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Commercial Horticulture: Principal Marketing Channels used by Ornamental and Floriculture Crop Producers in Florida.

Florida has a thriving horticulture industry, no doubt! Not only is it important in supplying the local needs of horticulture products, but the market reaches out to all regions of the United States and international markets too. I will illustrate the wholesale movement of Florida's two leading horticulture products: (1) Nursery and (2) Cut Foliage and Flower products.

The total horticulture industry in Florida encompasses industries such as ornamental nurseries, greenhouse (i.e. foliage) and landscape industries, lawn and garden retailers, and associated machine and equipment industries to name just a few. These industries can be grouped into three major divisions which include: (1) Nursery Grower Sales, (2) Landscape Sales and (3) Garden Center Retail Sales. The total revenue of these three group sales is approximately \$15.2 billion dollars. In the United States, California ranks top with Florida as second place in terms of overall industry value.¹

With abundant inventory nursery products, Florida is a resource of these products not only to the state of Florida, but national and foreign markets as well.

¹ Hodges, A.W. PhD, Haydu, J.J. PhD. University of Florida/IFAS. FNGLA. The Nursery and Landscape Industry's Impact on Florida's Economy.

On a state level, for Florida's Nursery Grower industry, the industry includes sub-groups including: shrubs, tropical foliage, deciduous trees, turfgrass, liners, potted flower plants, palms, flower trees, cut foliage or flowers, ground covers, and other plants. The top five including: shrubs with receipts of \$578 million, tropical foliage with \$437 million, deciduous trees with \$389 million, turf grass with \$307 million, and liners with 297 million. (Chart 1)

With the nursery market (i.e. excluding the cut foliage and flower market), 32 percent of the total nursery sales are used by the local areas. The local area includes a 50 mile radius in which the horticulture product is grown. Twenty-six percent is used in Florida, outside the 50 mile radius of the local area. Florida's nursery products are used in four regions: southeast, northeast, midwest and western states of the United States. As illustrated, 14 percent of Florida's nursery products are used in the southeast United States, followed by the northeast United States with 12 percent, then the midwest United States with 8 percent, and western United States with 6 percent. In addition, 1 percent is exported to Canada and another 1 percent to other countries. (Chart 2)

Within the Nursery Growers group, the Cut Foliage and Flower market by itself claims 15 percent of the total foliage sales are used by the local area. The local area includes a 50 mile radius in which the foliage product is grown. Twelve percent is used in Florida, outside the 50 mile radius of the local area. Florida's horticulture products are used in four regions of the United States: southeast, northeast, midwest and western states of the United States. As illustrated, the southeast United States use 13 percent, followed by the northeast United States with 30 percent, then the midwest United States with 18 percent, and western United States with 9 percent. In addition, 4 percent is exported to Canada and another 1 percent to other countries. (Chart 3)

Through Florida's wholesale distribution of Nursery, Cut Foliage and Flower products, Florida along with other states and international markets will benefit from the effect of retail sales and result in a positive economic growth for the respected economies.

