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**Greenlife
Industry Australia**

ACIL ALLEN

Nursery Industry Statistics 2020–21 to 2024–25 (NY21000)

2023–24 Production Nursery Data Capture Report

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**Hort
Innovation**
Strategic levy investment

**NURSERY
FUND**

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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 for 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 eighth nursery industry statistics study and fourth wave under the umbrella Project NY21000 captures 2023–24 financial year data from production nurseries to inform timely decision making, resource prioritisation, investment evaluation and strategic planning activities among greenlife businesses and wider industry.

The data collected also tracks industry trends and informs the development of a business benchmarking tool distributed to all survey participants and upon request to other levy payers.

Methodology

The 2023–24 methodology remains consistent with prior survey waves, with minor alterations implemented to maximise survey participation and minimise potential biases.

297 completed surveys were received (slightly less than the target of 300), 171 via Computer Assisted Telephone Interviews (CATI), 56 via email and 69 via an online platform.

The margin for error nationally based on 297 interviews is $\pm 5.1\%$ (where the total sample responds). Consistent with past surveys, 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 overall, production nursery sales saw a modest year on year decline of between 4% and 5% to be valued at approximately \$3.38 billion in 2023–24. Excluding sales to other production businesses to avoid double counting plants sold, the industry contributed an estimated \$2.65 billion to the economy.

The retail supply chain remains the largest sales channel (41% of total sales value), followed by other wholesale nurseries (22%). However, sales to these channels have declined over the past 2 years. Conversely, sales to the landscape, builder and developer channel have risen, now accounting for 15% of the total sales value.

Year on year sales of perennials, trees and shrubs category remained steady and now represent 47% of the total value of industry sales (up from 45% in 2022–23). Within this category, sales are estimated to be split relatively evenly between trees and shrubs/groundcovers.

By category, sales of indoor, propagation, herbs and vegetables, bedding/potted colour, fruit, nuts and vines, each continue to represent approximately 10% of the value of overall production nursery sales.

Sales to 'big box' retailers

In 2023–24, 32% of businesses sold plants to 'big box' retailers, equivalent to 48% of those selling to the retail sector (both 'big box' and independent retailers).

Year on year, the total value of plants sold to 'big box' retailers remained steady and were estimated to be valued at approximately \$830 million in 2023–24 (compared to \$844 million in 2022–23) and accounted for 60% of all sales to the retail channel (up from 58% in 2022–23).

Extrapolated survey data suggests that Bunnings represents the bulk of this channel. Almost 4 in 5 (78%) businesses selling plants to 'big box' retailers sell to Bunnings, with sales to the retailer estimated to represent 55% of total retail channel sales, equivalent to approximately 90% of the value sold to 'big box' retail. However, caution is required interpreting these results due to relatively small sample sizes and a large proportion of businesses declining to answer or unable to provide these figures.

Current industry sentiment and future operating plans

While in real terms, confidence towards the industry's future remains relatively widespread, it has trended downwards since 2020 and dipped a significant 8 points over the past year to the lowest result since data collection began in 2017 (72%).

Similarly, a downwards trend is evident in the proportion of respondent businesses expanding (26% - also the lowest results since the survey's inception), while the proportion contracting or winding down has trended upwards (now 13%).

However, contraction remains almost exclusively among those with a turnover of less than \$2 million.

Despite these figures, over the next five years a large proportion of businesses (41%) plan to grow, including a very high 60% of large businesses.

While 1 in 10 respondent businesses expect to contract or exit the industry, this is again likely to be smaller operators.

Business investment

Consistent with declining profitability and confidence, the proportion of respondent businesses investing in either new infrastructure and/or technology has trended downward since 2019–20 and in 2023–24 was the lowest proportion since the survey's inception (48%).

Employment and wages

Extrapolated survey data suggests that nursery production businesses employ slightly fewer people than in 2023 (22,500, down from 23,500 respectively).

Similarly, the Full Time Equivalent (FTE) dipped slightly, with greenlife production businesses estimated to employ the equivalent of approximately 19,000 full time staff (based on a 37.5 hour work week).

Turnover per FTE remained steady however (approximately \$185,000), and continues to be significantly higher among large businesses (\$210,000), compared to small operators (\$70,000).

Production nurseries are estimated to have paid approximately \$1.29 billion in wages (including owners) in 2023-24, representing 38% of turnover (up from 35% in 2022-23).

Opportunities and constraints to growth

Almost all respondents perceive opportunities for industry growth over the next 5 years, most commonly driven by increased demand in landscape, consumer and environmental markets.

However, input costs and labour are currently major growth restraints, affecting 6 in 10 and 4 in 10 businesses respectively. Notably, labour constraints are currently restricting growth among two thirds of respondent businesses with turnover exceeding \$4 million.

Current and future challenges

Severe weather events have *majorly* impacted a higher proportion of businesses than 12 months ago and the impact of securing insurance policies (costs, exclusion of events etc.) is becoming increasingly widespread.

Controlling and preventing biosecurity risks continue to have at least a *minor* impact on two thirds of businesses. However, it is significantly more widespread in Queensland, where fire ants are likely contributing to one third of the state's nurseries being *majorly* impacted by controlling or preventing biosecurity threats.

Conclusions and recommendations:



Production nurseries continue to contribute substantial economic value (3.38 billion in 2023-24 or \$2.65 billion excluding double counting of plants).



Year on year sales declined by approximately 4% in 2023-24 and combined with rising operating costs has resulted in significantly less widespread industry profitability, confidence and capital investment



Despite currently facing challenges, many production nurseries, particularly larger operators, anticipate growth over the next 5 years and a large group of landscapers and independent retail nurseries expect expansion over this period, presenting opportunities to grow. The industry may need continued support to realise this growth potential, particularly while input costs and skilled labour shortages are restraining growth for many operators.



While the number of industry businesses is contracting, it is most prevalent among small operators and there remains likelihood that larger businesses will absorb much of this market share, limiting the impact on overall production value.



To maintain high survey participation and commitment to providing a substantial amount of data to the survey, ongoing communication about the benefits of the data is crucial.



Main report

1. Background and methodology

Background

The 2023–24 Production Nursery Data Capture Report is the fourth annual survey under the NY21000 Project umbrella and eighth nursery statistics survey funded by Hort Innovation.

The survey gathers timely point-in-time and tracking metrics to support industry decision-making, advocacy, resource prioritization, 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 2024 survey largely collects 2023–24 financial year data, including the following metrics:

- the value of production nursery sales by supply chain and plant category
- the value of sales to 'big box' retailers and Bunnings stores specifically
- perceived opportunities and constraints to industry growth
- operational and input costs
- current and expected business challenges
- current and future impact of industry challenges
- current future industry sentiment and operational phase
- employment numbers and wage expenditures
- profitability and investment figures
- indoor and outdoor production area

Readers of this report version should note that some metrics have been redacted.

Data collection methodology

To maximise participation rates and ensure data can be reliably compared to past years, the 2023–24 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), snapshot of the industry (2022–23 financial year) and full questionnaire (appendix 2) to clarify data requirements and DTER's data and confidentiality practices.

Stage 3:

- Interviews 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). 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.

Initial contact, appointment setting and interviewing commenced on Tuesday 8th October 2024 and concluded on Tuesday 3rd of November 2024.

In total, 297 interviews were completed, slightly less than in 2023 (303), but a much larger sample than in 2022 (266) and 2021 (269).

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

In total, 171 interviews were completed via telephone, 56 received via email and 69 entered via the online platform.

Data weighting and number of greenlife businesses

Due to the comprehensive number of calls made for the project, it was 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 that 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.

It is important to note that the extrapolation of data makes the assumption that the sample for the project represents 'the universe' of greenlife production organisations.

Where survey data is extrapolated to represent the entire industry, this report focuses on providing robust national data, while state estimates are provided in the Hort Stats Handbook and Acil Allen's Economic Contribution Analysis.

	national	nsw/act	vic	qld	sa	wa	tas	nt
Number of greenlife production businesses estimated	1589	495	418	400	94	124	48	10
Number of interviews conducted	297	76	102	61	19	27	8	4

Confidence limits

sample base	margin for error (where 50% of respondents concur)
297	±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

Due to very small sample sizes in South Australia, Western Australia, Tasmania, Northern Territory and Australian Capital Territory, as well as the industry's diversity, extrapolated data is presented nationally and by business size rather than by State and Territory.

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 2023-24 financial year, comparisons made to 2023 data, will be based on the 2022-23 financial year for most variables.

