FACTS AT A GLANCE

The Australian Nursery Industry 2024-25

Greenlife Industry Australia

The Australian nursery sector remained resilient in 2024-25, with production nurseries recording a 3% year-on-year increase in total sales and supplying an estimated 2.13 billion plants. Grower confidence remained strong, pointing to steady conditions after a softer 2023-24.

This resilience sits alongside continued pressure on business performance. While demand for greenlife remains broad across residential, commercial and environmental markets, input costs, labour shortages and biosecurity continued to constrain growth for many growers.

The *2024-25 Production Nursery Data Capture Report* highlights three clear messages: the industry remained resilient, market demand stayed broad across channels, and growers continued to face persistent cost and operating pressures. Together, these findings present a picture of a sector that is performing steadily while adapting to ongoing challenges.

INDUSTRY PROFILE

$2.76 billion in sales excluding double counting, or $3.49 billion including sales to wholesalers

2.13 billion plants sold nationwide.

22,100 people employed, including approximately 19,000 FTEs

$445,000 turnover per hectare.

Average wage per FTE: $71,900, with wages representing 39% of total turnover

SALES REVENUE*

2022-23	$2.79 BILLION
2023-24	$2.65 BILLION
2024-25	$2.76 BILLION

PLANTS SOLD

2022-23	2.44 BILLION
2023-24	2.06 BILLION
2024-25	2.13 BILLION

TURNOVER (PER/HA)

2022-23	~$456K
2023-24	~$446K
2024-25	~$445K

** Excluding double counting*

FUNDED BY THE NURSERY LEVY

The *'Nursery Industry Statistics 2020-21 to 2024-25'* (NY21000) project has been funded by Hort Innovation, using the nursery industry research and development levy and contributions from the Australian Government.

Hort Innovation NURSERY FUND

FACTS AT A GLANCE

Industry profile

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CONFIDENCE, INVESTMENT AND MARKET SIGNALS

- **78% of growers** are confident about the future of the sector
- **45% of businesses** intend to grow over the next five years
- **52% of businesses** invested in infrastructure or new technology in 2024-25
- **29% of businesses** invested specifically in new technology
- **Average national turnover** per FTE was $186,793
- **84% of nurseries** currently use automated irrigation control, making it the most widely adopted technology

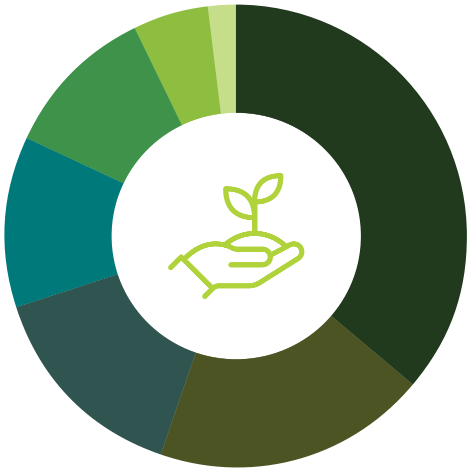
SALES CHANNELS AND MARKET ACTIVITY

Demand for nursery products remained broad in 2024-25, with sales spread across retail, wholesale and project-based channels.

- The retail supply chain remained the largest sales channel, accounting for **$1.48 billion, or about 42% of total sales** including wholesaler sales
- **Sales to landscapers, developers and builders reached $519 million**, the highest level recorded in the survey series
- Sales to big box retailers rose to **$875 million**, representing 59% of retail sales
- Bunnings accounted for **92% of big box sales**

PRODUCTION CATEGORIES

BY SHARE OF BUSINESSES SELLING EACH CATEGORY IN 2024-25



- **61%** Perennials, trees, and shrubs
- **32%** Propagation plants
- **25%** Indoor plants
- **20%** Fruit trees, nut trees and vines
- **18%** Bedding and potted colour
- **9%** Herbs and vegetables
- **3%** Other.

BY TOTAL SALES VALUE IN 2024-25

- Perennials, trees and shrubs: **$1.57 billion**
- Propagation plants: **$432.5 million**
- Indoor plants: **$387.2 million**
- Fruit trees, nut trees and vines: **$234.1 million**
- Bedding and potted colour: **$378.0 million**
- Herbs and vegetables: **$326.5 million**
- Other: **$161.3 million**

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KEY CONSTRAINTS TO GROWTH

While confidence remained strong, growers continue to report a consistent set of barriers to expansion:

56% identified cost of production or input costs as a key constraint

43% identified labour shortages or labour issues

39% identified biosecurity

31% identified plant demand, competition or finding markets

28% identified climate or water availability

27% identified government or environmental regulations

BENCHMARKING AND BUSINESS IMPROVEMENT

The 2024-25 survey results contribute to the Nursery Industry Business Benchmarking Tool, which helps growers compare performance, identify opportunities and make more informed business decisions.

Encouragingly, 18% of businesses have used the tool, and 80% of those users say it has influenced business decision-making either a lot or a little.

LOOKING AHEAD

The 2024-25 results show an industry that continues to perform steadily despite persistent pressures. Sales improved, grower confidence remained strong, and more businesses are planning for growth, even as input costs, labour shortages and biosecurity remain significant constraints.

The overall picture is of a resilient sector with broad market demand and clear opportunities for businesses that use industry data to benchmark performance and make informed decisions.

WANT TO COMPARE YOUR BUSINESS AGAINST THE INDUSTRY BENCHMARK?

Contact Celeste Cook to access the Nursery Industry Business Benchmarking Tool
celeste.cook@greenlifeindustry.com.au

Read the full 2024-25 Production Nursery Data Capture Report separately:
www.greenlifeindustry.org.au/news/2024-25-data-capture-report

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