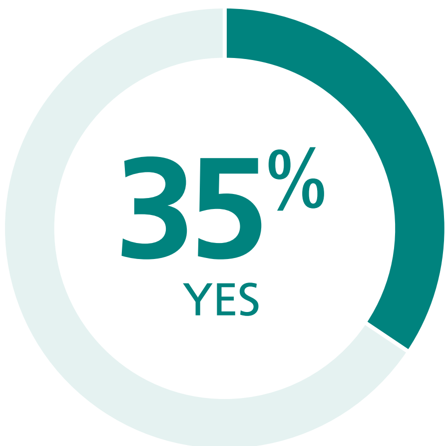
Sold to



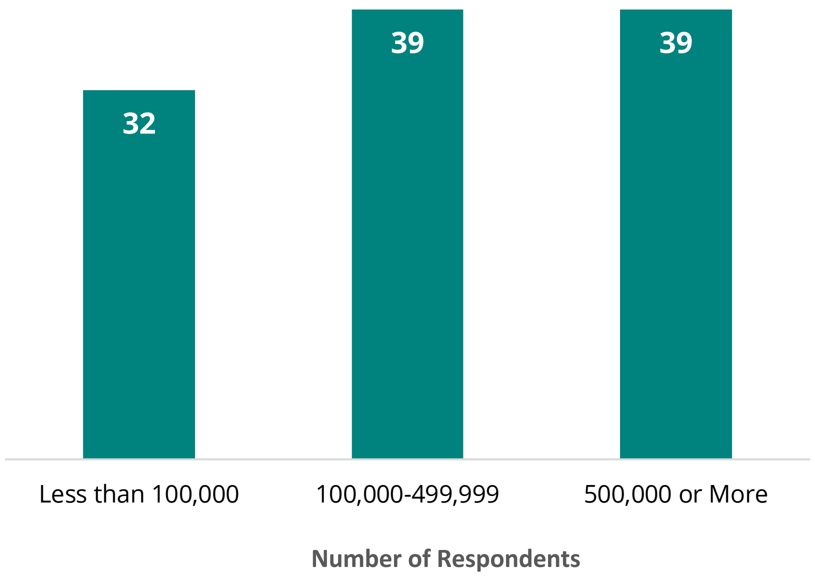
Number of Full Time Employees



Use either H-2A or H-2B Program to Fill Some of Workforce

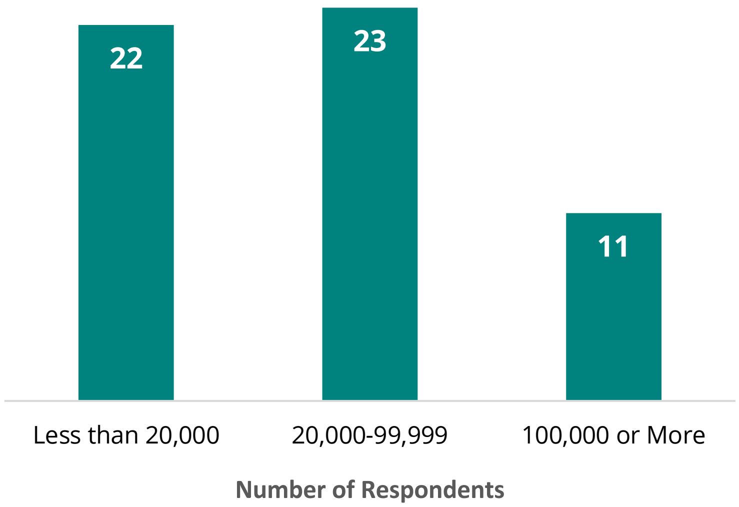


Size of Production Area (sq ft)