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

Enterprise phase	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
Business size (turnover)	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
Perception of industry	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

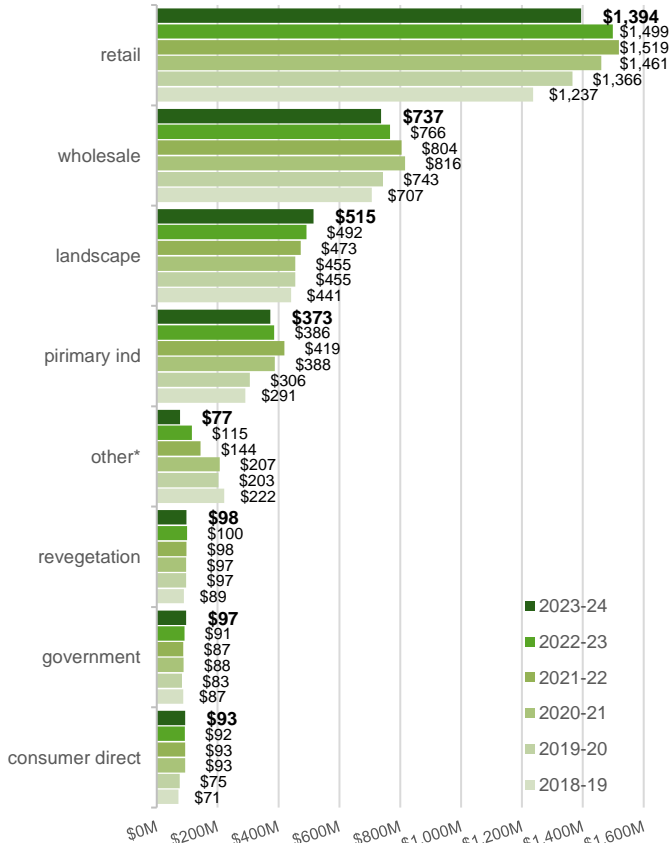
3.1 Value of plants sold by supply chain

Questions asked: Q7. In the 2023-24 financial year what was the total value (including resale) excluding GST of plants sold to ...

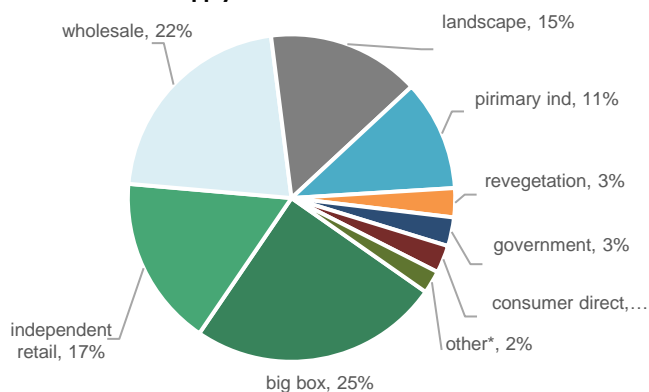
total greenlife sales (\$'000,000) (base: able to answer)



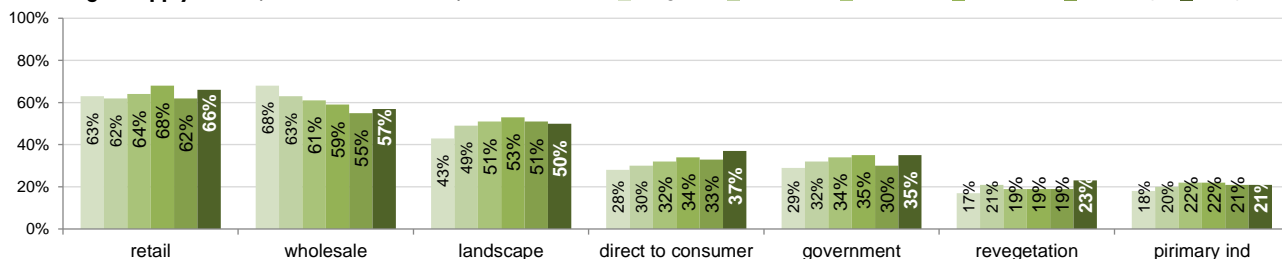
value of plant sales by supply chain (\$'000,000)



% market share x supply chain



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



Key findings

- Survey results suggest that the total value of production nursery sales declined for the second consecutive year, with 2023-24 sales estimated to be approximately \$3.39 billion, a decrease of between 4% and 5% from 2022-23 (\$3.54 billion).
- Excluding sales to other wholesale nurseries to prevent 'double counting' of plant sales, the total value of production in 2023-24 is estimated at \$2.65 billion, down slightly from \$2.78 billion in 2022-23.
- Notably, the value of plants sold to landscapers, builders and developers continues to increase, whereas sales to retail and wholesale nurseries have trended downwards in the past 2 financial years.
- In this year's survey, sales to revegetation and forestry were captured as separate categories. Results indicate 21% of respondents sold to revegetation supply chain in 2023-24 and 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.
- Readers should note 'other' mentions include totals for those people unable to provide breakdowns by category.

Implications

Extrapolated survey data suggests that while the industry's production value remains substantial, it declined 4% to 5% year on year in 2023-24. However, opportunities for growth remain, including among landscapers and independent retail nurseries, with many of this channel planning to purchase more plants and/or expand in the coming years.

While values cannot be attributed to revegetation and forestry supply chains, it is likely the former is valued significantly higher than the latter.

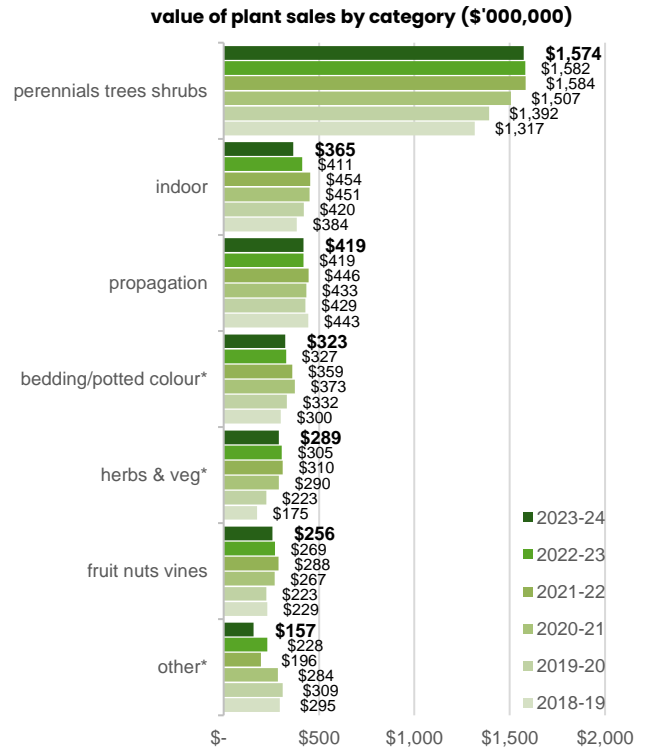
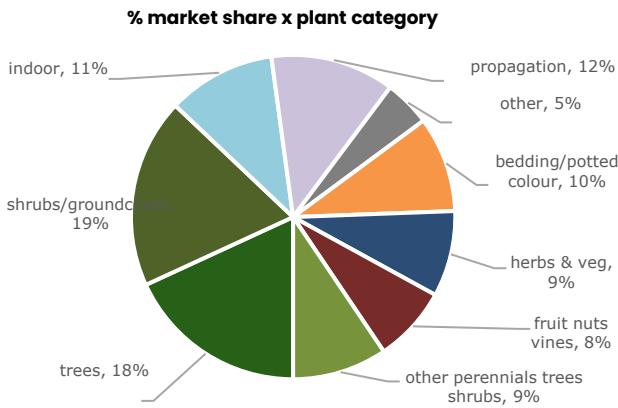
supply chain category for plants sold (estimated)	2023 survey (2022-2023 year)	2024 survey (2023-2024 year)
Production nurseries:		
% selling to sector	55%	57%
Total value of plants	\$766,249,743	\$736,478,789
Retail nurseries:		
% selling to sector	62%	66%
Total value of plants	\$1,499,384,880	\$1,393,570,447
Total: Revegetation, including forestry:		
% selling to sector	19%	23%
Total value of plants	\$100,449,799	\$97,920,507
Revegetation:		
% selling to sector	NA	21%
Forestry:		
% selling to sector	NA	10%
Local, State and Federal Government Departments:		
% selling to sector	30%	35%
Total value of plants	\$91,493,937	\$97,284,717
Landscapers, developers and builders:		
% selling to sector	51%	50%
Total value of plants	\$491,538,597	\$515,412,362
Primary industry:		
% selling to sector	21%	21%
Total value of plants	\$385,890,465	\$372,967,504
Direct to consumer:		
% selling to sector	33%	37%
Total value of plants	\$92,185,538	\$93,199,014
Other (includes those unable to breakdown by category) :*		
% selling to sector	5%	5%
Total value of plants	\$114,529,366	\$77,244,649
Total value of plants sold (including those sold to wholesalers):	\$3,541,722,325	\$3,384,077,989
Total value of plants sold (excluding double counting):	\$2,775,472,582	\$2,647,599,200

Due to small sample sizes by category, only national data is provided
 NOTE: Data is for the 2023-24 year and not necessarily representative of sales in every year.

