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**ACIL ALLEN**

# Nursery Industry Statistics 2020-21 to 2024-25 (NY21000)

## 2024-25 Production Nursery Data Capture Report

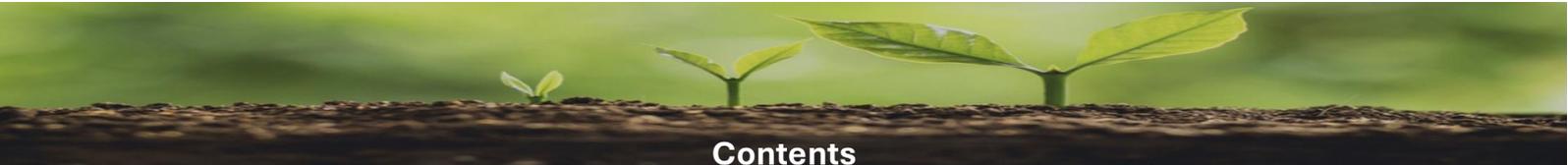
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Data and insights provided in this report are based on information provided by survey respondents and subsequent assumptions made. Readers should note there is a margin of error on all data provided and the report authors cannot guarantee the accuracy of information provided or assumptions made.

## Acknowledgements

GIA, DTER and ACIL Allen would like to thank all survey respondents for providing data and information for this study. We appreciate the time and effort taken to provide a considerable amount of data and information.

# Executive Summary

## Background

The 2024-25 nursery industry statistics report, conducted under Hort Innovation's NY21000 project, provides a comprehensive overview of production nursery performance across Australia.

The data provides insights to support timely industry decision making and strategic planning as well as the development of a business benchmarking tool distributed to survey participants and upon request to other levy payers.

## Methodology

To enable year on year comparison, the 2024-25 methodology remains consistent with prior survey waves, with minor alterations implemented to maximise survey participation and minimise potential biases.

Data for the report is based on 300 interviews with a random sample of production nurseries. The margin of error nationally where the total sample responds is  $\pm 5.1\%$ . Assumptions detailed fully in section 1 of this report were made to enable extrapolation of the data to represent the entire production nursery industry.

## Survey results

### Number and value of plants sold

Survey results suggest that production nursery sales increased by 3% year on year, reaching an estimated \$3.49 billion in 2024-25.

Excluding sales to other production businesses to avoid double counting plants sold, the industry contributed an estimated \$2.76 billion to the economy.

Victoria (34%), New South Wales (26%) and Queensland (24%) collectively accounted for 84% of total sales.

Retail nurseries remained the largest sales channel, with \$1.48 billion in sales, while sales to landscapers, developers and builders reached their highest recorded amount.

Perennials, trees and shrubs continued to be the dominant plant category sold, representing 47% of total sales value. Herbs and vegetables led in unit volume, exceeding one billion plants sold. Other categories, indoor plants, propagation, bedding and potted colour, fruit, nuts and vines each contributed approximately 10% of total value with only minor year on year changes.

### Sales to 'big box' retailers

In 2024-25, 31% of all businesses nationally sold plants to 'big box' retailers. This is equivalent to approximately half (46%) of those selling to the retail sector (either 'big box' or independent retailers).

The total value of sales to 'big box' outlets rose to \$875 million, driven primarily by large businesses. Nationally, these sales accounted for 59% of retail sector sales, with Bunnings representing the vast majority of this channel.

## Current industry sentiment and future operating plans

Over the past 12 months, increases are evident in both industry confidence (78%, up from 72%) and the proportion of respondents planning to grow their business over the next five years (45%, up from 41%). This sentiment continues to be more common among larger and more profitable enterprises.

However, constraints such as input costs, labour shortages, and biosecurity risks remain common barriers to these enterprises achieving their planned expansion.

## Business investment and technology adoption

Approximately half (52%) of businesses invested in infrastructure or new technology in 2024-25, a slight increase from the prior financial year (48%).

Investment levels were highest among large operators, however, the proportion of large businesses investing in infrastructure or new technology continues to trend downward.

Adoption of basic automation, such as irrigation control is widespread and while use of advanced technologies is significantly more common among larger businesses, it remains limited nationally.

## Workforce and Productivity

Production nurseries employed an estimated 22,100 people, with approximately 19,000 Full Time Equivalents (FTEs). Large businesses accounted for 65% of employment and achieved a higher turnover per FTE (\$204,000) compared to smaller operators.

## Conclusions and recommendations:



Production nurseries continue to contribute substantial economic value - 3.49 billion in 2024-25 or \$2.76 billion excluding double counting of plants sold.



Year on year sales increased approximately 3% in 2024-25 resulting in significantly more widespread industry profitability and confidence than 12 months ago.



There is an opportunity to support more businesses to adopt new technologies which may improve productivity and potentially mitigate some constraints to expansion due to labour shortages and rising production costs.



The number of industry businesses continues to slowly contract and while it is most prevalent among small operators limiting the impact on overall production value, the number of large businesses contracting this year should be monitored in future.

## Background

The 2024-25 Production Nursery Data Capture Report is the fifth annual survey under the NY21000 Project umbrella and ninth nursery statistics survey funded by Hort Innovation.

The survey gathers timely point-in-time and tracking metrics to support industry decision-making, advocacy, resource prioritisation, investment evaluation, and strategic planning.

Additionally, survey results feed into an interactive benchmarking tool, enabling participants and Hort Innovation levy payers to assess their business performance against aggregated survey data

The 2025 survey largely collects 2024-25 financial year data, including the following metrics:

- the value of production nursery sales by state, supply chain and plant category
- the value of sales to 'big box' retailers and Bunnings stores specifically
- perceived constraints to production nursery business growth
- adoption of new technologies
- operational and input costs
- current future industry sentiment and operational phase
- employment numbers and wage expenditures
- profitability and investment figures
- indoor and outdoor production area
- use of the benchmarking data tool and impact on business decisions

## Data collection methodology

To maximise participation rates and ensure data can be reliably compared to past years, the 2024-25 data collection followed a methodology similar to past Hort Innovation funded nursery statistics surveys:

### Stage 1:

- A random sample of greenlife producers was contacted via phone by experienced members interviews.
- The appropriate respondent to complete the survey was identified in each business, their contact details collected and a follow-up appointment scheduled to complete the survey.

### Stage 2:

- Interested respondents received a confidentiality statement (Appendix 1), a one page snapshot of the industry produced by GIA (2023-24 financial year) and full survey questionnaire (appendix 2) to clarify data requirements and DTER's data and confidentiality practices.

### Stage 3:

- Interviews were completed via Computer Assisted Telephone Interviews (CATI) or if preferred, submitted via email, post or completed online.

The contact database developed in NY16004 and updated by GIA and DTER throughout the NY21000 Project was fed into the CATI program set up by Market Metrics Data Collection (accredited market research call centre used for the project based in Victoria). The contact list contained both members of GIA and non-members.

All interviewers used for the project have considerable experience working on DTER's projects in the agriculture sector and all worked on the previous survey. Prior to commencement, interviewers were thoroughly briefed on all aspects of the project by Daniel Watson, a senior consultant at DTER.

Survey fieldwork was conducted from October to December 2025. In total, 300 interviews were completed, 174 interviews via telephone, 59 received via email and 67 entered via the online platform.

The sampling margin for error (at the 95% confidence level), where 50% of respondents concur) is  $\pm 5.1\%$  on national results

### Data weighting and number of greenlife businesses

Due to the comprehensive number of calls made for the project, it is possible to make assumptions on the number of businesses in each state and subsequently determine weighting figures that could be applied to the interviews achieved so statistics represent the entire greenlife production industry, not only the sub-set of organisations participating in the study.

It is important to note:

- the survey sample and contact database includes both 'engaged' businesses (such as members of GIA) as well as non GIA members to ensure a representative sample, but also assist in defining the industry.
- The extrapolation of data makes the assumption that the sample of greenlife businesses participating in the data collection survey represents 'the universe' of greenlife production organisations.

	national	nsw/act	vic	qld	sa	wa	tas	nt
<b>Number of greenlife production businesses <i>estimated</i></b>	1557	471	416	398	92	122	48	10
Number of interviews conducted	300	90	98	57	18	27	8	2

### Confidence limits

sample base	margin of error (where 50% of respondents concur)
300	±5.1%
200	±6.5%
100	±9.5%
50	±13.6%
30	±17.7%

### Handling of 'empty cells'/missing data

The data set includes a number of 'empty cells' or missing data points, often due to respondents being unaware of the number of plants sold or unable to extract data according to requested categories and supply chain options. In such cases, respondents typically provide a total value and/or number of plants sold.

To reliably weight and extrapolate data to represent the entire industry means these 'empty cells' must be addressed. The technique (detailed below) previously utilised in Hort Innovation Projects NY16004 and NY17008 and prior waves of NY21000 was used again this year, supported through DTER's comprehensive database of de-identified past survey data.

NY16004 identified a significant variation in business sizes and data (e.g. selling plants priced from less than \$1 to greater than \$1,500), making it inappropriate to apply a single to each empty cell.

Consequently, where respondents were able to provide the number of plants sold or the value of plants sold, but lacked

details in one category, missing data was inferred using available information (e.g. plant sales value, employee numbers, FTE, total turnover).

For instance, if a business with 20 employees reported the total value of 'perennials, trees & shrubs' and 'bedding and potted colour' sold to retailers and landscapers but lacked plant count data, averages from similar organizations (based on sales value, size, client base, and product type) were used to fill the gaps.

While it is acknowledged that a margin for error exists in the data provided in this report due to sampling, assumptions made and data provided by respondents, the report authors are reasonably confident it provides useful insights into the size of the greenlife production industry as well as attitudinal data. DTER acknowledges this method may be a contributing factor in discrepancies between data collected for this project and historical data collection efforts.

## 2. Definitions and report notes

While past Australian Bureau of Statistics (ABS) data split greenlife production businesses into 3 classes (\$200,000 turnover or less; \$200,001 to \$2 million and more than \$2 million), DTER believes a ‘micro’ business is more appropriately defined as having turnover of \$500,000 or less. Consequently, business sizes included in this report vary from those presented by ABS in the past.

The majority of data collected for the project is based on the 2024-25 financial year, comparisons made to 2024 data, will be based on the 2023-24 financial year for most variables.