Chart 1. Florida's Nursery Industry Sales - \$ millions

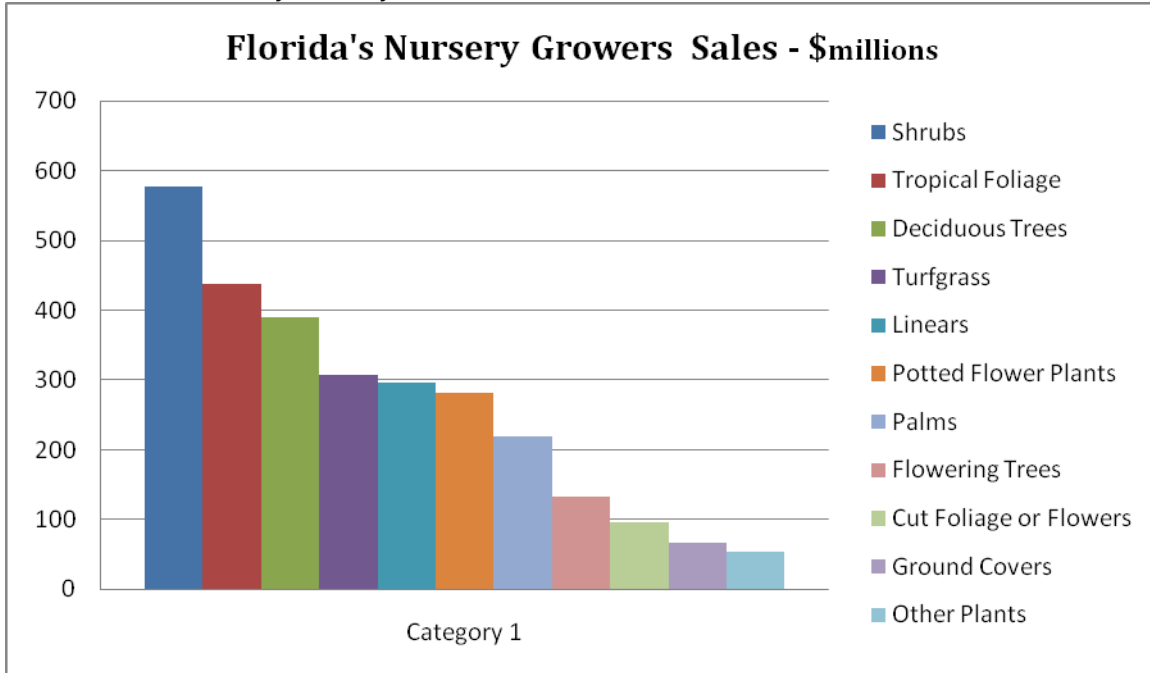


Chart 2. Nursery Grower Sales – by Market Area

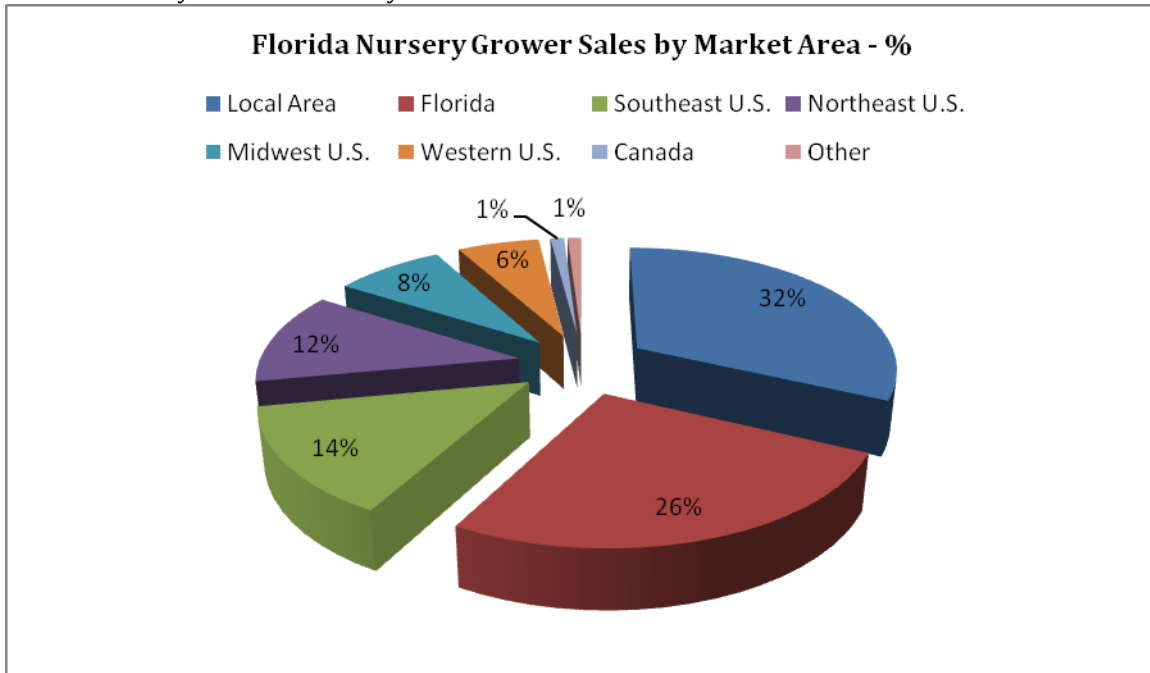
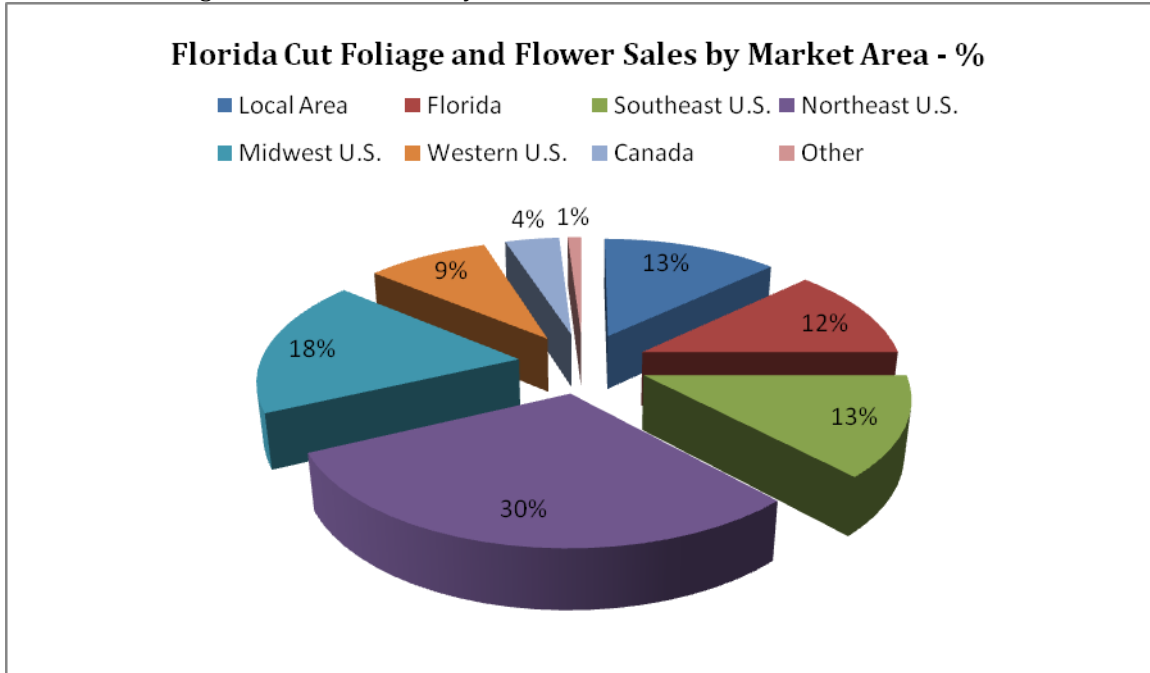


Chart 3. Cut Foliage and Flower Sales – by Market Area



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