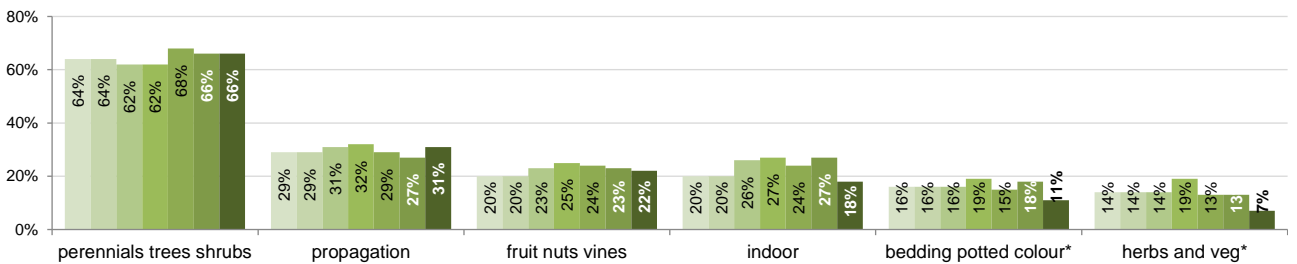
*Significance testing not conducted, small sample size

3.2 Value of plants sold by plant category

Questions asked: Q8. During the 2023-24 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

- On average, production nurseries sell plants from between 1 and 2 different categories.
- Sales of perennials, trees and shrubs remained consistent year on year, continuing to be the largest plant sales category, accounting for 47% of all sales (up slightly from 45% in 2022-23 and 44% in 2021-22).
- When broken down, sales to this category are estimated to be distributed relatively evenly between trees and shrubs/groundcovers, with approximately half of all businesses selling plants in each category.
- Consistent with past years, plant sales for each of the remaining categories represent approximately 10% of total sales.
- Many businesses continue to face challenges categorising the number of plants sold, particularly when products are sold in trays or similar formats. As a result, the number of plant units sold is indicative and should be viewed with caution.
- As per section 3.1, 'other' mentions in this section include totals from respondents unable to provide breakdowns by category.

Implications

Sales of perennials, trees and shrubs represent a growing proportion of the total value of plants sold, while the remaining categories each continue to represent approximately 10% of sales value.

client category for plants sold (estimated)**	2023 survey (2022-2023 year)	2024 survey (2023-2024 year)
Propagation plants:		
% selling propagation plants	27%	31%
Total number of plants	556,036,854	498,292,069
Total value of plants	\$419,180,618	\$419,116,407
Herbs and vegetables:†		
% selling herbs and vegetables	13%	7%
Total number of plants	998,585,344	976,470,659
Total value of plants	\$304,958,173	\$289,996,349
Fruit trees, nut trees, vines:		
% selling fruit trees, nut trees, vines	23%	22%
Total number of plants	29,491,242	25,987,180
Total value of plants	\$269,311,874.2	\$256,551,091
Bedding and potted colour:†		
% selling bedding, potted colour	18%	11%
Total number of plants	165,312,655	160,353,275
Total value of plants	\$327,219,382.37	323,047,515
Indoor plants:		
% selling indoor plants	27%	18%
Total number of plants	79,836,276	70,512,215
Total value of plants	\$410,670,762	\$365,019,633
Total: Perennials, trees and shrubs:		
% selling perennials, trees, shrubs	66%	66%
Total number of plants	328,432,164	309,106,670
Total value of plants	\$1,582,239,888	\$1,574,394,160
Trees:		
% selling trees	47%	50%
Total number of plants	95,793,717	99,975,596
Total value of plants	\$588,761,159	\$613,868,767
Shrubs and groundcovers:		
% selling shrubs and groundcovers	52%	50%
Total number of plants	167,860,069	151,212,746
Total value of plants	\$660,126,041	\$640,752,411
Other perennials, trees and shrubs (those unable to split trees and groundcovers/shrubs):		
Total number of plants	\$64,778,377	57,918,328
Total value of plants	\$333,352,688	319,772,981
Other (includes those unable to breakdown by category):†		
% selling other	9%	11%
Total number of plants	106,071,366	23,362,426
Total value of plants	\$228,141,627	\$156,720,804
Total plants sold (including those sold to wholesalers):		
Total number of plants	2,263,765,900	2,064,084,494
Total value of plants	\$3,541,722,325	\$3,384,845,960

Due to small sample sizes by category, only national data is provided *Significance testing not conducted, small sample size
NOTE: Data is for the 2023-24 year and not necessarily representative of sales in every year; ↓ significant decrease since 2023

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

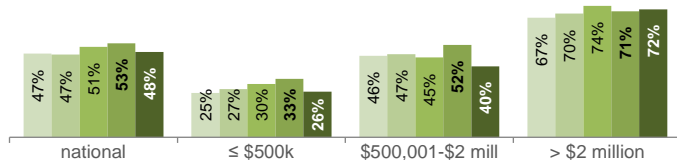
3.3 Sales to 'big box' retailers

Questions asked: Q13. In 2023-24, did you sell plants to 'big box' retailers such as Bunnings, Mitre 10, Coles, Aldi, Woolworths or other large retailers? Q14. What percentage of your sales to retail nurseries went to these 'big box' retailers Q14a And what percentage by volume of your sales to retail nurseries are to Bunnings exclusively? Q14b. And what percentage by value of your sales to retail nurseries are to Bunnings?

% of businesses selling to 'big box' retailers

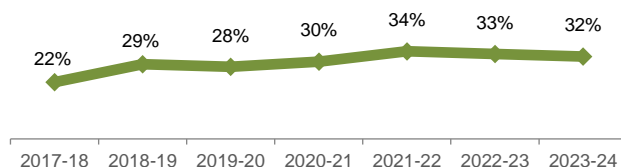
(base: respondents selling to retail)

■ 2019-20 ■ 2020-21 ■ 2021-22 ■ 2022-23 ■ 2023-24



% of all businesses selling to 'big box' retailers

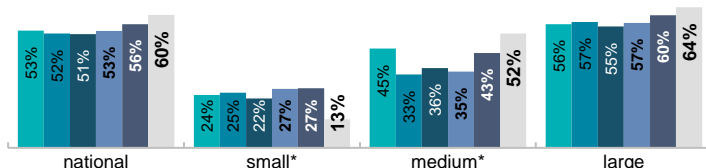
(base: all respondents)



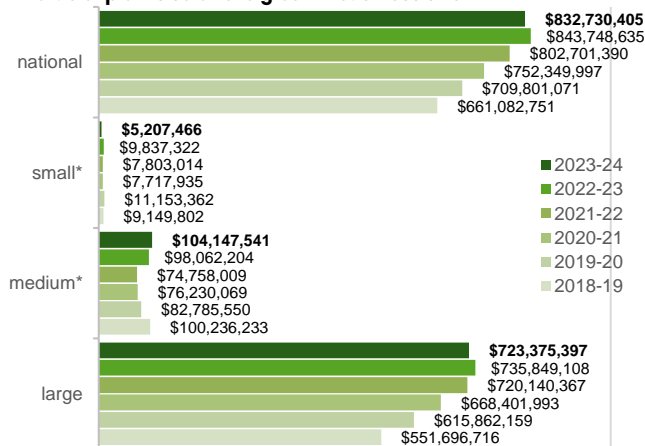
% of all retail sales to 'big box' retailers

(base: respondents selling to retail)

■ 2018-19 ■ 2019-20 ■ 2020-21 ■ 2021-22 ■ 2022-23 ■ 2023-24



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



Key findings

- In line with 2022-23 results, approximately one third (32%) of all respondents sold plants to 'big box' retailers in 2023-24.
- This represents 48% of respondent businesses selling plants to the retail channel, a slight decrease from 53% in 2022-23. Notably, this varies significantly by business size (from 72% of large to 26% of small operators).
- The total value of plant sales sold to 'big box' retailers continues to trend upwards, representing an estimated 60% of sales to the retail supply chain in 2023-24 (estimated to be valued at approximately \$830 million in 2023-24 – similar to the prior financial year; \$844 million).
- This year's survey explored the value and number of plants sold directly to Bunnings. In total, 78% of respondents selling to 'big box' retailers sell plants to Bunnings.
- Results suggest that 55% of the total value of retail sales were exclusive to this retailer, equivalent to approximately 90% of sales to 'big box' retail. However, findings are indicative only due to relatively small sample sizes and almost 20% of large businesses declining to answer or unable to provide figures.
- While accurately capturing the total volume of plants sold directly to Bunnings is challenging due to small samples and difficulty answering, it is likely the proportion is in line with the total value (55%).