Throughout this report, reference is made to various segments, defined in the table below:

<b>Enterprise phase</b>	Steady, happy	Those whose business is in status due to being at an acceptable stage
	Steady, unable	Those whose business is in status due to being unable to expand
	Expansion	Those whose business is in an expansion phase
	Winding down	Those contracting size of enterprise
<b>Business size (turnover)</b>	Small	Turnover less than \$500,000
	Medium	Turnover between \$500,000 and \$2,000,000
	Large	Turnover greater than \$2,000,000
	Don't know (don't know t/o)	Unable to provide turnover value
<b>Perception of industry</b>	Positive	Those feeling very or fairly positive about the future of the nursery industry
	Negative	Those feeling very or fairly negative about the future of the nursery industry
	Neutral	Those feeling neutral or unsure about the future of the nursery industry
*	Small sample size	Sample less than n=30, caution required interpreting data

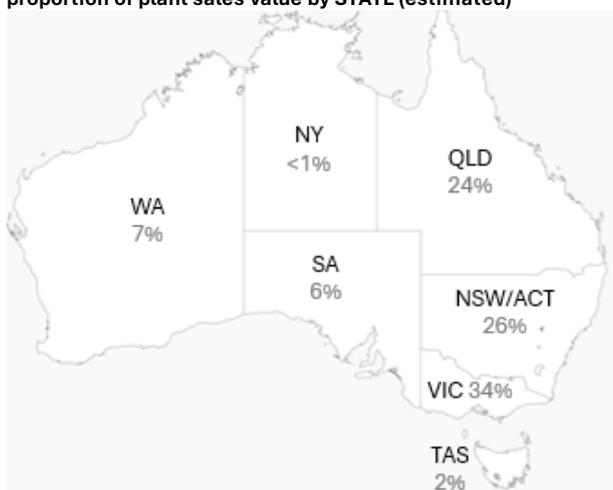
### 3. Number and value of plants sold

#### 3.1 National and state production value

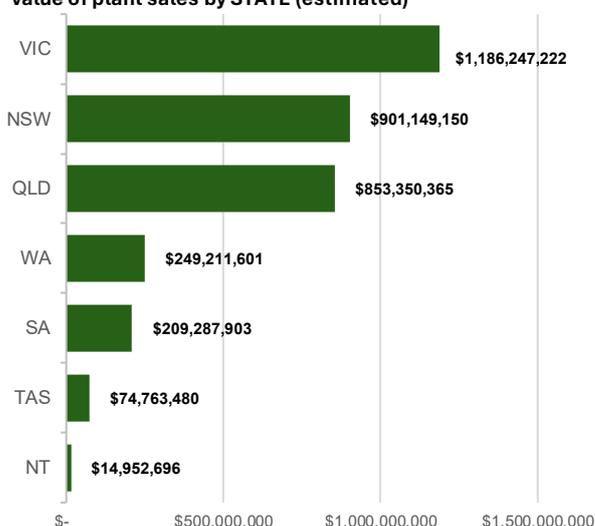
total greenlife sales (\$'000,000) (base: able to answer)



proportion of plant sales value by STATE (estimated)



value of plant sales by STATE (estimated)



#### Key findings

- Survey results suggest that in 2024-25 production nursery sales increased 3% year on year to approximately \$3.5 billion (up from \$3.4 billion in 2023-24).
- Excluding sales to other wholesale nurseries to prevent the 'double counting' of plants sold, the total value of production in 2024-25 is estimated at \$2.76 billion, up from \$2.65 billion in 2023-24.
- Using data based on the average across the past 3 data collections, it is estimated that Victorian production businesses represent 34% of total industry sales, New South Wales 26%, Queensland 24%, with the other states and territories making up the remaining 16%.
- It is important to note that the extrapolation of data makes the assumption that the sample of greenlife businesses participating in the survey represents the entire population of greenlife production organisations.

#### Implications

Survey results suggest that production nursery sales in 2024-25 reversed the downward trend evident since the Covid-19 related highs and increased approximately 3% on the prior financial year. If businesses can successfully implement their planned growth, sales may increase again in 2025-26.

**total national production nursery sales in 2024-25 (estimated)**

Total value of plants sold (including those sold to wholesalers):	\$3,488,962,418
Total value of plants sold (excluding double counting):	\$2,756,512,998
Total estimated number of plants sold	2,133,494,985

**total sales production nursery sales in 2024-25 by State (estimated)  
Including value of plants sold to wholesalers**

Victoria	\$1,186,247,222
New South Wales/ACT	\$901,149,150
Queensland	\$853,350,365
Western Australia*	\$249,211,601
South Australia*	\$209,287,903
Tasmania*	\$74,763,480
Northern Territory*	\$14,952,697

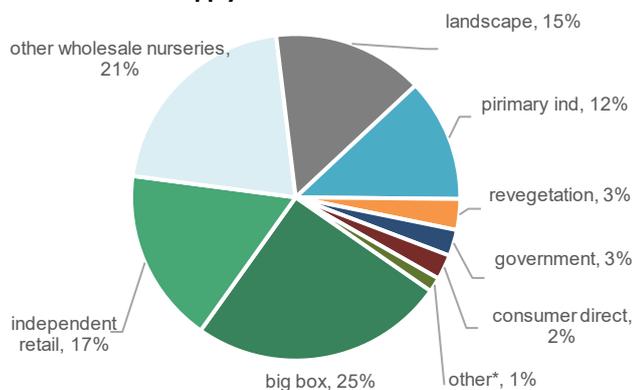
\*Caution, sub sample smaller than n=30, data is indicative only

## 3.2 Value of plants sold by supply chain

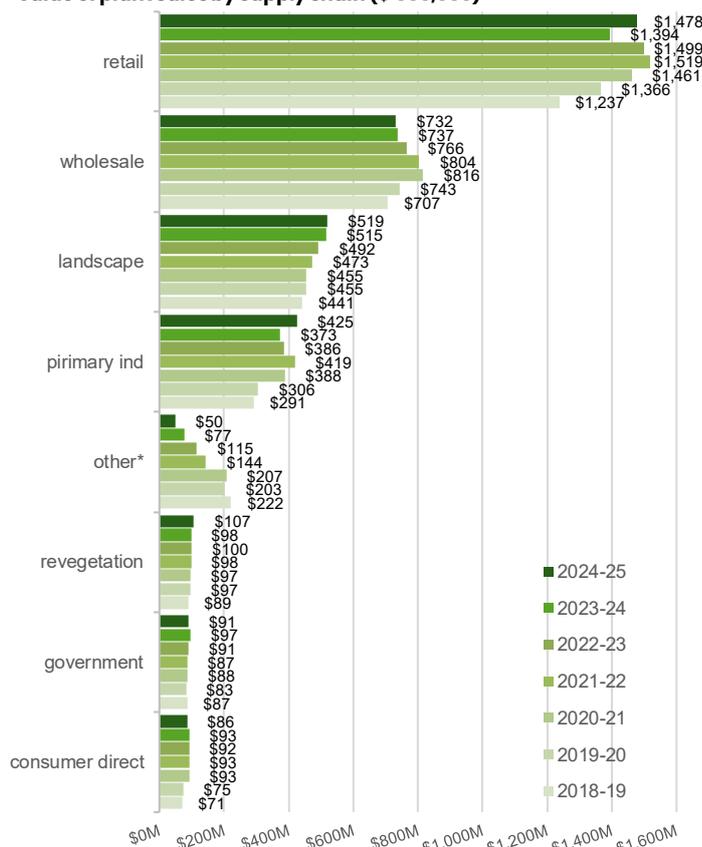
Questions asked: Q7.

In the 2024-25 financial year what was the total value (including resale) excluding GST of plants sold to ...

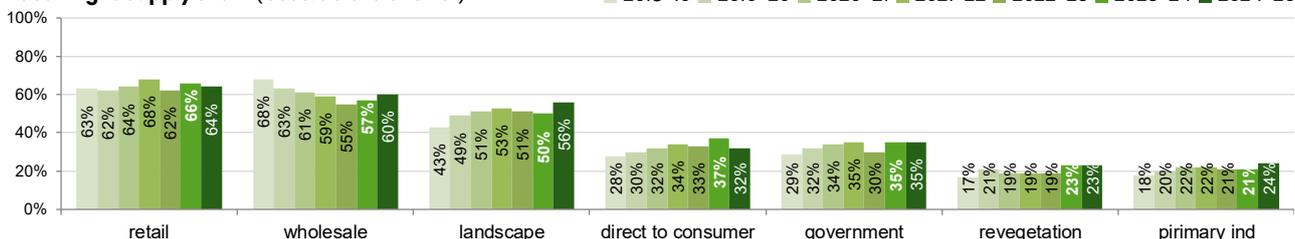
% market share x supply chain



value of plant sales by supply chain (\$'000,000)



% selling to supply chain (base: able to answer)



### Key findings

- Retail nurseries remain the largest sales channel with 64% of all respondent businesses selling to the sector. Sales in 2024-25 were estimated to be \$1.48 billion in value or 42% of all sales.
- Sales to 'big box' retailers represent one quarter of the value of all production nursery sales and independent equivalents 17%.
- Six in 10 production nurseries sell to other wholesale nurseries, and a similar proportion (56%) now sell to landscapers, developers and builders. Notably the later result is the highest since the survey's inception.
- Consistent with the prior survey wave, sales to revegetation and forestry were captured as separate categories. Twenty two percent (22%, was 21%) of respondents sell to revegetation and 13% (was 10%) to forestry.
- Due to small samples sizes and difficulty distinguishing sales between these categories, a combined revegetation/forestry estimate is retained, rather than attributing values to each.
- Direct to consumer sales declined slightly, both in the proportion of businesses selling to the chain and value (\$86 million).
- On par with 12 months ago, 35% of businesses sold to Government, but the value sold decreased (\$91 million).
- Readers should note 'other' mentions include totals for those people unable to provide breakdowns by category.

### Implications

Sales to retail nurseries continue to represent a large and growing proportion of production sales, particularly to 'big box' retailers, however, there is also continued sales growth to the landscape and builder category. Continuing to pursue growth in government, environmental and primary industry sectors is likely to benefit the industry.

