

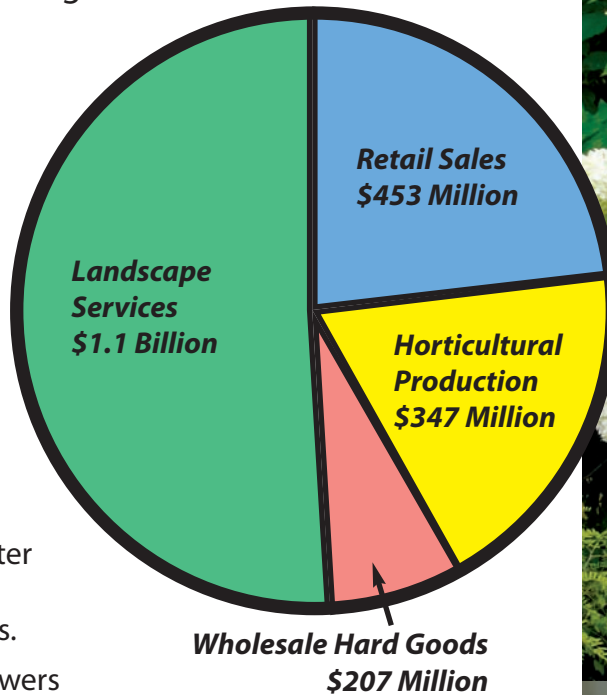


Minnesota's \$2.1 Billion Nursery and Landscape Industry

Creating & Caring for the Outdoor Living Environment

Minnesota's family-owned nursery and landscape businesses play a critical role in the protection and enhancement of your outdoor living environment.

- Trees provide shade and water transpiration that can lower local temperatures — sometimes by many degrees in a vegetated area. The shading effect of trees translates to energy savings and reduced regional pollution.
- Trees, urban forests, rain gardens, and lake shore vegetation help restore some of the natural balance in city watersheds by buffering stormwater runoff, absorbing pollutants, and recharging groundwater reservoirs.
- Urban green spaces, parks and flowers are critical to birds, bees and butterflies.
- Plants are efficient air pollution removers and noise pollution filters.
- Updated hardscape technologies provide for stormwater runoff control through permeable interlocking pavement systems.
- Improved landscape irrigation systems and practices can dramatically lower water use while keeping plants healthy, lowering the urban heat island effect.



Annual Gross Volume of Sales
\$2,114,304,000

Total Annual Payroll
\$697,940,000

Total Number of Employees

Full-Time	10,000
Part-Time	1,700
Seasonal	16,500

Annual Capital Expenditures
Nursery / Greenhouse /
Garden Center

\$39.3 million

Landscape services
\$36.5 million

Figures listed are annual gross volume of sales.

Source: Minnesota Nursery and Landscape Industry Economic Impact Study Conducted by St. Cloud State University Department of Economics

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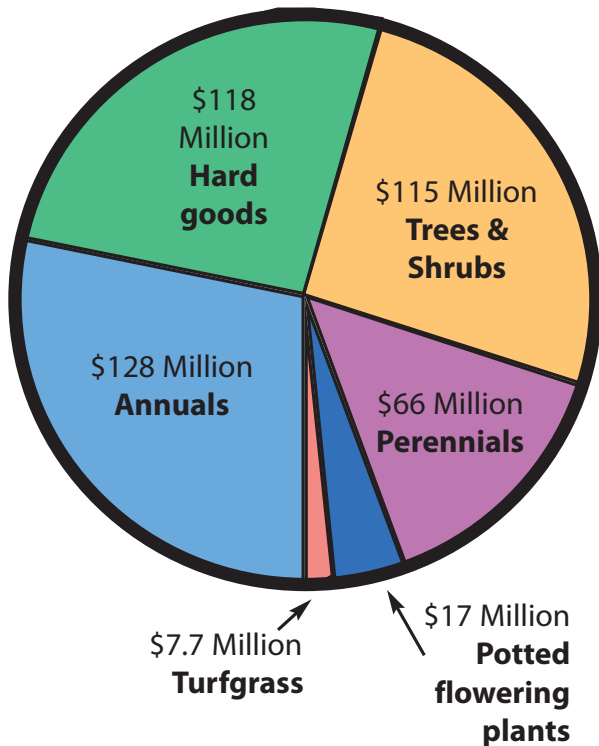
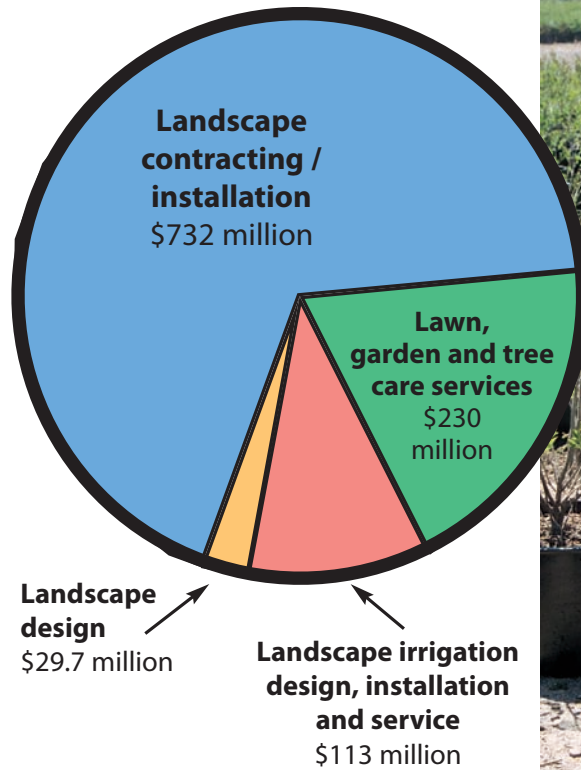


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LANDSCAPE SERVICES \$1.1 BILLION

Recent years have seen an explosion in the number of property owners hiring companies to design, install and maintain landscape features. The traditional horticultural practice of selling a plant and letting the consumer care for it has been augmented by several specialized fields of professional services for the outdoor living environment.