Implications

Survey results suggest that sales to 'big box' retailers have remained steady over the past 2 financial years. This consistency suggests that the overall decline in sales to the retail channel may be attributed to decreased sales to independent retailers.

As may be expected, production nursery sales to Bunnings represents the bulk of sales to the 'big box' channel

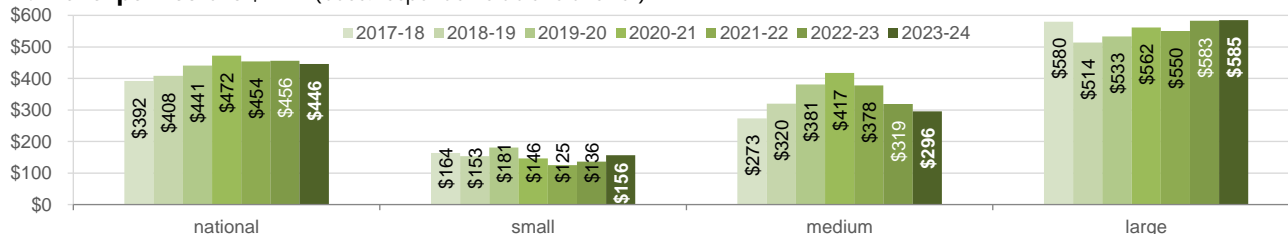
plants sold to 'big box' retailers 2023-24 (estimated)	% mentioning (base: all respondents selling to retail/able to answer)				
		turnover			
	national	≤ \$500k*	\$500k to \$2 mil*	> \$2 million	don't know t/o*
% selling to 'big box' retailers (base: respondents selling to retail chain n= 198)	48%	26%	40%	72%	-
% of retail sales to 'big box' retailers (base: n=90)	60%	13%	46%	64%	-
Total value of plants sold (base: n=90)	\$832,730,405	\$5,207,466	\$104,147,541	\$723,375,397	-
% selling to Bunnings (base: those selling to 'big box' retailers n=90)	78%	45%	81%	80%	-
% of retail sales to Bunnings specifically (base: n=65)	55%	8%	44%	59%	-

NOTE: Data is for the 2023-24 year and not necessarily representative of sales in every year *Caution, sub sample smaller than n=30

4. Turnover per hectare 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 production nurseries operate across approximately 7,600 hectares and generate an average of \$446,000 per hectare. Each result is slightly, but not statistically significantly less than in 2022-23.
- Consistent with past results, turnover per hectare varies significantly by business size, from \$585,000 among large to \$156,000 among small counterparts.
- Additionally, turnover per hectare is trending downwards among businesses turning over between \$500,000 and \$2 million.
- Approximately 8 in 10 (78%) of respondent businesses have indoor production area which on par with 2023, represents 16% of total production area.

Implications

Production nurseries continue to generate a substantial amount of turnover per hectare of productive land, but the decline among medium sized businesses is of some concern.

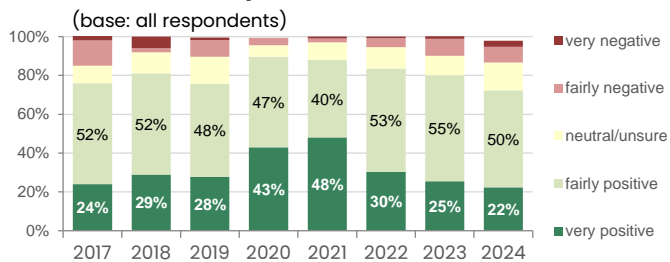
production area (hectares) (estimated)	% mentioning (base: respondents able to provide data) turnover				
	national	≤ \$500k	\$500,001 to \$2 million	> \$2 million	don't know t/o*
Estimated turnover per hectare (outdoor + indoor)	\$446,371	\$155,709	\$296,310	\$584,417	-
Outdoor area (approximate)					
Average ha per farm	4.1	1.4	↑ 3.7	8.3	-
Median ha per farm	1.0	0.4	1.0	4.0	-
Estimated total outdoor area (ha)	6,397	785	1,890	3,720	-
Indoor area (approximate)					
% of farms with indoor area	78%	78%	78%	81%	39%
Average ha per farm with indoor area	0.8	0.3	0.7	1.5	-
Median ha per farm with indoor area	0.2	0.0	0.3	0.8	-
Estimated total indoor area (ha)	1,185	152	345	687	-

↑ significant increase since 2023; ↓ significant decrease since 2023 *Caution sub sample smaller than n=30

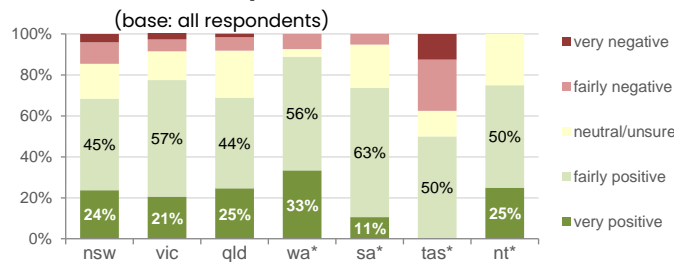
5. Industry confidence

Questions asked: Q21. Overall, how do you feel about the future of the nursery and garden industry?

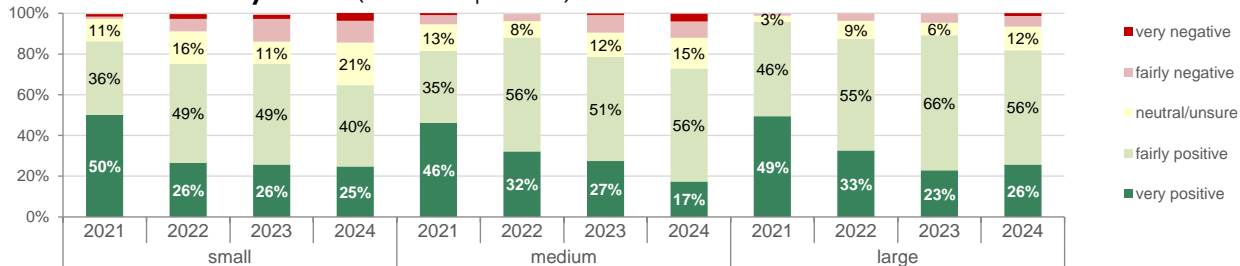
confidence in industry's future



confidence in industry's future x state



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



Key findings

- Overall, industry positivity remains widespread, but consistent with profitability has trended downward since 2020 and decreased significantly over the past 12 months (72%, down from 80%).
- While this trend is reflected across each business size, the majority of respondents from large (82%) and medium (73%) sized businesses remain confident towards the industry's future.
- Additionally, confidence varies among the following segments:
 - state (89% in WA to 68% in NSW and 50% in TAS)
 - business phase (87% expanding to 51% contracting)
 - profitability (80% profitable in 2023-24 to 59% not)

Implications

Although confidence towards the industry's future remains reasonably widespread, particularly among large businesses, it is showing a downwards trend in correlation with profitability.