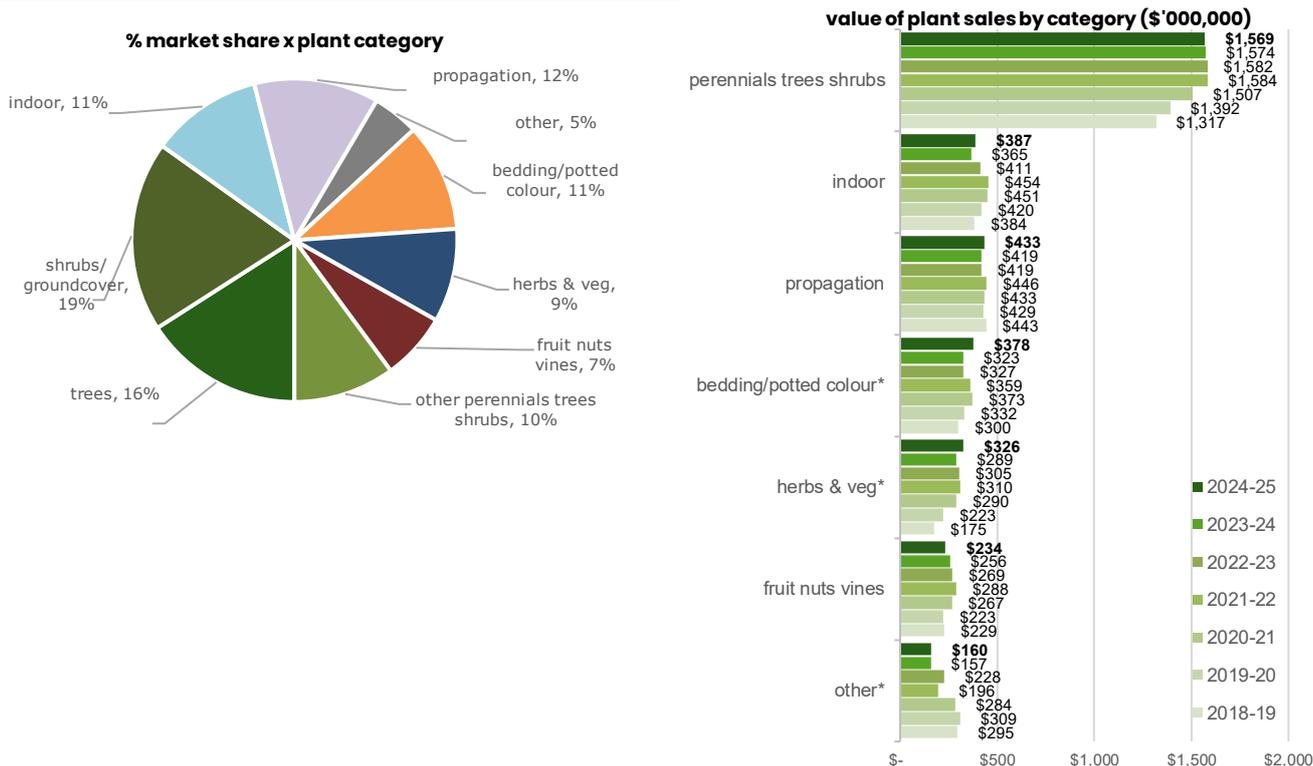
supply chain category for plants sold (estimated)	2023-2024 year (2024 survey)	2024-2025 year (2026 survey)
<b>Other wholesale/production nurseries:</b>		
% selling to sector	57%	60%
Total value of plants	\$736,478,789	\$732,449,420
<b>Retail nurseries:</b>		
% selling to sector	66%	64%
Total value of plants	\$1,393,570,447	\$1,478,353,124
<b>Total: Revegetation, including forestry:</b>		
% selling to sector	23%	23%
Total value of plants	\$97,920,507	\$106,674,667
<b>Revegetation:</b>		
% selling to sector	21%	22%
<b>Forestry:</b>		
% selling to sector	10%	13%
<b>Local, State and Federal Government Departments:</b>		
% selling to sector	35%	35%
Total value of plants	\$97,284,717	\$90,696,797
<b>Landscapers, developers and builders:</b>		
% selling to sector	50%	56%
Total value of plants	\$515,412,362	\$519,308,256
<b>Primary industry:</b>		
% selling to sector	21%	24%
Total value of plants	\$372,967,504	425,219,587
<b>Direct to consumer:</b>		
% selling to sector	37%	32%
Total value of plants	\$93,199,014	\$86,336,707
<b>Other (includes those unable to breakdown by category) :<sup>†</sup></b>		
% selling to sector	5%	9%
Total value of plants	\$77,244,649	\$49,923,861
<b>Total value of plants sold (including those sold to wholesalers):</b>	<b>\$3,384,077,989</b>	<b>\$3,488,962,418</b>
<b>Total value of plants sold (excluding double counting):</b>	<b>\$2,647,599,200</b>	<b>\$2,756,512,998</b>

Due to small sample sizes by category, only national data is provided  
NOTE: Data is for the 2024-25 year and not necessarily representative of sales in every year.

<sup>†</sup>Significance testing not conducted, small sample size

### 3.3 Value of plants sold by plant category

Questions asked: Q8. During the 2024-25 financial year, how many plants did you sell in the following categories?  
 Q9. And what was the total value of (from Q8) plants sold?



% selling plant category (base: able to answer)



#### Key findings

- Perennials, trees and shrubs remain the dominant plant category sold. 61% of businesses sell this plant category, with sales estimated to be \$1.57 billion in 2024-25, equivalent to 45% of the total value sold by industry.
- Within the category, the proportion of businesses selling each of trees and shrubs/groundcovers remains evenly split.
- Overall, sales of trees represented 16% of all production nursery sales, shrubs/groundcovers 19% and difficulty splitting sales of perennials, trees and shrubs into more granular categories accounted for an additional 10%.
- Propagation plants, herbs and vegetables, bedding and potted colour, fruit, nut and vines and indoor plants each contribute approximately 10% of total sales value.
- The total number of plants sold reached 2.13 billion units in 2024-25. Herbs and vegetables lead sales volume (over 1 billion units). However, the data also highlights ongoing challenges in categorising plant units, especially for products sold in bulk formats, suggesting that unit counts are indicative and should be interpreted with caution.
- As per section 3.1, 'other' mentions in this section include totals from respondents unable to provide breakdowns by category.

#### Implications

The nursery industry is maintaining a broad product portfolio of plants grown to meet market demands. The sustained dominance of perennials, trees and shrubs, alongside the rising share of indoor and herbs and vegetables may suggest opportunities for growth.

client category for plants sold (estimated)**	2023-2024 year (2024 survey)	2024-2025 year (2025 survey)
<b>Propagation plants:</b>		
% selling propagation plants	31%	32%
Total number of plants	498,292,069	453,477,443
Total value of plants	\$419,116,407	\$432,543,857
<b>Herbs and vegetables:<sup>+</sup></b>		
% selling herbs and vegetables	7%	9%
Total number of plants	976,470,659	1,074,321,305
Total value of plants	\$289,996,349	\$326,469,748
<b>Fruit trees, nut trees, vines:</b>		
% selling fruit trees, nut trees, vines	22%	20%
Total number of plants	25,987,180	26,394,416
Total value of plants	\$256,551,091	\$234,052,259
<b>Bedding and potted colour:<sup>+</sup></b>		
% selling bedding, potted colour	11%	18%
Total number of plants	160,353,275	181,958,168
Total value of plants	323,047,515	\$377,954,844
<b>Indoor plants:</b>		
% selling indoor plants	18%	25%
Total number of plants	70,512,215	76,553,137
Total value of plants	\$365,019,633	\$387,249,051
<b>Total: Perennials, trees and shrubs:</b>		
% selling perennials, trees, shrubs	66%	61%
Total number of plants	309,106,670	317,261,628
Total value of plants	\$1,574,394,160	\$1,569,400,713
<b>Trees:</b>		
% selling trees	50%	50%
Total number of plants	99,975,596	90,312,247
Total value of plants	\$613,868,767	\$554,055,646.37
<b>Shrubs and groundcovers:</b>		
% selling shrubs and groundcovers	50%	49%
Total number of plants	151,212,746	159,693,857
Total value of plants	\$640,752,411	\$664,341,511
<b>Other perennials, trees and shrubs (those unable to split trees and groundcovers/shrubs):</b>		
Total number of plants	57,918,328	67,255,524
Total value of plants	319,772,981	\$351,003,556
<b>Other (includes those unable to breakdown by category):<sup>+</sup></b>		
% selling other	11%	3%
Total number of plants	23,362,426	854,601.56
Total value of plants	\$156,720,804	\$161,291,946
<b>Total plants sold (including those sold to wholesalers):</b>		
<b>Total number of plants</b>	2,064,084,494	2,133,494,985
<b>Total value of plants</b>	\$3,384,845,960	\$3,488,443,914

Due to small sample sizes by category, only national data is provided \*Significance testing not conducted, small sample size

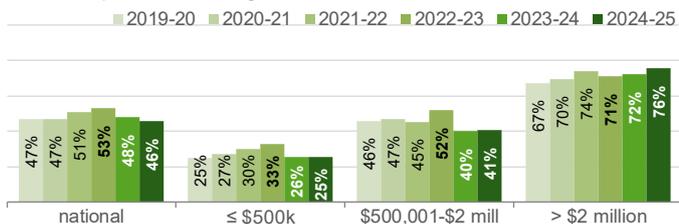
NOTE: Data is for the 2024-25 year and not necessarily representative of sales in every year;

\*\*significance testing not conducted on the number of plants sold due estimated figures provided by some respondents

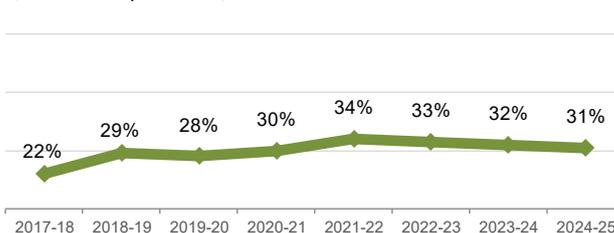
### 3.4 Sales to 'big box' retailers

Questions asked: Q10. In 2024-25, did you sell plants to 'big box' retailers such as Bunnings, Mitre 10, Coles, Aldi, Woolworths or other large retailers? Q11. What percentage of your sales to retail nurseries went to these 'big box' retailers Q12. And what percentage by value of your sales to retail nurseries are to Bunnings?