WHOLESALE HARD GOODS \$207 MILLION

Includes fertilizers and other chemicals, tools, mulch, outdoor statuary, retaining wall and walkway materials, landscape lighting, and ponds.

RETAIL SALES \$453 MILLION

Retail nursery and landscape sales come in many forms: the seasonal roadside market selling a few annuals; specialized tree or flower growers; hardscape supply centers selling landscape rock and retaining wall materials; and the full service garden center selling a complete line of plants and landscape materials.



Source: Minnesota Nursery and Landscape Industry Economic Impact Study
Conducted by St. Cloud State University
Department of Economics
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AGRICULTURAL PRODUCTION \$347 MILLION

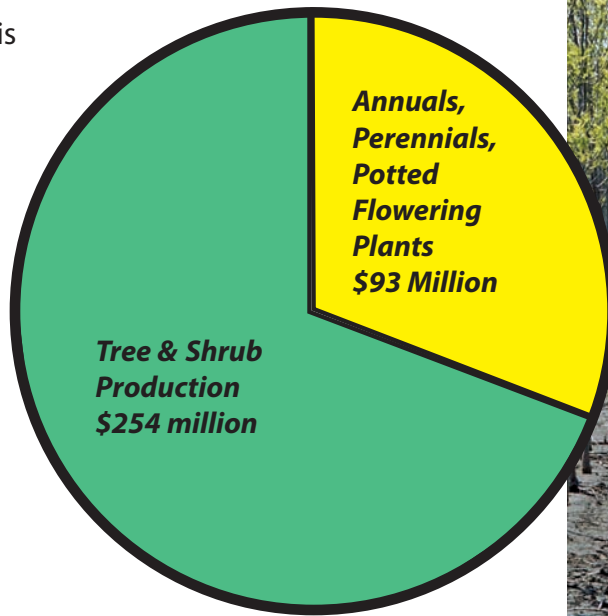
Nationally, horticultural production is one of the largest segments of agriculture. The growing of trees, shrubs, perennials, annuals and potted flowering plants is recognized by the U.S. Department of Agriculture as specialty crop farming.

Minnesota tree and shrub production
\$254 million

Minnesota annual, perennial, groundcover, herb, and potted flowering plant production
\$93 million

Land in Minnesota used in the production of woody plants and field grown perennials
22,000 acres

Greenhouse space in Minnesota used in the production of annuals, perennials, and potted flowering plants
13 million square feet



Figures listed are annual gross volume of sales.

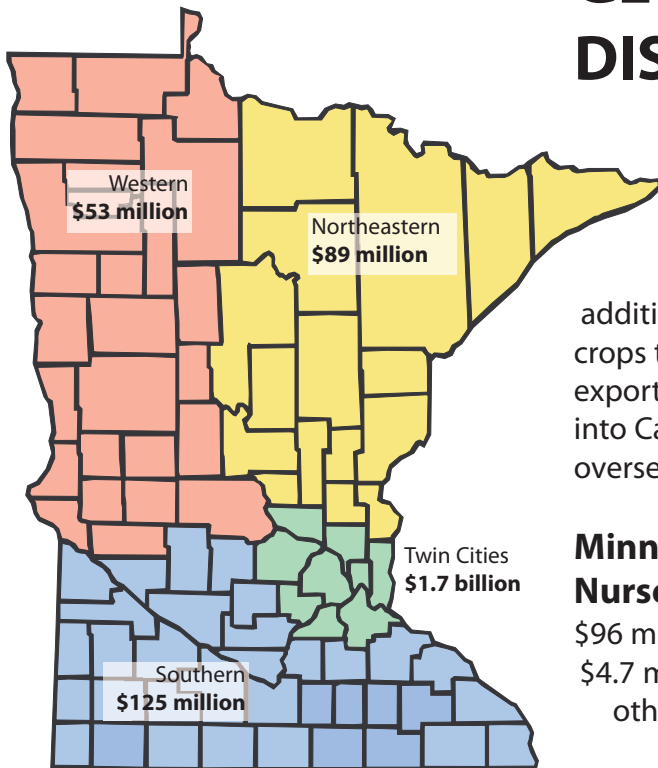
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GEOGRAPHIC DISTRIBUTION

The nursery and landscape industry reaches into every corner of Minnesota, as shown by the gross sales per region on the map. In addition, nursery and greenhouse crops that are grown in Minnesota are exported to nearly every state and into Canada, as well as to countries overseas.

Minnesota's Nursery & Landscape Exports
 \$96 million to other states
 \$4.7 million to Canada and other countries



"The Minnesota Nursery & Landscape Industry Economic Impact Study – Benchmarking the Industry's Value and Growth Potential" was a joint effort of the cooperators listed at right. The project was spearheaded by the Minnesota Nursery & Landscape Association (MNLA) on behalf of the industry's 3,000 companies. Major funding was provided by AURI. The survey tool was compiled by MNLA in cooperation with Dr. Leonard Perry at the University of Vermont, the Horticultural Research Institute, the University of Minnesota Department of Horticulture and others. Industry companies were surveyed in the winter of 2001-2002. Data compilation and analysis was performed by researchers at the St. Cloud State University Department of Economics under the direction of Dr. Nathan Hampton.



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Agricultural Utilization
 Research Institute