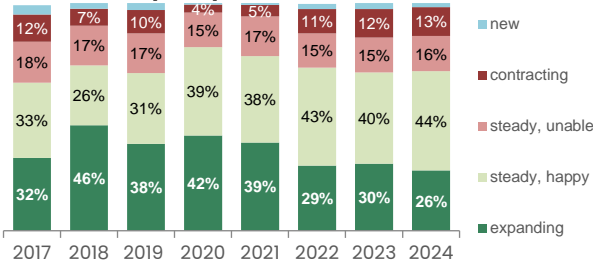
confidence	% mentioning (base: all respondents)				
	national (n=297)	turnover			
		≤ \$500k (n=108)	\$500,001 to \$2 million (n=97)	> \$2 million (n=89)	don't know t/o* (n=3)
Very positive	22%	25%	17%	26%	0%
Fairly positive	50%	40%	56%	56%	44%
Neutral	14%	16%	14%	12%	56%
Fairly negative	8%	11%	8%	5%	0%
Very negative	3%	4%	4%	1%	0%
Can't say	2%	5%	1%	0%	0%
Total: positive	↓ 72%	65%	73%	82%	44%
Total: negative	11%	15%	12%	7%	0%

 significant increase since 2023;
  significant decrease since 2023
 *Caution sub sample smaller than n=30. Errors due to rounding

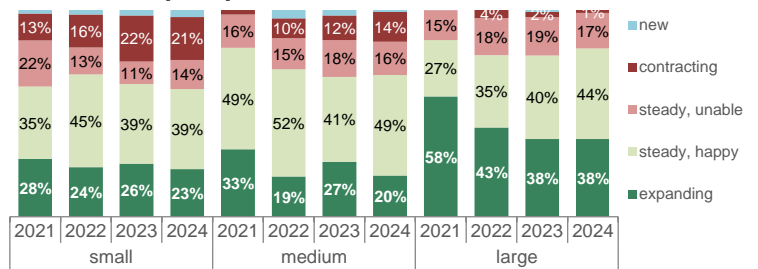
6. Current business phase and future intentions

Questions asked: Q19. Which of the following best describes your nursery business over the past few years?
Q20. At this point in time, what is the intention for the business over the next 5 years?

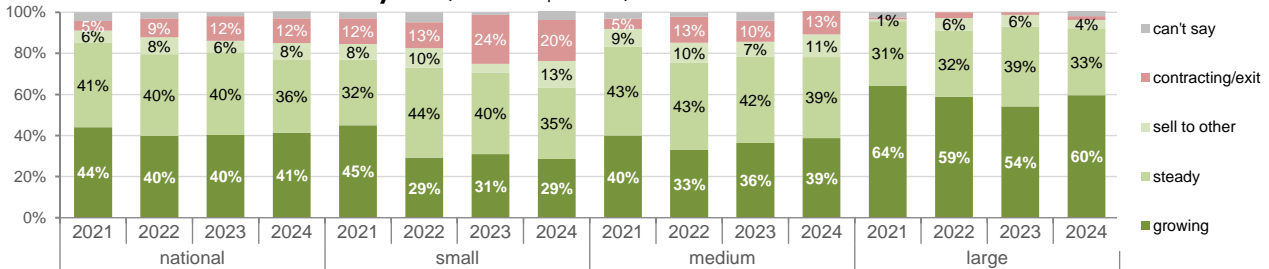
current enterprise phase (base: all respondents)



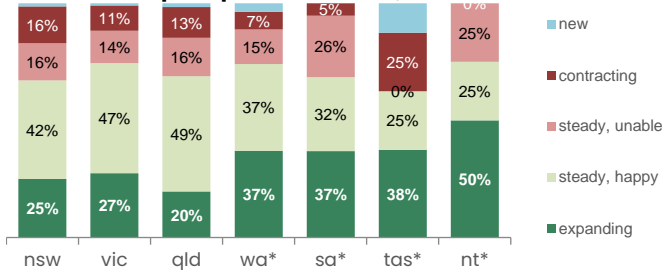
current enterprise phase (base: all respondents)



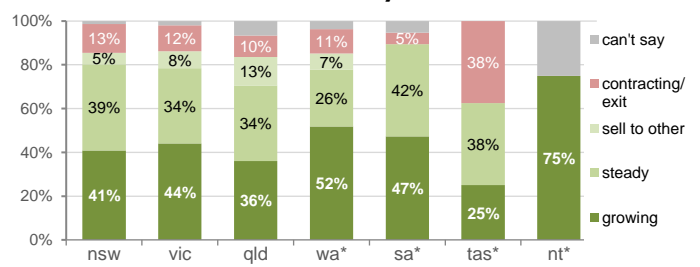
business intentions for the next 5 years (base: all respondents)



current enterprise phase (base: all respondents)



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



Key findings

- The proportion of business expanding has trended downwards since 2020 to the lowest result since the survey first collected this data in 2017 (26% in 2024).
- However, expansion remains significantly more prevalent among larger businesses, varying from 48% of those with turnover exceeding \$4 million to 22% turning over less than \$2 million.
- Conversely, the proportion of businesses contracting or winding down has trended upwards since 2020 (13% in 2024), but remains almost exclusively among businesses turning over less than \$2 million.
- Over the next 5 years, 41% of respondents plan to grow their business, but growth remains significantly more likely among larger businesses (64% of those with turnover greater than \$4 million to 29% with turnover less than \$500,000).
- On par with 12 months ago, 12% of respondents expect to contract or exit the industry, but this expectation varies from 1 in 5 (20%) small businesses to 1% of large operators.

Implications

Over the past 3 years, some businesses have transitioned from expansion to a steady or contracting phase of operation. However, substantial growth potential remains as many businesses plan to expand in the coming years, particularly larger operators, highlighting the importance of continuing to support expansion opportunities.

current business stage	% mentioning (base: all respondents)				
	turnover				
	national (n=297)	≤ \$500k (n=108)	\$500,001 to \$2 million (n=97)	> \$2 million (n=89)	don't know t/o* (n=3)
Expanding	26%	23%	20%	38%	28%
Steady, where want it to be	44%	39%	49%	44%	44%
Steady, unable to expand	16%	14%	16%	17%	0%
Contracting/winding down	13%	21%	14%	1%	0%
New business	2%	3%	1%	0%	28%

future intentions for business	% mentioning (base: all respondents)				
	turnover				
	national (n=297)	≤ \$500k (n=108)	\$500,001 to \$2 million (n=97)	> \$2 million (n=89)	don't know t/o* (n=3)
Growing business	41%	29%	39%	60%	56%
Remaining steady	36%	35%	39%	33%	44%
Contracting/winding down	4%	8%	4%	1%	0%
Sell as business to other person/company	8%	10%	9%	3%	0%
Sell land to developer	2%	3%	2%	1%	0%
Close business	6%	9%	7%	0%	0%
Can't say	3%	7%	↓ 0%	3%	0%

↓ significant decrease since 2023

*Caution sub sample smaller than n=30.

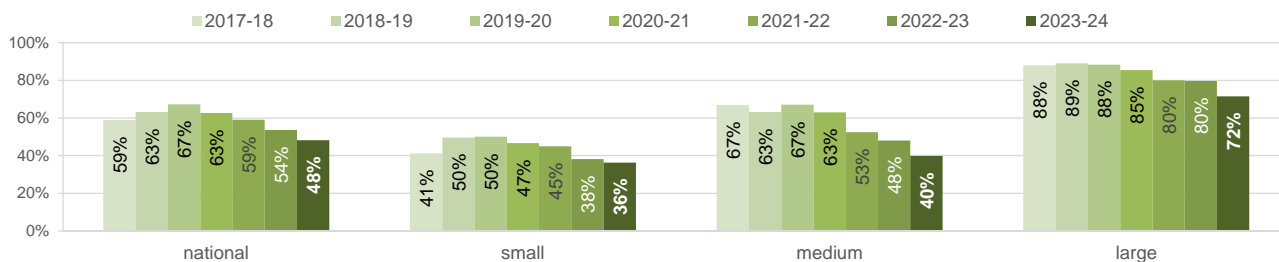
7. Business investment

Question asked:

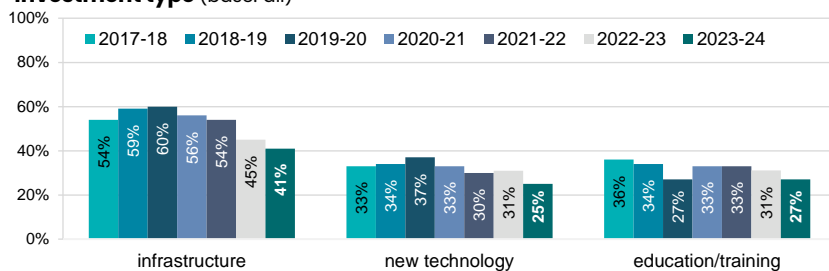
Q27. During the 2023-24 financial year, did you invest in either infrastructure or new technology or training and education for the business?

Q28. If yes: Approximately how much did you invest in infrastructure? Q29. If yes: Approximately how much did you invest in new technology?