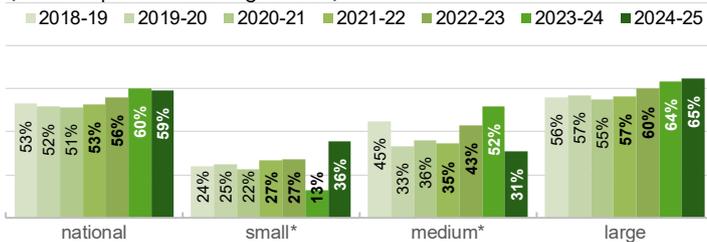
**% of businesses selling to 'big box' retailers**  
(base: respondents selling to retail)



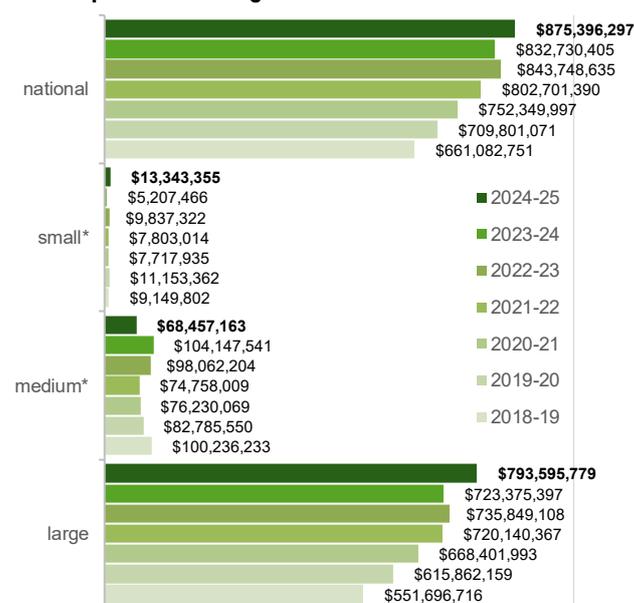
**% of all businesses selling to 'big box' retailers**  
(base: all respondents)



**% of all retail sales to 'big box' retailers**  
(base: respondents selling to retail)



**value of plants sold to 'big box' x business size**



#### Key findings

- In 2024-25, 46% of production nurseries selling to the retail chain reported sales to 'big box' retailers (e.g. Bunnings, Mitre 10, Coles, Aldi, Woolworths). Consistent with past results, this varies from 76% of large businesses to 25% of small counterparts.
- Similar to the prior financial year, sales to 'big box' retailers represented an estimated 59% of sales to the retail sector, with this proportion rising to 65% among large businesses.
- The total value of plants sold to 'big box' retailers increased slightly, estimated at \$875 million, up from \$833 million in 2023-24, with large businesses accounting for \$794 million of this figure.
- Among those selling to 'big box' retailers, 69% sell to Bunnings, with an estimated 92% of 'big box' sales going to Bunnings specifically in 2024-25.

#### Implications

Production nursery plant sales to 'big box' retailers continue to increase and now represent one quarter of the value of the industry's total sales. Results suggest that sales to Bunnings' are the primary outlet for 'big box' sales and highlights its pivotal role in shaping the distribution landscape for production nurseries.

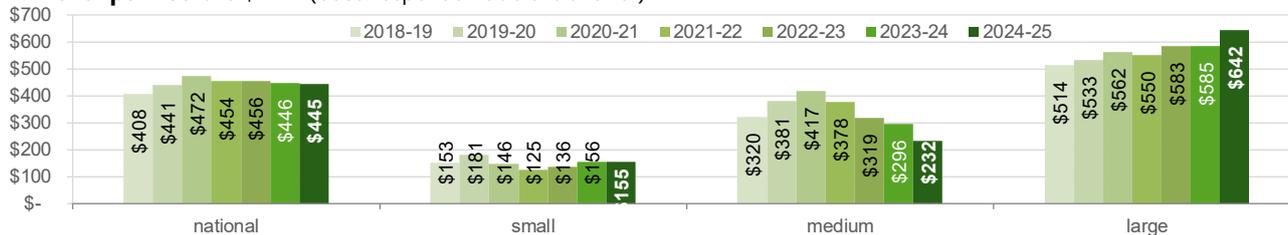
plants sold to 'big box' retailers 2024-25 (estimated)	% mentioning (base: all respondents selling to retail/able to answer) turnover				
	national	≤ \$500k*	\$500k to \$2 mil*	> \$2 million	don't know t/o*
% selling to 'big box' retailers (base: respondents selling to retail chain n= 201)	46%	25%	41%	76%	23%
% of retail sales to 'big box' retailers (base: n=90)	59%	36%	31%	65%	NA
Total value of plants sold (base: n=90)	\$875,396,297	\$13,343,355	\$68,457,163	\$793,595,779	NA
% selling to Bunnings <b>(base: those selling to 'big box' retailers n=90)</b>	69%	50%	54%	85%	69%
% of 'big box' sales to Bunnings specifically (estimated) (base: n=78)	92%	68%	84%	92%	92%

NOTE: Data is for the 2024-25 year and not necessarily representative of sales in every year \*Caution sub sample smaller than n=30

## 4. Turnover per hectare (ha) and overall production area

Question asked: Q6. What is the total area of the business used for nursery production – and I would like you to give me outdoor area first and then undercover including greenhouses, cold frames, cloth houses and lath houses?

turnover per hectare \$000' (base: respondents able to answer)



### Key findings

- Extrapolated survey data suggests that nationally, the estimated turnover per hectare (combining outdoor and indoor areas) remains at approximately \$450,000 per hectare.
- Notably, this varies significantly by business size, from \$642,000 per hectare among large businesses to \$155,000 among small operators.
- The average outdoor area per business ranges from 1.2 ha among small enterprises to 8.1 ha for large counterparts, with a national average of 4.2 ha.
- Indoor production is widespread, with 81% of production businesses reporting indoor area and an average of 0.8 ha nationally.
- The total estimated outdoor area is estimated to be 6,592 ha and indoor area is 1,245 ha.

### Implications

These findings highlight the diversity and scale of nursery production operations in Australia. The wide range in turnover per hectare suggests varying levels of production efficiency, likely influenced by business size, operational practices and market focus.

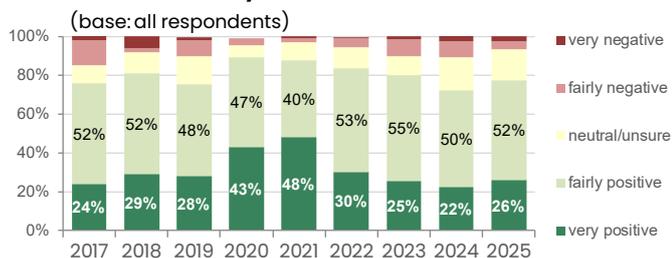
production area (hectares) (estimated)	% mentioning (base: respondents able to provide data)				
	national	turnover			don't know t/o*
		≤ \$500k	\$500,001 to \$2 million	> \$2 million	
<b>Estimated turnover per hectare (outdoor + indoor)</b>	\$445,191	\$154,679	\$231,571	\$642,446	NA
<b>Outdoor area (approximate)</b>					
Average ha per farm	4.2	1.2	4.0	8.1	2.9
Median ha per farm	1.1	0.5	1.0	3.2	2.0
Estimated total outdoor area (ha)	6,592	621	2,245	3,654	72
<b>Indoor area (approximate)</b>					
% of farms with indoor area	81%	80%	79%	86%	21%
Average ha per farm with indoor area	0.8	0.4	0.7	1.5	1.2
Median ha per farm with indoor area	0.2	0.0	0.2	1.0	0.0
Estimated total indoor area (ha)	1,245	219	367	633	26

↑ significant increase since 2024; ↓ significant decrease since 2024 \*Caution sub sample smaller than n=30

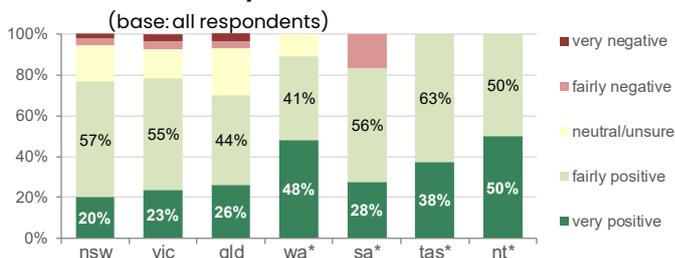
## 5. Industry confidence

Questions asked: Q18. Overall, how do you feel about the future of the nursery and garden industry?

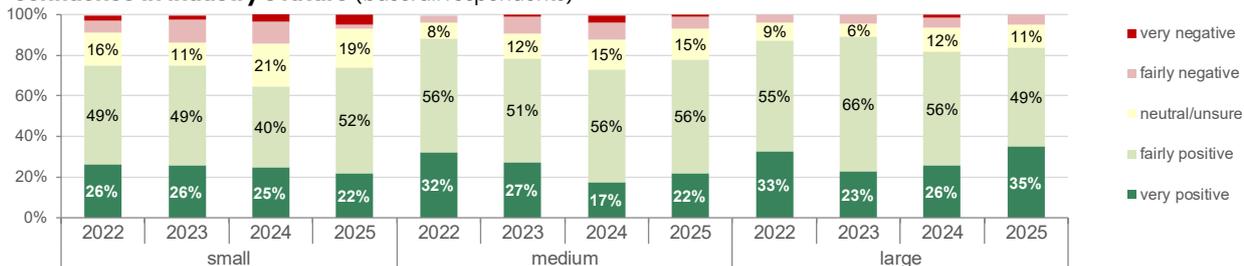
### confidence in industry's future



### confidence in industry's future x state



### confidence in industry's future (base: all respondents)



### Key findings

- Over the past 12 months, industry confidence has increased 6 points to 78%.
- Similarly, only 1 in 5 (6%) of respondents are negative towards the industry's future, down significantly from 11% in 2024.
- While not quite statistically significant due to small sample sizes (in WA), it varies by state from 89% in WA to 70% in QLD.
- Additionally, confidence varies among the following segments:
  - business phase (94% expanding to 69% in a steady phase)
  - expecting to be profitable in 2025-26 (82% versus 73% not expecting a profit)

### Implications

Despite remaining lower than during the COVID-19 related highs in 200 and 2021, in real terms, industry confidence remains high and in correlation with profitability, is more widespread than 12 months ago.