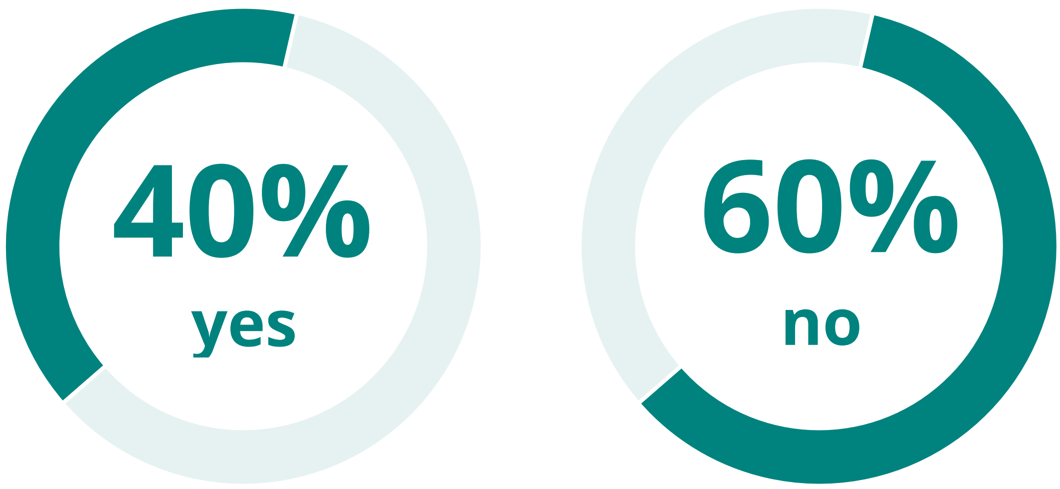


Size of Field Production Area (acres)

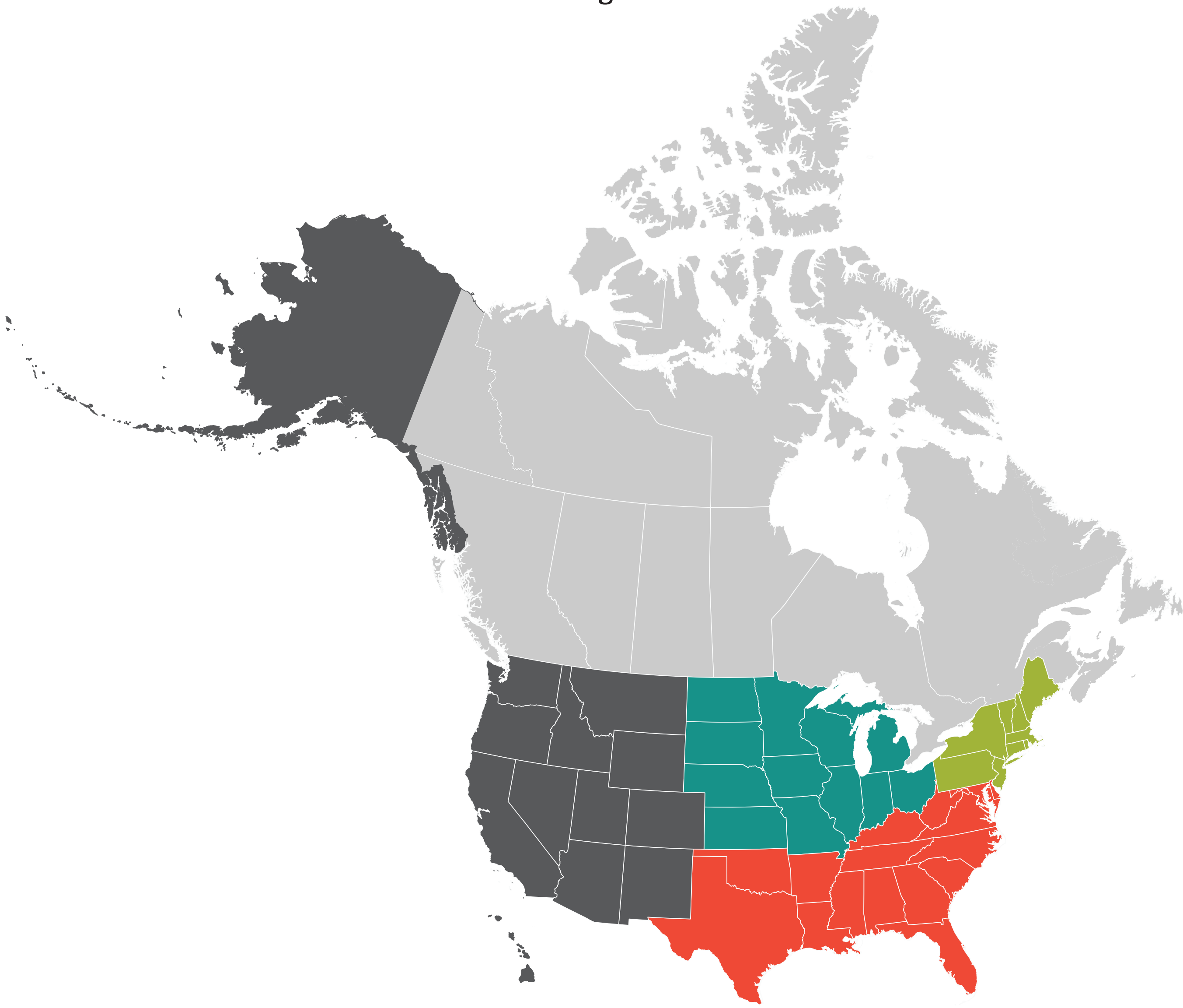
Size of Retail Area (sq ft)