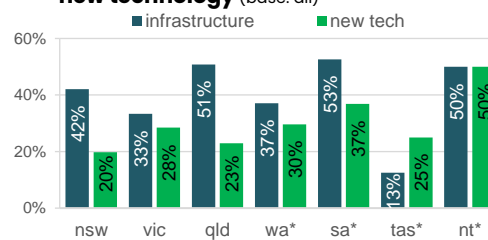
% investing in own business infrastructure or new technology (base: all)



Investment type (base: all)



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



Key findings

- Since 2019-20, the proportion of respondent businesses investing in either new business infrastructure or technology has trended downwards to 48%, the lowest result since the survey commenced in 2017-18.
- While this trend is reflected across all business sizes, a large proportion of businesses (72%) with turnover exceeding \$2 million dollars invested in either infrastructure or technology during 2023-24.
- Consistent with past survey waves, large businesses remain significantly more likely to be making capital investments than small (36%) and medium (40%) counterparts.
- As expected, those making an operating profit in 2023-24 were significantly more likely to have invested in new infrastructure or technology than those not profitable (53% and 38% respectively).
- Almost 3 in 10 (27%) businesses invested in education and training in 2023-24, but this varies from half (49%) with turnover exceeding \$4 million to 12% with turnover less than \$500,000.

Implications

Aligned with trends in profitability, business expansion and industry confidence, investment in infrastructure and new technology is declining overall, but remains widespread among larger businesses.

business investment	% mentioning (base: all respondents able to answer)				
	national	turnover			
		≤ \$500k*	\$500,001-\$2 mil*	> \$2 million	don't know t/o*
% making business investment in infrastructure or new technology	48%	36%	40%	72%	48%
% investing in infrastructure	41%	32%	33%	61%	41%
Average amount invested in infrastructure (base: those investing)	\$184,019	\$32,429	\$111,626	\$338,641	-
Total invested in infrastructure (extrapolated)	↓ \$104,805,880	\$5,856,549	\$19,454,729	↓ \$79,494,602	-
% investing in new technology	25%	10%	21%	48%	25%
Average amount invested in new technology (base: those investing)	↓ \$64,942	\$7,778	\$47,987	↓ \$85,543	-
Total invested in new technology (extrapolated)	↓ \$25,846,926	\$396,709	\$5,408,788	↓ \$20,041,429	-
% investing in education and training	27%	↓ 12%	32%	41%	27%

↑ significant increase since 2022-23; ↓ significant decrease since 2022-23

*Caution sub sample smaller than n=30.

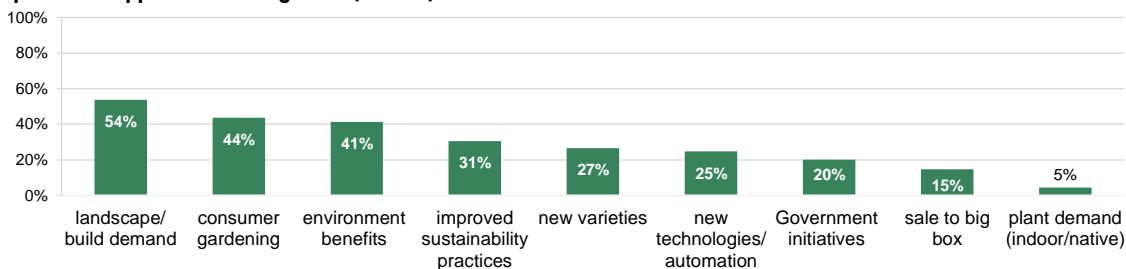
8. Perceived opportunities and constraints to growth (new in 2024)

Question asked:

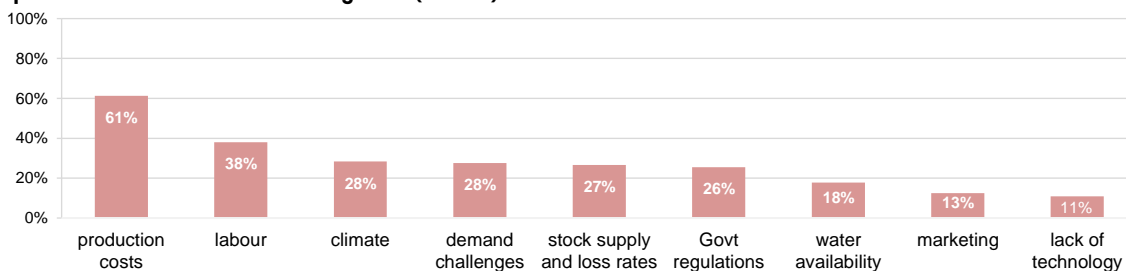
Q22. What do you see as the biggest opportunities for growth in the production nursery industry over the next 5 years?

Q23. And which of the following, if any, are key constraints to growing your business?

perceived opportunities for growth (base: all)



perceived constraints to business growth (base: all)



Key findings

- Almost all respondents perceived opportunities for industry growth over the next 5 years and on average, between 2 and 3 were nominated.
- The most commonly cited opportunities focus on increasing demand via landscape, consumer and environmental channels.
- While 15% of businesses nationally perceived opportunities with 'big box' retailers, this perception varied significantly by business size, from 24% of large to a much lower 8% of small operators.
- Currently, input and production costs are the most common constraint to business growth, nominated by 61% of respondents nationally. These concerns, however, were more pronounced among large (71%) businesses than small (50%) counterparts.
- Similarly, labour issues are perceived a constraint to growth by 38% of all respondents, but this increases significantly to 65% among business with turnover exceeding \$4 million.
- Notably, managing stock supply and loss rates impacting growth for 27% of businesses, including one third of those turning over greater than \$2 million.

Implications

Opportunities for industry growth are widespread and likely contributing to the large proportion of businesses anticipating growth over the next 5 years. However, input costs and labour issues (for larger businesses) may constrain some growth.

An arguably large proportion of respondents believe their businesses growth is constrained by challenges managing stock supply and may be an opportunity for the industry to improve skills in this area.

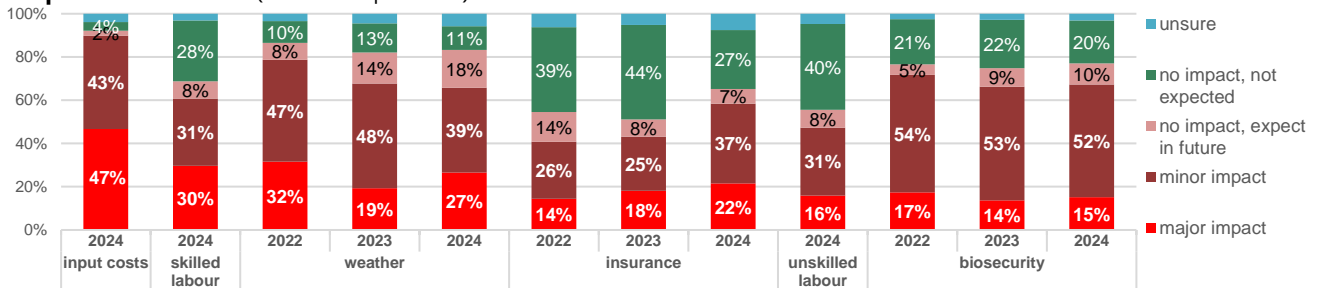
perceived opportunities	% mentioning (base: all respondents)				
	national (n=297)	turnover			
		≤ \$500k (n=108)	\$500,001 to \$2 million (n=97)	> \$2 million (n=89)	don't know t/o* (n=3)
Increasing landscape/building demand	54%	48%	57%	57%	56%
Growing consumer interest in home gardening	44%	44%	43%	44%	44%
Increasing demand due to environmental benefits - carbon sequestration etc.	41%	52%	32%	39%	0%
Improved sustainability practices	31%	37%	30%	24%	0%
Developing new plant varieties	27%	28%	23%	29%	0%
Adoption of new technologies or automation	25%	17%	29%	31%	0%
Government initiatives or subsidies	20%	23%	22%	16%	0%
Partnerships with large retailers/big box stores	15%	8%	13%	24%	28%
Growing demand (population/native/indoor etc.)	5%	7%	4%	2%	0%

perceived constraints to growth	% mentioning (base: all respondents)				
	national (n=297)	turnover			
		≤ \$500k (n=108)	\$500,001 to \$2 million (n=97)	> \$2 million (n=89)	don't know t/o* (n=3)
Cost of production/input costs	61%	50%	65%	71%	56%
Labour shortages/issues	38%	23%	42%	53%	0%
Climate	28%	33%	26%	27%	0%
Plant demand/competition/ finding markets	28%	29%	31%	23%	0%
Managing stock, supply and loss rates	27%	27%	28%	26%	0%
Government/environmental regulations	26%	22%	26%	30%	0%
Water availability	18%	20%	14%	20%	0%
Nursery industry marketing	13%	13%	13%	11%	0%
Lack of technology	11%	10%	9%	14%	0%