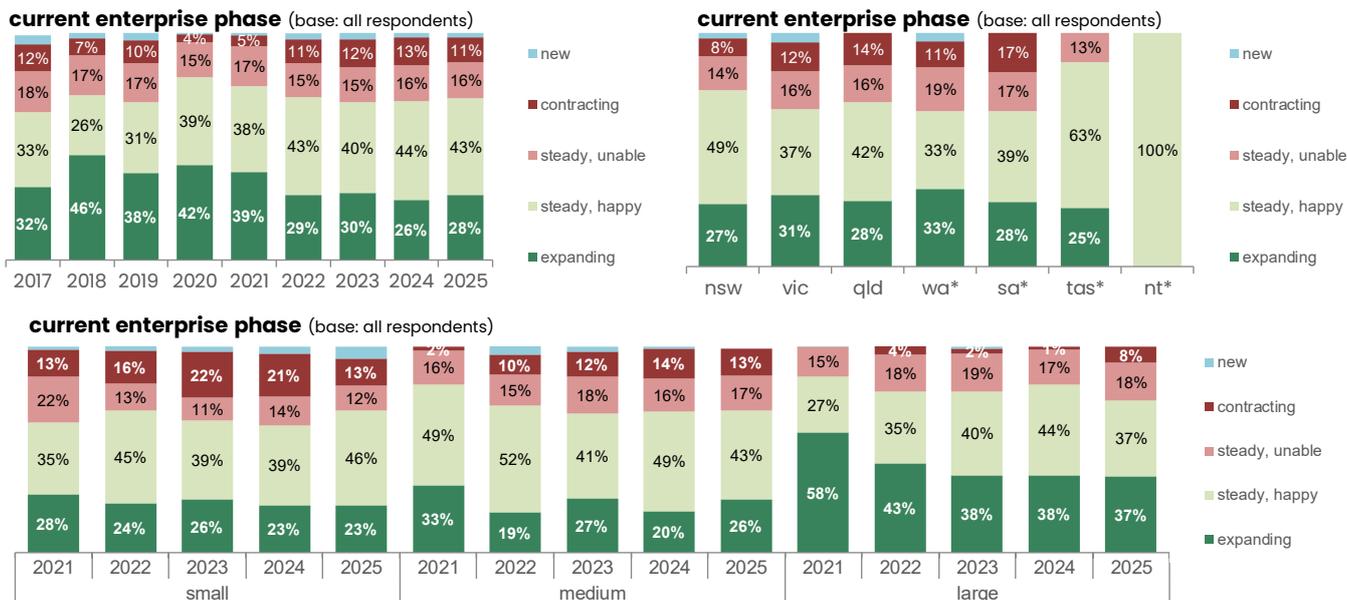
confidence	% mentioning (base: all respondents)				
	national (n=300)	turnover			
		≤ \$500k (n=108)	\$500,001 to \$2 million (n=101)	> \$2 million (n=86)	don't know t/o* (n=5)
Very positive	26%	22%	22%	35%	34%
Fairly positive	52%	52%	56%	49%	15%
Neutral	13%	16%	14%	9%	0%
Fairly negative	4%	2%	6%	5%	0%
Very negative	2%	5%	1%	0%	25%
Can't say	3%	3%	1%	3%	25%
Total: positive	78%	74%	78%	83%	50%
Total: negative	↓ 6%	↓ 6%	7%	5%	25%

↑ significant increase since 2024; ↓ significant decrease since 2024\* Caution sub sample smaller than n=30. Errors due to rounding

## 6. Current business phase and future intentions

### 6.1 Current business phase

Questions asked: Q16. Which of the following best describes your nursery business over the past few years?



#### Key findings

- Nationally, the proportion of business expanding has increased slightly over the past 12 months (28%, was 26% in 2024).
- Consistent with past results, this varies significantly from 37% of large businesses to 23% among small enterprises.
- However, it is notable that large businesses are significantly more likely to be contracting than 12 months ago (8%, up from 1%).
- As may be expected, respondents confident towards the industry's future and/or expecting to be profitable in 2025-26 are significantly more likely to be expanding their business than their counterparts.
- New business formation (2% nationally) is concentrated among small operators (6%).

#### Implications

Survey results show moderate shifts from contraction to expansion. Conversely a segment of larger businesses are now in contraction and while results suggest that this is likely due to an imminent sale of the business, this result should be monitored in future.

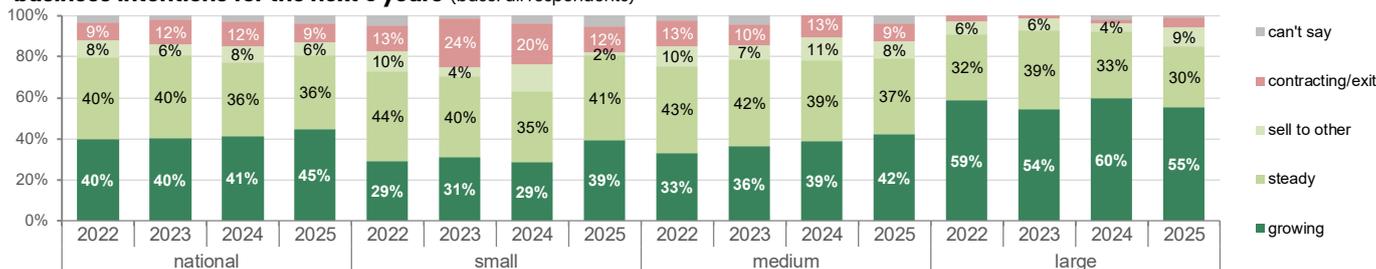
current business stage	% mentioning (base: all respondents)				
	national (n=300)	turnover			
		≤ \$500k (n=108)	\$500,001 to \$2 million (n=101)	> \$2 million (n=86)	don't know t/o* (n=5)
Expanding	28%	23%	26%	37%	34%
Steady, where want it to be	43%	46%	43%	37%	66%
Steady, unable to expand	16%	12%	17%	18%	0%
Contracting/winding down	11%	13%	13%	8%	0%
New business	2%	6%	0%	0%	0%

↑ significant increase since 2024; ↓ significant decrease since 2024\* Caution sub sample smaller than n=30. Errors due to rounding

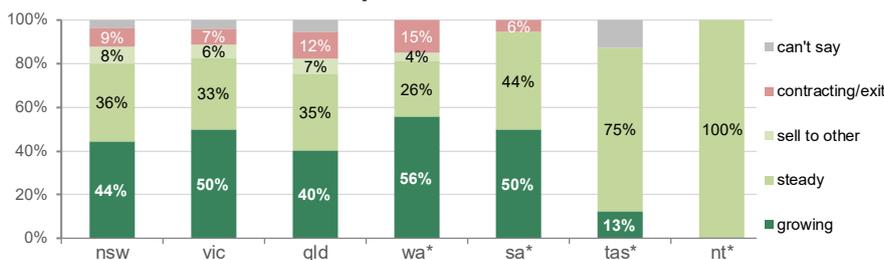
## 6.2 Future business intentions

Q17. At this point in time, what is the intention for the business over the next 5 years?

**business intentions for the next 5 years** (base: all respondents)



**business intentions for the next 5 years** (base: all)



### Key findings

- The proportion of respondents planning to grow their business over the next 5 years has increased 4 points year on year (now 45%) to be the highest result since 2020. This result is reflected across small and medium enterprises.
- However, large businesses remain significantly more likely to be planning expansion than their smaller counterparts, this includes 58% of those with turnover exceeding \$4 million.

- Notably, planning expansion in the next 5 years varies by state, from 56% in WA to 13% in Tasmania, with most of the latter planning to keep the business in a steady state.
- WA businesses are the most likely to be contracting or exiting (15%), with all of this group planning to sell their business to a developer.

### Implications

Consistent with increases in profitability and industry confidence there has been a slight rise in the number of businesses planning expansion over the next 5 years and notably, this intention is the most widespread since 2020.

future intentions for business	% mentioning (base: all respondents)				
	national (n=300)	≤ \$500k (n=108)	\$500,001 to \$2 million (n=101)	> \$2 million (n=86)	don't know t/o* (n=5)
Growing business	45%	39%	42%	55%	34%
Remaining steady	36%	41%	37%	30%	15%
Contracting/winding down	3%	2%	3%	3%	25%
Sell as business to other person/company	6%	2%	8%	9%	0%
Sell land to developer	2%	2%	2%	2%	0%
Close business	5%	8%	5%	0%	0%
Can't say	4%	5%	4%	1%	25%

\*Caution sub sample smaller than n=30.

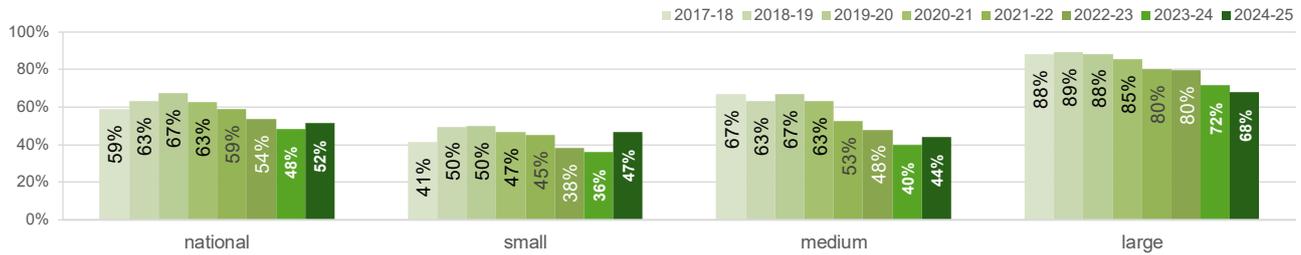
## 7. Business investment

Question asked:

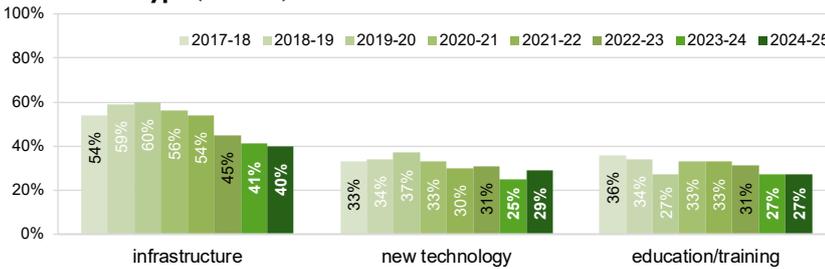
Q24. During the 2024-25 financial year, did you invest in either infrastructure or new technology or training and education for the business?

Q25. If yes: Approximately how much did you invest in infrastructure? Q26. If yes: Approximately how much did you invest in new technology?