Organization has a Landscape Division



Region



28 Northeast (CT, ME, MA, NH, NJ, NY, PA, RI, VT)

88 Midwest (IL, IN, IA, KS, MI, MN, MO, NE, ND, OH, SD, WI)

61 South (AL, AR, DE, DC, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX, VA, WV)

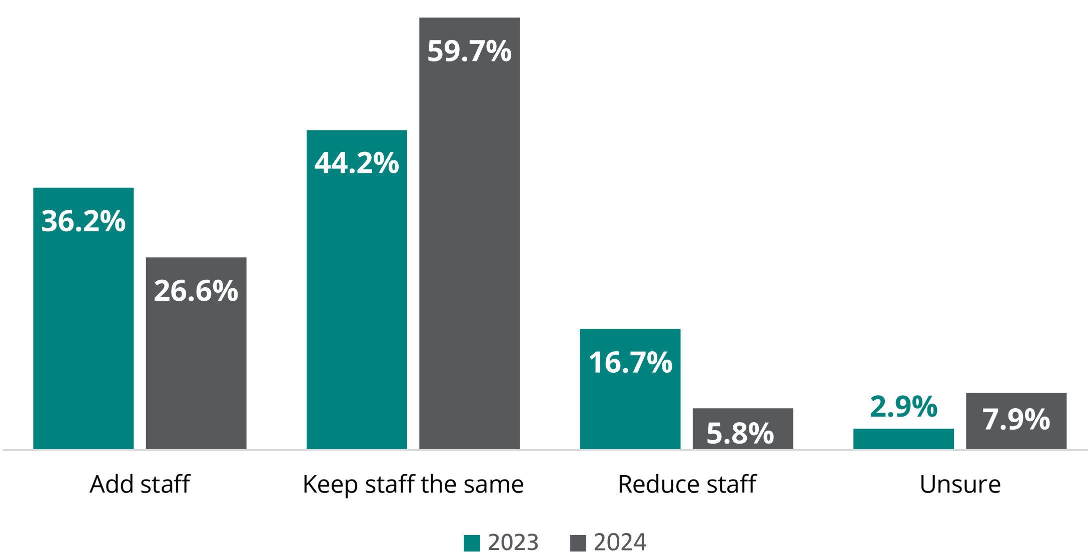
45 West (AK, AZ, CA, CO, HI, ID, MT, NV, NM, OR, UT, WA, WY)

17 Canada (AB, BC, MB, NB, NL, NS, NT, NU, ON PE, QC, SK, YT)

Revenue and Payroll	
2022 Revenue or most recent fiscal year revenue	[illegible]
Overall cost of payroll for 2022 or most recently completed fiscal year	[illegible]
Revenue per FTE	[illegible]
Payroll per FTE	[illegible]
Revenue per Production Area (sq ft)	[illegible]
Payroll per Production Area (sq ft)	[illegible]
Revenue per Field Production Area (acres)	[illegible]
Payroll per Field Production Area (acres)	[illegible]
Revenue per Retail Area (sq ft)	[illegible]
Payroll per Retail Area (sq ft)	[illegible]