9. Current and expected future impact of risk factors

Question asked: Q18. For the issues listed below, how much impact are they currently having on your business?

impact of risk factors (base: all respondents)







Key findings



- Consistent with results from the prior section, input costs are the most commonly nominated challenge impacting on production business (90% rating costs as having *minor* or *major* impact).
- Compared to 12 months ago, severe weather is having a *major* impact on a significantly greater proportion of respondent businesses (27%, was 19%).
- Skilled and unskilled labour shortages are currently impacting 61% and 47% of businesses respectively. However, this increases to 86% and 72% among business turning over greater than \$4 million.
- Since 2022, securing insurance policies, costs and exclusion of events has impacted a growing proportion of businesses and the proportion affected has increased significantly over the past year (59%, up from 44%).
- Controlling and preventing biosecurity is currently impacting two thirds (67%) of business nationally, but increases to 8 in 10 in Queensland, where 33% of business report major impacts. The latter result is likely influenced by the significant impact of fire ants.

Implications

Production nurseries are currently facing a variety of challenges, most commonly rising input costs, but insurance and severe weather are impacting more businesses than 12 months ago and challenges controlling biosecurity threats is a growing issue in Queensland.

Skilled labour shortages continue to impact a very large proportion of businesses and justifies continued focus and support in this area.

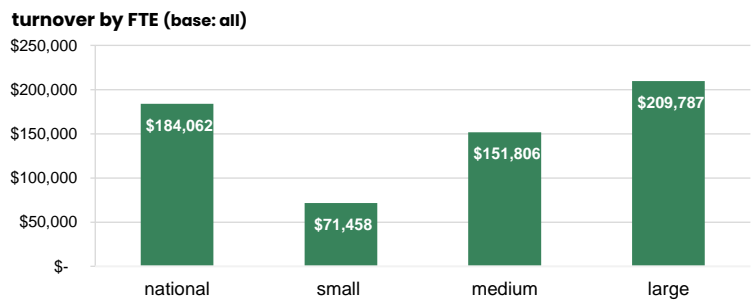
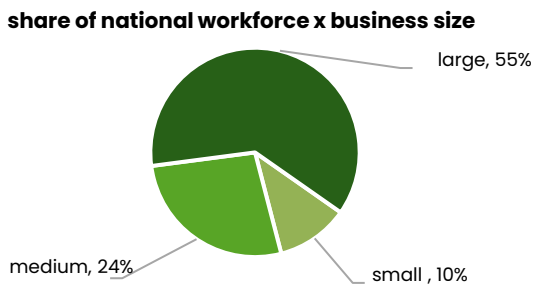
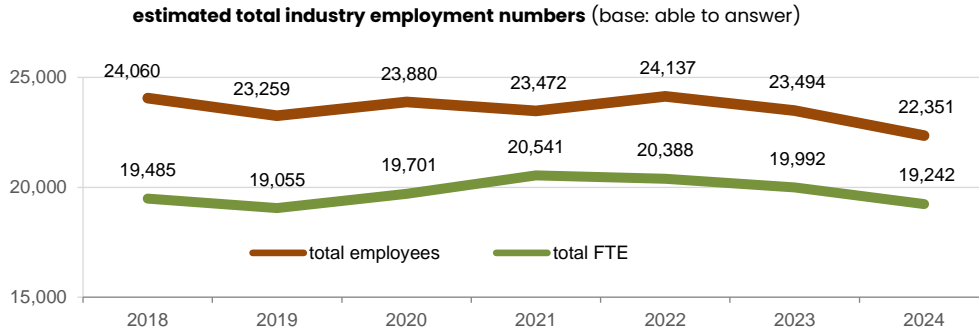
risk factor	current and future impact (% mentioning - base: all respondents; n = 297)				
	major impact	minor impact	no impact, but expect in future	no impact, not expect in future	unsure/can't say
Cost of production – input costs (fertiliser, media, transport, electricity, water etc.)	47%	43%	2%	4%	4%
Skilled labour shortages	30%	31%	8%	28%	3%
Severe weather – such as storms, hail, wind, rain & flood	 27%	 39%	18%	11%	6%
Insurance – securing policies, exclusion of events and cost	22%	 37%	7%	 27%	7%
Unskilled labour shortages	16%	31%	8%	40%	5%
Biosecurity – controlling/ preventing pests & diseases	15%	52%	10%	20%	3%

 significant increase since 2023;  significant decrease since 2023 *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?



Key findings

- Extrapolated survey data suggests the total number of staff employed by production nurseries has decreased significantly over the past year (approximately 22,500 including owners, down from 23,500).
- Similarly, the total FTE has decreased from almost 20,000 to approximately 19,200.
- Nationally, turnover per FTE has not changed significantly since 2022-23 (approximately \$184,000, was \$177,000).
- However, this result has decreased significantly among small operators and remains significantly higher among medium and large businesses.

Implications

Extrapolated survey data suggests that employment numbers and FTE have declined over the past year.

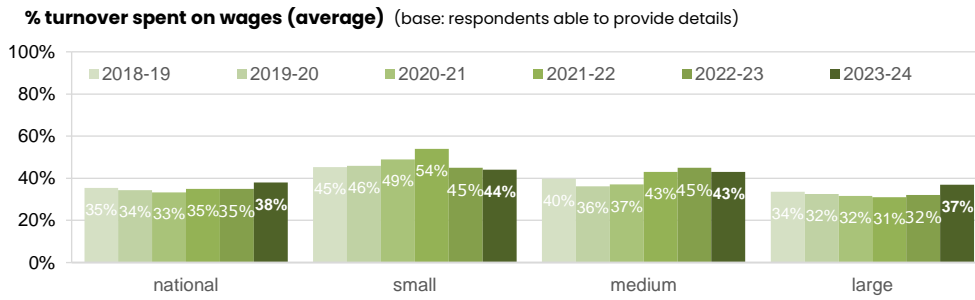
total people employed by production greenlife nurseries (estimated)	% mentioning (base: all respondents able to answer)				
	national	≤ \$500k	\$500,001 to \$2 mil	> \$2 million	don't know t/o*
Total people employed	↓ 22,351	2,286	↓ 5,293	14,700	72
Full time equivalent	19,242	1,738	4,226	13,232	46
Turnover per FTE	\$184,062	↓ \$71,458	\$151,806	\$209,787	-

↑ significant increase since 2023; ↓ significant decrease since 2023 *Caution, sub sample smaller than n=30

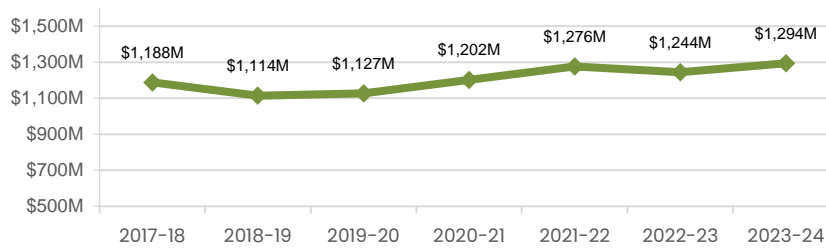
10.2 Wages paid

Question asked:

Q5. What was the total cost of wages for the business in the 2023-24 financial year, including your own?



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



Key findings

- Extrapolated survey data suggests that almost \$1.294 billion dollars in wages (including business owners) was paid in 2023-24, up slightly from \$1.244 billion in the prior financial year.
- Similarly, the proportion of turnover represented by wage costs has increased slightly from 35% in 2022-23 to 38% in 2023-24 – the highest result since 2018-19.
- The average wage (including business owners) of respondent businesses in 2023-24 is estimated to be approximately \$67,000.
- 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.