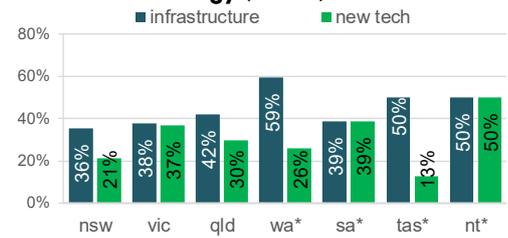
### % investing in own business infrastructure or new technology (base: all)



### investment type (base: all)



### % investing in infrastructure or new technology (base: all)



### Key findings

- A slightly greater proportion of production businesses invested in infrastructure or new technology in 2024-25 (52%) than in 2023-24 (48%).
- While this practice remains significantly more widespread among large businesses than smaller counterparts, the downward trend among the former is notable (68% of large businesses down from 72% in 2023-24 and 80% in 2022-23).
- Investment in infrastructure or new technology varied by state, from 67% of WA respondent businesses to 43% of NSW counterparts.
- Nationally, there was no statistically significant variation from 2023-24 in the proportion of businesses investing in infrastructure (40%, was 41%), new technology (29%, up slightly from 25%) and education or training (27%, on par with 2023-24).

### Implications

Business investment continues to correlate with trends in profitability, business expansion and industry confidence, however, this is not the case among large businesses where a downward trend in investment is evident. This result should be monitored in future surveys.

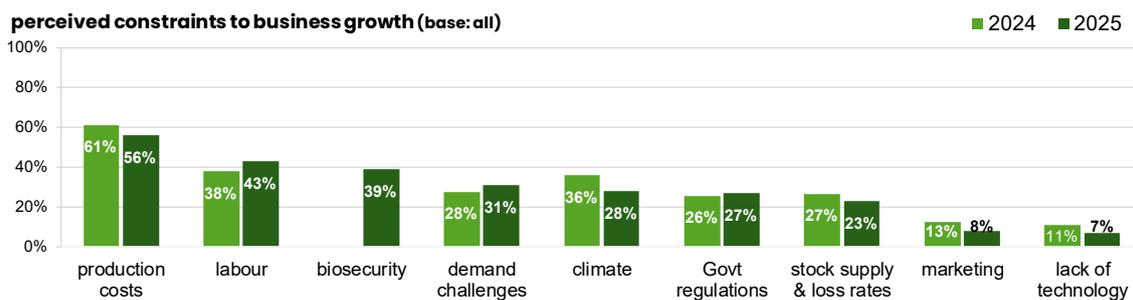
business investment	% mentioning (base: all respondents able to answer)				
	national	turnover			don't know t/o*
		≤ \$500k*	\$500,001-\$2 mil*	> \$2 million	
% making business investment in infrastructure or new technology	52%	47%	44%	68%	41%
% investing in infrastructure	40%	36%	32%	56%	41%
Average amount invested in infrastructure (base: those investing)	\$192,481	\$28,524	\$136,629	\$340,201	NA
Total invested in infrastructure (extrapolated)	\$103,427,652	\$4,374,708	\$21,191,559	\$77,861,384	NA
% investing in new technology	29%	25%	26%	39%	0%
Average amount invested in new technology (base: those investing)	\$76,628	\$15,329	\$91,917	\$104,809	NA
Total invested in new technology (extrapolated)	\$28,304,874	\$1,551,765	\$9,634,639	\$17,118,470	NA
% investing in education and training	27%	17%	26%	41%	0%

📈 significant increase since 2023-24; 📉 significant decrease since 2023-24

\*Caution sub sample smaller than n=30.

## 8. Perceived constraints to growth

Question asked: Q20. Which of the following, if any, are key constraints to growing your business?



### Key findings

- When prompted, 9 in 10 (91%) production businesses identified at least one constraint to growing their business.
- Production costs (56% mentioning), labour shortages/issues (43%) and biosecurity (39%) were the most commonly nominated constraints.
- Of note, 73% of businesses with turnover exceeding \$4 million believe production costs are inhibiting growth and half (50%) perceive labour issues or shortages a constraint.
- QLD businesses (54% mentioning) are significantly more likely to mention biosecurity issues are a constraint than counterparts in other states.
- Product demand is constraining growth among a greater proportion of NSW enterprises (41%) than those in Vic (32%), QLD (25%), WA (19%) and TAS (13%).

### Implications

Rising input costs and labour shortages are the most pressing challenges for the nursery industry, particularly for larger operators.

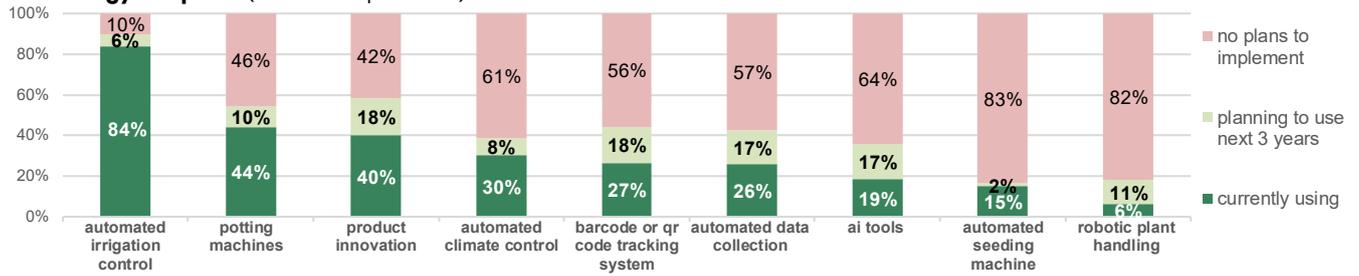
The prevalence of biosecurity, regulatory and environmental concerns highlight the complexity of the operating environment.

perceived constraints to growth	national (n=300)	% mentioning (base: all respondents)			
		turnover			
		≤ \$500k (n=108)	\$500,001 to \$2 million (n=101)	> \$2 million (n=86)	don't know t/o* (n=5)
Cost of production/input costs	56%	50%	55%	66%	41%
Labour shortages/issues	43%	35%	45%	51%	31%
Biosecurity (managing pests and weeds)	39%	37%	39%	40%	25%
Plant demand/competition/ finding markets	31%	35%	36%	23%	0%
Climate/water availability	28%	26%	32%	27%	34%
Government/environmental regulations	27%	16%	30%	38%	25%
Managing stock, supply and loss rates	23%	26%	25%	17%	25%
Nursery industry marketing	8%	3%	12%	10%	0%
Lack of technology	7%	7%	7%	9%	0%
None	9%	12%	10%	4%	0%

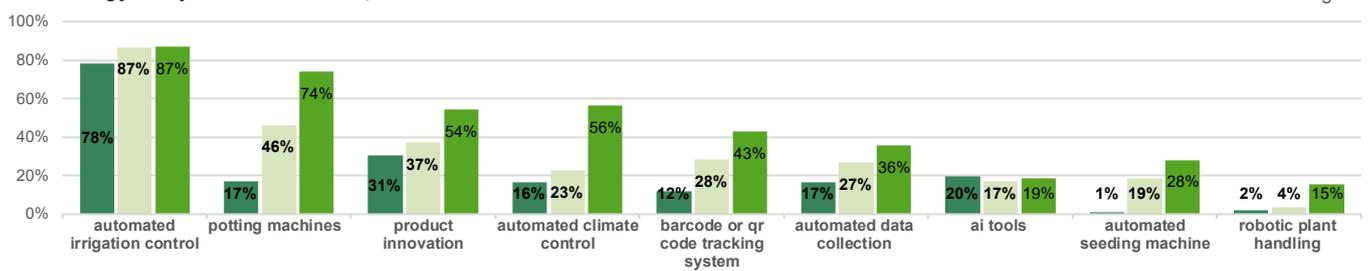
## 9. Adoption of new technology

Question asked: Q19. For the issues listed below, how much impact are they currently having on your business?

**technology adoption** (base: all respondents)



**technology adoption** (base: all respondents)



### Key findings

- Currently, the most widely implemented technologies are automated irrigation control (84%) and potting machines (44%)
- Advanced technologies like automated seeding machines (15%) and robotic plant handling (6%) have the lowest adoption rates.
- Notably, compared to smaller counterparts large operators are more likely to have adopted each of the technologies tested, apart from AI tools.
- Of note, automated climate control is more widespread among the southern and cooler states than northern and western counterparts.
- Over the next 3 years, product innovations (18%), barcode or QR code tracking systems (18%) and/or automated data collection or Ai Tools (each 17%) are the technologies most likely to be adopted.

### Implications

Basic automation (especially irrigation) is almost standard practice among production nurseries, but the adoption of more advanced technologies, such as AI, robotics and automated data systems remains limited, particularly among smaller operators.

technology adoption	current and future impact (% mentioning - base: all respondents; n = 300)		
	Currently using	Planning to use next 3 years	No plans to implement
Automated irrigation control	84%	6%	10%
Potting machines	44%	10%	46%
Product innovation (e.g. plant varieties and packaging)	40%	18%	42%
Automated climate control	30%	8%	61%
Barcode or QR code tracking system	27%	18%	56%
Automated data collection to assist decision making (e.g. dashboard)	26%	17%	57%
AI tools to guide decision making (e.g. AI understanding of productivity /performance)	19%	17%	64%
Automated seeding machine	15%	2%	83%
Robotic plant handling	6%	11%	82%

technology usage	% mentioning (base: all respondents)				
	national (n=300)	turnover			don't know t/o* (n=5)
		≤ \$500k (n=108)	\$500,001 to \$2 million (n=101)	> \$2 million (n=86)	
Automated irrigation control	84%	78%	87%	87%	100%
Potting machines	44%	17%	46%	74%	46%
Product innovation (e.g. plant varieties and packaging)	40%	31%	37%	54%	41%
Automated climate control	30%	16%	23%	56%	54%
Barcode or QR code tracking system	27%	12%	28%	43%	0%
Automated data collection to assist decision making (e.g. dashboard)	26%	17%	27%	36%	0%
AI tools to guide decision making (e.g. AI understanding of productivity /performance)	19%	20%	17%	19%	21%
Automated seeding machine	15%	1%	19%	28%	0%
Robotic plant handling	6%	2%	4%	15%	21%

\*Caution sub sample smaller than n=30.