**Revenue and payroll are presented as averages*

Staff Changes During 2023 and Anticipated Changes for 2024

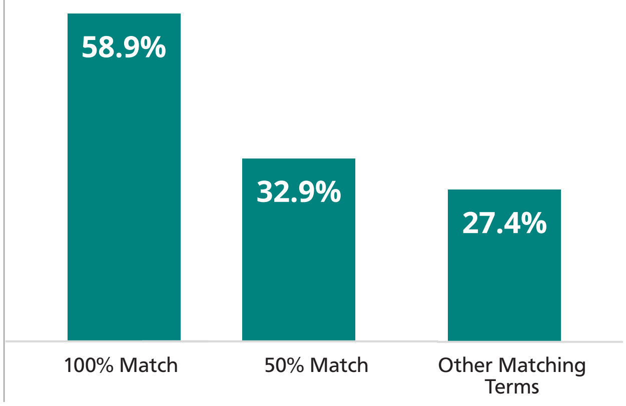


Benefits Currently Offered to Employees

Benefit	Full-Time	Part-Time	Seasonal
Health/Medical insurance	[illegible]	[illegible]	[illegible]
Dental Insurance	[illegible]	[illegible]	[illegible]
Life Insurance	[illegible]	[illegible]	[illegible]
Sick Leave	[illegible]	[illegible]	[illegible]
Disability Insurance	[illegible]	[illegible]	[illegible]
401(k)	[illegible]	[illegible]	[illegible]
Pension	[illegible]	[illegible]	[illegible]
Annual Bonus	[illegible]	[illegible]	[illegible]
Paid Vacation	[illegible]	[illegible]	[illegible]
Paid Holidays	[illegible]	[illegible]	[illegible]
Employee Discount	[illegible]	[illegible]	[illegible]
Other	12.7%	9.2%	4.0%

If a 401(k) is Offered, Contributions Matched?

401(k) Matching Terms



Some companies reported additional matching terms beyond the 100% or 50% match

COMPANY'S BUSINESS SEGMENT					
	All	Greenhouse Grower	Nursery Grower	Retail Garden Center	Other
COMPANY DEMOGRAPHICS					
(N)	239	124	89	73	59
Type of ownership					
(N)	239	124	89	73	59
Public	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Private - Outside Management	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Private - Family	81.2%	88.7%	82.0%	86.3%	62.7%
Municipality or University	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Companies Business Segment					
Greenhouse Grower	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nursery Grower	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Retail Garden Center	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Size of production area (in square feet)					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Median	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Average	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Size of Field Production area (in acres)					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Median	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Average	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Customers Sold to					
Independent Garden Centers (IGCs)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Big Box Stores	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Supermarkets/Smaller Hardware Stores	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Florists	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Landscapers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Wholesalers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Direct to Consumers (including online & catalog sales)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fundraisers		[illegible]	[illegible]	[illegible]	[illegible]
Brokers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Do not sell to customers (e.g. Municipality/University/Research)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

COMPANY'S BUSINESS SEGMENT

	All	Greenhouse Grower	Nursery Grower	Retail Garden Center	Other
Size of retail area (in square feet)					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Median	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Average	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Number of retail locations					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Median	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Average	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Landscape division					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Yes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
STAFFING & BENEFITS					
Individuals employed during peak season (Full-time and part-time)					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Median	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Average	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Number of Full-time equivalent employees (FTEs) during peak season					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Median	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Average	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Production Area per FTE	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Field Production Area per FTE	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Use either H-2A or H-2B program to fill some of workforce					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Yes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
If yes, number of workers that are part of H-2A or H-2B					
(N)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Median	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Average	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

HEAD GROWER

FULL-TIME

		BASE PAY (SALARY)				BASE PAY (HOURLY RATE)			
	Organizations	Average	Median	25th Percentile	75th Percentile	Average	Median	25th Percentile	75th Percentile
All Firms	41	$81,583	$74,249	$63,000	$98,966	$39.22	$35.70	$30.29	$47.58
Type of Ownership									
Public	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Private - Outside Management	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Private - Family Management	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Municipality or University	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Primary Business Segment									
Greenhouse Grower	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nursery Grower	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Retail Garden Center	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pay Type									
Salary	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Hourly	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Annual Net Sales Volume									
Less than $1 Million	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$1 to $4.99 Million	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$5 to $14.99 Million	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$15 Million or More	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Number of FTEs									
Less than 20	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
20-49	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
50-99	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
100-199	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
200 or More	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Region (Primary/HQ Location)									
Northeast	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Midwest	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
South	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
West	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Canada	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Size of Production Area (sq ft)									
Less than 100,000	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
100,000-499,999	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
500,000 or More	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Size of Field Production Area (acres)									
Less than 10	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
10-99	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
100-499	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
500 or More	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Size of Retail Area (sq ft)									
Less than 20,000	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
20,000-999,999	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
100,000 or More	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]