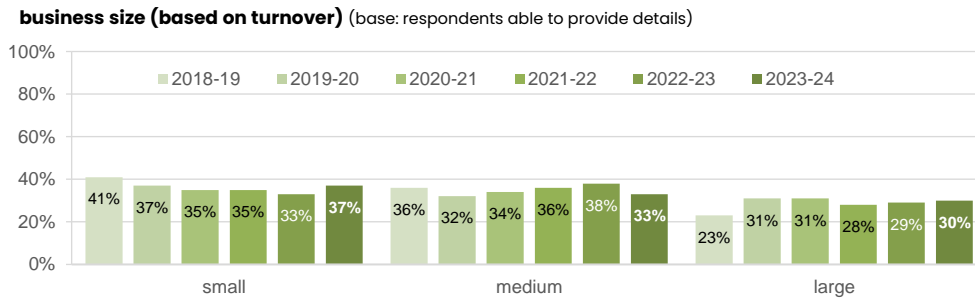
Implications

Data suggests that wage costs represented a higher proportion of overall turnover in 2023-24 than in past years.

cost of wages in 2023-24 (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	\$1,294,359,303	\$64,772,329	\$282,130,281	\$942,131,737	\$5,324,957
Average wage based on FTE (including owners)	\$67,267	\$37,272	\$66,760	\$71,198	-
% of turnover spent on wages (average, including owners)	38%	44%	43%	37%	-

*Caution, sub sample smaller than n=30.

11. Organisation size (based on survey sample)



Key findings

- Consistent with past survey waves, the survey sample provides a spread of businesses sizes.
- While not quite statistically significantly, in 2024 a slightly higher proportion of small businesses

participated and slightly smaller proportion of medium sized compared to 2023.

Implications

The slight year on year variation may be due either to sampling variation or reduction in turnover among businesses previously turning over between \$500,000 to \$2 million shifting them into the ‘small’ segment.

business turnover	% mentioning (base: respondents able to provide data)	
	2023 survey (2022-2023 year)	2024 survey (2023-2024 year)
Less than \$500,000	33%	37%
\$500,000 to \$1,000,000	18%	19%
\$1,000,001 to \$1,500,000	12%	9%
\$1,500,001 to \$2,000,000	8%	7%
\$2,000,001 to \$2,500,000	6%	5%
\$2,500,001 to \$3,000,000	4%	5%
\$3,000,001 to \$3,500,000	1%	3%
\$3,500,001 to \$4,000,000	3%	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	6%	7%
\$10 million+	5%	4%

12. Sample demographics

demographic metric	% of sample (base: all respondents)				
	national (n=297)	turnover			
		≤ \$500k (n=108)	\$500,001 to \$2 million (n=97)	> \$2 million (n=89)	don't know t/o* (n=3)
Age:					
18 to 39 years	9%	9%	5%	13%	-
40 to 59 years	49%	35%	54%	61%	-
60 and older	42%	56%	41%	26%	-
Average age	56	58	56	54	-
Average years business operated:	35	28	31	47	31
Gender:					
Male	73%	66%	75%	79%	72%
Female	27%	34%	25%	21%	28%
Respondent role:					
Owner or joint owner of the business	72%	74%	75%	66%	44%
Manager	25%	24%	20%	33%	28%
Admin/Accounts	3%	1%	5%	1%	28%

↑ significant increase since 2023;
 ↓ significant decrease since 2023
 *Caution, sub sample smaller than n=30.

Appendix 1: Confidentiality statement

8 October 2024

Nursery and Garden Industry Data & Statistics Collection

Confidentiality Statement

Thank you for your interest in providing data for the Hort Innovation project NY21000 – Nursery Industry Research and Statistics.

This project is a strategic levy investment that is part of the Hort Innovation Nursery Fund and aims to capture information to deliver accurate and timely industry statistics to support strategy development, decision making, advocacy and investment decisions.

Data for the project will be collected and stored securely by Market Metrics Data Collection, an independent, fully accredited data collection company based in Frankston, Victoria. Their web address is <http://www.marketmetrics.com.au> should you wish to read about their services. Data and information collected will only be used for the purposes of this specific project.

In accordance with Australia's strict Privacy Principles, full confidentiality is assured and once information processing has been completed, any identifying data such as your name, company and contact details (including address and postcode) will be removed from your responses to the survey. While interviewing is taking place, data held by Market Metrics will remain identifiable in case there is an anomaly in the data that requires a call back and clarification. Once Market Metrics has completed this process, de-identification will occur.

On completion of all interviewing, Down To Earth Research (DTER) and Acil Allen Consulting (responsible for producing the benchmarking data tool) will be provided with a de-identified data set so data can be aggregated and analysed. DTER will then provide an overall industry report to Hort Innovation. No one from the nursery and garden industry, Hort Innovation, industry organisations and associations, government departments, etc. will know who participated in the study nor the information and data they provided. DTER's privacy principles can be found at <https://www.dter.com.au/privacy-statement>.

Should you have any concerns whatsoever, please contact Daniel Watson from DTER (daniel@dter.com.au or 0409 775 553) or Lucy Noble from Hort Innovation (Lucy.Noble@horticulture.com.au or 02 8295 2313).

Thank you again for your assistance. The data collected for the study will assist Hort Innovation and Greenlife Industry Australia to have more meaningful discussions with government organisations in the future. Additionally, survey data is used to provide a tool that your company will be able to use for benchmarking purposes and 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 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 2023-24 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 2023-24 financial year, what was the total value (including resale) excluding GST of plants sold to ...

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

- Q8. During the 2023-24 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
Propagation plants (eg, plugs, tubestock, cuttings, tissue culture):								
Number of plants								
Value								
Herbs and vegetables (excluding seeds and bulbs):								
Number of plants								
Value								
Fruit trees, nut trees and vines (excluding seeds and bulbs):								
Number of plants								
Value								
Bedding and potted colour (eg. annuals):								
Number of plants								
Value								
Indoor plants (including patio, but excluding seeds, bulbs):								
Number of plants								
Value								
Trees:								
Number of plants								
Value								
Shrubs, groundcovers etc.								
Number of plants								
Value								
Other (including seeds, bulbs, water plants, shot seed, etc.): (please specify) DP note: allow for more than 1 other								
Number of plants								
Value								
TOTAL (computer calculate and confirm with respondent):								
Number of plants								
Value								

- Q10. Over the past 2 years, has the unit price of the plants you sell?
- Increased ----- 1 Continue
- Decreased ----- 2 Go to Q13
- Stayed the same ----- 3 Go to Q13

Q11. What was the average % increase? _____ %

- Q12. Which, if any, factors influenced your decision to increase the prices of the plants you sell
- Increased production costs ----- 1
 - Increased demand for plants ----- 2
 - Inflation ----- 3
 - Supply chain challenges ----- 4
 - Other (specify) ----- 5
 - None ----- 6

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

- Q13. In 2023-24 did you sell plants to 'big box' retailers such as Bunnings, Mitre 10, Coles, Aldi or other large retailers?
- Yes ----- 1 continue
 - No ----- 2 go to Q15

Q14. In total, what percentage of your sales to retail nurseries went to these 'big box' retailers? _____ %

Q14a. And what percentage by volume of your sales to retail nurseries are to Bunnings exclusively?

Q14b. And what percentage by value of your sales to retail nurseries are to Bunnings exclusively?

Q15. Do you know what your business's total operating costs or expenses were for the 2023-24 financial year, so this includes input costs, wages, cost of goods sold, transport costs/freight, rent etc?

Q16. And what were your total operating costs or expenses (including input costs, wages, cost of goods sold, transport costs, rent) (or estimated total operating costs if Q15 = 2) for the 2023-24 year? _____ \$

Q17. Approximately what proportion of your business turnover was taken up by operating costs or expenses for the 2023-24 financial year? _____ %

Q18. For the issues listed below, how much impact are they currently having on your business?

Biosecurity - controlling/ preventing pests & diseases
Severe weather - such as storms and natural disasters
Cost of production/input costs (fertiliser, media, transport, electricity, water etc.)
Skilled labour shortages
Unskilled labour shortages
Insurance - securing policies, exclusion of events and cost

Q19. 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

Q20. 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

Q21. 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

Q22. What do you see as the biggest opportunities for growth in the production nursery industry over the next 5 years?

Q23. And which of the following, if any, are key constraints to growing your business?

Q24. In the 2023-24 financial year, did your nursery business make an operating profit?

Q25. And do you expect to make an operating profit in the 2024-25 financial year?

Q26. Compared to the average of the past 5 years, do you expect profit levels for the 2024-25 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

- Q27. During the 2023-24 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
- Q28. Approximately how much did you invest in new infrastructure during 2023-24? _____
- Q29. Approximately how much did you invest in new technology for the business during 2023-24? _____
- Q30. May I ask your age please? _____
- Q31. And how many years has your nursery business operated for? _____
- Q32. Are you the ...
- Owner or joint owner of the business ----- 1
 - Manager ----- 2
 - Other role (specify) ----- 3
- Q33. Record gender