## 10. Industry workforce

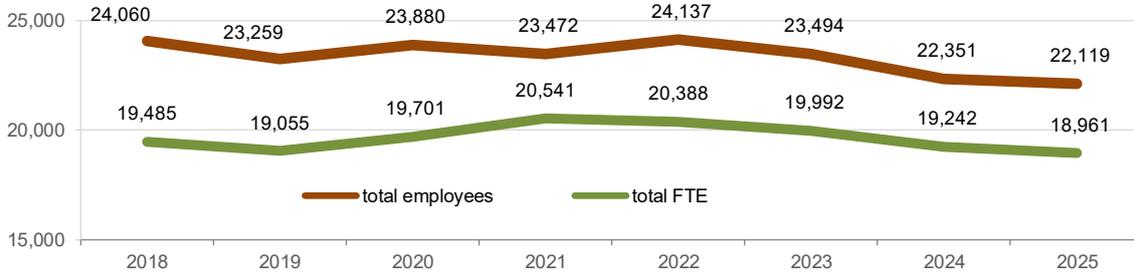
### 10.1 Number of people employed

Questions asked:

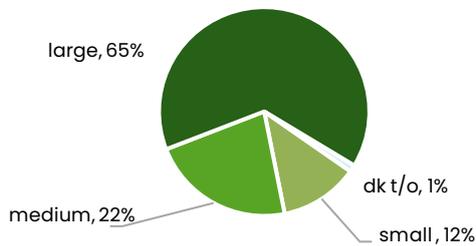
Q3. How many people including yourself are employed in the business in each of the States it operates in?

Q4. And what would be the full time equivalent for each of the following in the States you operate in?

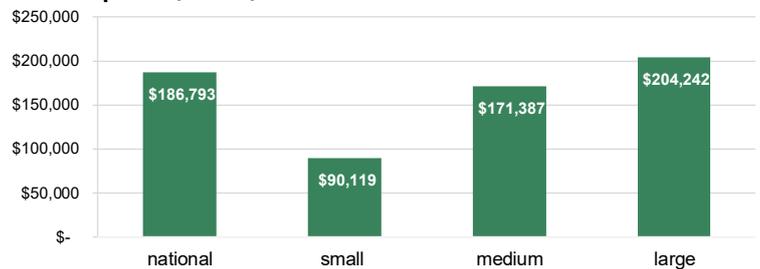
estimated total industry employment numbers (base: able to answer)



share of national workforce x business size



turnover per FTE (base: all)



#### Key findings

- Extrapolated survey data suggests that Australian production nurseries employ a similar number of people compared to 2023-24 (22,119) and the full-time equivalent (FTE) has also remained consistent (18,961).
- Large businesses are estimated to represent 65% of the industry's workforce.
- The average national turnover per FTE is estimated to be approximately \$187,000, higher among large businesses (\$204,242) than small (\$90,000) and medium (\$171,000) operators.

#### Implications

Larger nurseries not only employ the majority of the industry's workforce but also achieve significantly higher turnover per FTE, indicating greater operational efficiency and productivity.

total people employed by production greenlife nurseries (estimated)	% mentioning (base: all respondents able to answer)				
	national	≤ \$500k	\$500,001 to \$2 mil	> \$2 million	don't know t/o*
Total people employed	22,119	2,687	4,920	14,278	234
Full time equivalent	18,961	1,378	3,743	13,592	248
Turnover per FTE	\$186,793	\$90,119	\$171,387	\$204,242	NA

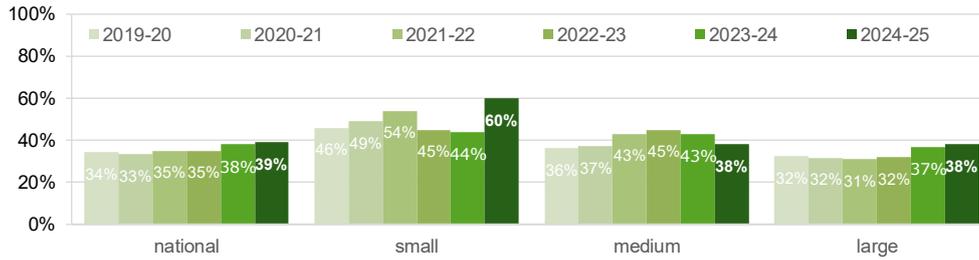
📈 significant increase since 2024; 📉 significant decrease since 2024 \*Caution, sub sample smaller than n=30

## 10.2 Wages paid

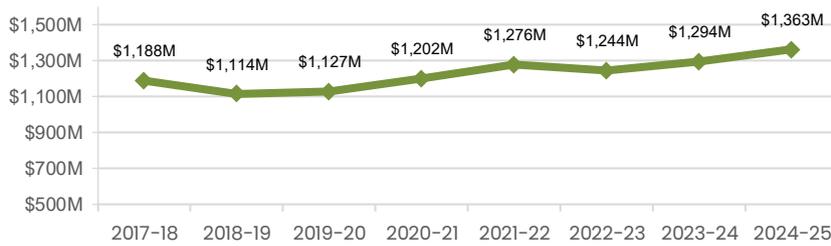
Question asked:

Q5. What was the total cost of wages for the business in the 2024-25 financial year, including your own?

**% turnover spent on wages (average)** (base: respondents able to provide details)



**estimated total industry wage costs (\$000,000)** (base: able to answer)



### Key findings

- Extrapolated survey data suggests that the total cost of wages paid by Australian production nurseries in 2024-25 was approximately \$1.36 billion, up from 1.29 in 2023-24.
- Wages continue to account for a growing proportion of total national turnover nationally (now 39%, was 38% in 2023-24).
- The average wage based on full-time equivalent (FTE), including owners, was approximately \$72,000 nationally, with small businesses averaging \$56,000, medium businesses (\$62,000) and large (\$78,000).
- It should be noted the figures represented in this section include wages paid to business owners and variation in profitability is likely to result in the fluctuation seen in businesses turning over less than \$2 million.

### Implications

Labour costs represent a substantial and growing portion of operating expenses for production nurseries. Smaller operators may face greater financial pressure and less flexibility in managing wage costs compared to larger counterparts. However, the latter is more likely to be constrained by labour shortages.

cost of wages in 2024-25 (estimated)	% mentioning (base: all respondents able to answer)				
	national	≤ \$500k	\$500,001-\$2 mill	> \$2 million	don't know t/o*
Approximate total cost of wages	\$1,363,389,471	\$77,622,543	\$230,988,095	\$1,054,778,833	\$1,363,389,471
Average wage based on FTE (including owners)	\$71,906	\$56,330	\$61,708	\$77,604	\$71,906
% of turnover spent on wages (average, including owners)	39%	60%	38%	38%	39%

\*Caution, sub sample smaller than n=30.

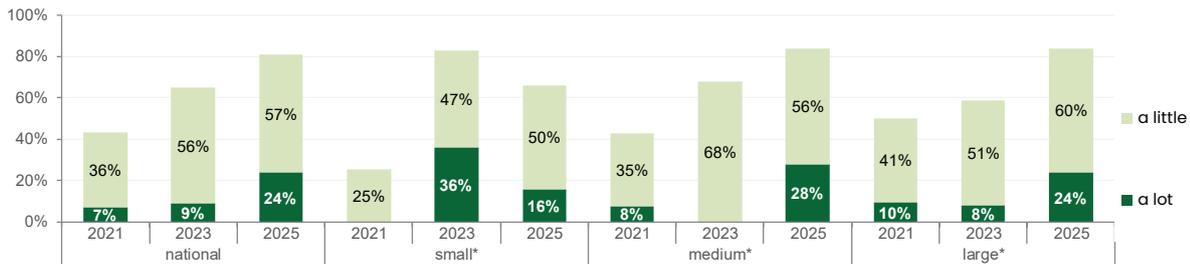
# 11. Benchmarking Tool usage

Questions asked: Q27. Have you or someone within your business used the benchmarking data tool that is sent to those completing a nursery statistics survey or is available on request through Hort Innovation or Greenlife Industry Australia?  
 Q29. Has using the benchmarking tool influenced your business management decisions in any way at all?

% of all businesses using benchmarking tool (base: all respondents)



influence on decision making (base: respondents using tool/able to answer)



## Key findings

- Approximately 1 in 5 (18%) of all production nursery businesses have used the benchmarking tool provided to survey respondents and available on request through Hort Innovation.
- Tool usage varies significantly by:
  - Business size (29% of large to 12% of small operators)
  - State (28% in SA to 11% in QLD)
- Among those using the Tool, a growing proportion (now 80%) believe it influences business management decisions either a lot (24%) or a little (57%).
- Notably, the proportion of users saying it has a lot of influence has increased significantly since 2023 (24%, up from 9%).

## Implications

A reasonable proportion of the industry have now used the benchmarking data tool developed based on the data collected in this survey. Encouragingly, it appears to be impacting business decisions for a growing proportion of users.

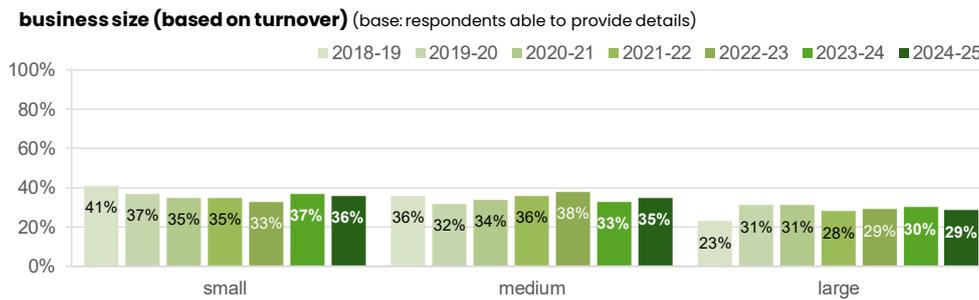
benchmarking tool usage	% mentioning (base: all respondents)				
	national (n=300)	≤ \$500k (n=108)	\$500,001 to \$2 million (n=101)	> \$2 million (n=86)	don't know t/o* (n=5)
Used benchmarking tool	18%	12%	16%	29%	0%
Have not used tool	67%	66%	71%	61%	75%
Have not received the data tool	6%	10%	2%	5%	0%
Unsure if received/used	10%	11%	12%	5%	25%

\*Caution sub sample smaller than n=30.

impact of benchmarking tool usage	% mentioning (base: respondents using tool/able to answer)				
	national (n=50)	≤ \$500k (n=12)*	\$500,001-\$2 mill (n=14)*	> \$2 million (n=24)*	don't know t/o* (n=0)*
Total: tool influenced decision making	80%	66%	85%	84%	80%
A lot of influence	↑ 24%	16%	28%	24%	24%
A little influence	57%	50%	56%	60%	57%
No influence	20%	34%	15%	16%	20%

↑ significant increase since 2022-23; ↓ significant decrease since 2022-23\*Caution sub sample smaller than n=30

## 12. Organisation size (based on survey sample)



### Key findings

- Consistent with past survey waves, the survey sample provides a spread of businesses sizes.

### Implications

The survey continues to include participants from a range of business sizes, indicating the sample is likely to be representative of the overall industry population.

business turnover	% mentioning (base: respondents able to provide data)	
	2023-2024 year 2024 survey	2024-25 year 2025 survey
Less than \$500,000	37%	36%
\$500,000 to \$1,000,000	19%	18%
\$1,000,001 to \$1,500,000	9%	8%
\$1,500,001 to \$2,000,000	7%	9%
\$2,000,001 to \$2,500,000	5%	6%
\$2,500,001 to \$3,000,000	5%	5%
\$3,000,001 to \$3,500,000	3%	2%
\$3,500,001 to \$4,000,000	2%	2%
\$4,000,001 to \$4,500,000	2%	2%
\$4,500,001 to \$5,000,000	1%	1%
\$5,000,000 to \$10,000,000	7%	6%
\$10 million+	4%	6%

## 13. Sample demographics

demographic metric	% of sample (base: all respondents)				
	national (n=300)	≤ \$500k (n=108)	\$500,001 to \$2 million (n=101)	> \$2 million (n=86)	don't know t/o* (n=5)
<b>Age:</b>					
18 to 39 years	11%	9%	12%	13%	0%
40 to 59 years	49%	39%	50%	58%	69%
60 and older	40%	52%	38%	28%	31%
Average age	55	58	55	52	54
<b>Average years business operated:</b>	33	26	30	45	16
<b>Gender:</b>					
Male	74%	67%	76%	80%	66%
Female	26%	33%	24%	20%	34%
<b>Respondent role:</b>					
Owner or joint owner of the business	73%	77%	74%	69%	59%
Manager	24%	22%	22%	28%	41%
Admin/Accounts	2%	1%	3%	3%	0%

↑ significant increase since 2024; 
 ↓ significant decrease since 2024 
 \*Caution, sub sample smaller than n=30.

## Appendix 1: Confidentiality statement

29 September 2025

### Nursery and Garden Industry Data & Statistics Collection

#### Confidentiality Statement

**Thank you for your interest in contributing data to Hort Innovation's NY21000 – Nursery Industry Research and Statistics Project.**

This strategic levy investment, part of the Hort Innovation Nursery Fund, aims to deliver accurate, timely industry statistics to support strategy development, decision-making, advocacy, and investment.

Data will be securely collected and stored by Market Metrics Data Collection, an independent, accredited firm based in Frankston, Victoria. You can learn more about their services at [www.marketmetrics.com.au](http://www.marketmetrics.com.au). All data collected will be used solely for this project.

In line with Australia's Privacy Principles, full confidentiality is assured. Once processing is complete, identifying details (e.g. name, company, contact information) will be removed. During interviewing, Market Metrics retains identifiable data only to allow for clarification if needed. De-identification occurs immediately after this stage.

Following data collection, Down To Earth Research (DTER) and Acil Allen Consulting (who produce the benchmarking tool) will receive a de-identified dataset for analysis. DTER will then prepare the final industry report for Hort Innovation. No one from Hort Innovation, industry bodies, government departments, or the nursery and garden industry will know who participated or what data was provided. DTER's privacy policy is available at [www.dter.com.au/privacy-statement](http://www.dter.com.au/privacy-statement).

If you have any questions or concerns, please contact:

- Daniel Watson – DTER: [daniel@dter.com.au](mailto:daniel@dter.com.au) | 0409 775 553 or
- Violet Edwards – Hort Innovation: [Violet.Edwards@horticulture.com.au](mailto:Violet.Edwards@horticulture.com.au) | 02 8295 2300.

Thank you again for your support. Your input will help Hort Innovation and Greenlife Industry Australia engage more effectively with government and provide your business with benchmarking insights to better understand the size and nature of the industry.

Kind regards



Dan Watson  
Research Director  
Down To Earth Research

## Appendix 2: Survey instrument

- Q1. Firstly, I need to clarify how many sites your nursery business operates from?
- Q2. Which states and territories are the sites located in?
- Q3. How many people including yourself are employed in the business in each of the States it operates? *Please exclude volunteers, but include all seasonal, casual, part time and full time workers.*
- Q4. And what would be the total full time equivalent (so 38 hours per week, including business owners) for each of the States you operate in? *read out*
- Q5. (By State if operate in more than one State), what was the total cost of wages (inclusive of superannuation) for the business in the 2024-25 year, including your own?

If only 1 site OR more than 1 site, but in the same State, ask:

- Q6. What is the total area of the business used for nursery production – and I would like you to give me outdoor area first and then undercover including greenhouses, cold frames, cloth houses and lath houses?
- Q7. (By State if operate in more than one State) In the 2024-25 financial year, what was the total value (including resale) excluding GST of plants sold to ...

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
<b>Wholesale nurseries:</b>								
<b>Retail nurseries:</b>								
<b>Revegetation:</b>								
<b>Forestry:</b>								
<b>Local, State &amp; Federal government</b> departments including water corporations, RTA, schools, etc:								
<b>Landscapers, developers and builders:</b>								
<b>Primary industry:</b>								
<b>Direct to consumers/public:</b>								
<b>Other</b> (specify)								
Only able to provide total sold/total:								
<b>TOTAL</b>								

- Q8. During the 2024-25 financial year, how many plants did you sell in the following categories (including resale)?

- Q9. And what was the total value of (from Q8) plants sold (including resale)?

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
<b>Propagation plants</b> (e.g., plugs, tubestock, cuttings, tissue culture):								
Number of plants								
Value								
<b>Herbs and vegetables</b> (excluding seeds and bulbs):								
Number of plants								
Value								
<b>Fruit trees, nut trees and vines</b> (excluding seeds and bulbs):								
Number of plants								
Value								
<b>Bedding and potted colour</b> (eg. annuals):								
Number of plants								
Value								
<b>Indoor plants</b> (including patio, but excluding seeds, bulbs):								
Number of plants								
Value								
<b>Trees:</b>								
Number of plants								
Value								
<b>Shrubs, groundcovers etc.</b>								
Number of plants								
Value								
<b>Other (including seeds, bulbs, water plants, shot seed, etc.): (please specify) DP note: allow for more than 1 other</b>								
Number of plants								
Value								
<b>TOTAL</b> (computer calculate and confirm with respondent):								
Number of plants								
Value								

If sell to retail (Q7 retail does not equal 0), ask Q13. Others go to Q15

- Q10. In 2024-25 did you sell plants to 'big box' retailers such as Bunnings, Mitre 10, Coles, Aldi or other large retailers?

- Q11. In total, what percentage of your sales to retail nurseries went to these 'big box' retailers? \_\_\_\_\_ %

- Q12. what percentage by value of your sales to retail nurseries are to Bunnings exclusively?

- Q13. Do you know what your business's total operating costs or expenses were for the 2024-25 financial year, so this includes input costs, wages, cost of goods sold, transport costs/freight, rent etc?

- Q14. And what were your total operating costs or expenses (including input costs, wages, cost of goods sold, transport costs, rent) for the 2024-25 year? \_\_\_\_\_\$ \_\_\_\_\_
- Q15. Approximately what proportion of your business turnover was taken up by operating costs or expenses for the 2024-25 financial year? \_\_\_\_\_%
- Q16. Which of the following best describes your nursery business currently. Is it ...
- In an expansion phase ----- 1
  - In a steady phase because it was difficult to expand ----- 2
  - In a steady phase because it is where it needed to be ----- 3
  - In a contracting or winding down phase ----- 4
  - A new business just starting up ----- 5
- Q17. At this point in time, what is the intention for the business over the next 5 years? Is the intention ...
- To grow the business ----- 1
  - Keep the business in a steady phase ----- 2
  - Contract or wind down the business ----- 3
  - Sell it as a business to another person or company ----- 4
  - Sell the land to a developer ----- 5
  - Wind down and close ----- 6
  - Can't say ----- 7
- Q18. Overall, how do you feel about the future of the greenlife industry? Would you say you feel ... (read out)
- Very positive ----- 1
  - Fairly positive ----- 2
  - Fairly negative ----- 3
  - Very negative ----- 4
  - Do not read Neutral ----- 5
  - Do not read Unsure ----- 6
- Q19. For each of the following technologies, please indicate whether your business is currently using, planning to implement within the next 3 years or has no plans to implement?

		Currently using	Planning to use next 3 years	No plans to implement	Unsure
A	Automated irrigation control	1	2	3	4
B	Automated climate control	1	2	3	4
C	Potting machines	1	2	3	4
D	Robotic plant handling	1	2	3	4
E	Barcode or QR code tracking system	1	2	3	4
F	Automated data collection to assist decision making (e.g. dashboard)	1	2	3	4
G	Automated seeding machine	1	2	3	4
H	AI tools to guide decision making (e.g. AI understanding of productivity /performance)	1	2	3	4
I	Product innovation (e.g. plant varieties and packaging)	1	2	3	4
J	Other (specify)	1	2	3	4

- Q20. Which of the following, if any, are key constraints to growing your business?
- Q21. In the 2024-25 financial year, did your nursery business make an operating profit?
- Q22. And do you expect to make an operating profit in the 2025-26 financial year?
- Q23. Compared to the average of the past 5 years, do you expect profit levels for the 2025-26 financial year to be
- Considerably higher ----- 1
  - Slightly higher ----- 2
  - About the same ----- 3
  - Slightly lower ----- 4
  - Considerably lower ----- 5
  - Don't know yet ----- 6
- Q24. During the 2024-25 financial year did you invest in either infrastructure, new technology or training and education for the business?
- Yes, new infrastructure ----- 1
  - Yes, new technology ----- 2
  - Yes, training and education ----- 3
  - No ----- 4
- Q25. Approximately how much did you invest in new infrastructure during 2024-25? \_\_\_\_\_
- Q26. Approximately how much did you invest in new technology for the business during 2024-25?

Ask all:

Q27. Have you or someone within your business used the benchmarking data tool that is sent to those completing a nursery statistics survey or is available on request through Hort Innovation or Greenlife Industry Australia?

If Q27 = code 1, ask:

Q28. Has using the benchmarking tool influenced your business management decisions in any way at all?

- Yes, a lot ----- 1
- Yes, a little----- 2
- No ----- 3
- Can't say/unsure ----- 4

Q29. May I ask your age please? \_\_\_\_\_

Q30. And how many years has your nursery business operated for? \_\_\_\_\_

Q31. Are you the ...

- Owner or joint owner of the business ----- 1
- Manager ----- 2
- Other role (specify) ----- 3

Q32. Record gender