Nursery Industry Market data 2011-2014

Robert Prince
Nursery & Garden Industry Australia (NGIA)

Project Number: NY11004

NY11004

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Final Report
HAL Project: NY11004
Completion Date: 31 August 2014

Nursery Industry Market Data 2011-2014

Project Leader: **Robert Prince**
Nursery & Garden Industry Australia

Final Report

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This Final Report has been written by Kobie Keenan as part of the reporting requirements of Horticulture Australia Limited (HAL). This project has been funded by HAL using the Nursery industry levy and matched funds from the Australian Government.

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MEDIA SUMMARY

Following the conclusion of the industry's Market Monitor, NY11004 Industry Market Data was born out of a critical need to capture timely and accurate data for analysis on the Australian nursery and garden industry.

An Industry Reference Group spent a number of months planning and mapping the industry for data capture and determining what was the best method and frequency to ensure the collection was credible, timely and accurate.

A monthly data capture system conducted by a third party was decided. It provided free to each contributor an annual report of both their position within the market and the state of play for the Industry. It was widely promoted and awareness was high but adoption of the program by industry was not with the monthly data collection failing to launch.

In the absence of the monthly collection and still with the need to capture data, negotiations between the third party researcher GfK ensured NGIA could utilise all the mapping and a modified methodology to conduct a 'snap shot' survey of the industry.

The anonymous survey was conducted online and sufficient organisations contributed for the Industry to capture some usable information. The results of the survey were circulated to the contributors who requested the data and the industry has captured some basic but usable figures and trending data.

It remains, that across all three data collection sectors, being greenlife producers, allied trade and growing media that education is required to encourage participation in market analysis projects such as this. The benefits to a business in possession of this information are great but require further communication. Additionally, an Industry in possession of this data would be stronger and more influential.

TECHNICAL SUMMARY

Following the conclusion of the industry's Market Monitor, NY11004 Industry Market Data was born out of a critical need to capture timely and accurate data for analysis on the Australian nursery and garden industry.

An Industry Reference Group spent a number of months planning and mapping the industry for data capture and determining what was the best method and frequency for capturing data to ensure the collection was credible, timely and accurate.

A monthly data capture system conducted by a third party researcher was decided and so the process of determining the methodology began.

In formulating the methodology and having regard for past projects the following was considered by the reference group.

- How to manage industry expectations for the research.
- How to balance organisational capability to supply data with the need for the research to deliver useful information.
- Ensuring submission forms are easy to follow and use.
- Ensuring the report packages provide useful information that is easy to interpret.
- Balancing transparency of contributors with confidentiality and the credibility of statistics.
- Undertaking measures to ensure the research had sufficient contributors to provide meaningful reports across product categories, states and nationally.
- Establishing rules around data reporting and access guidelines for industry data.

The following elements have been finalised.

Identifying industry target list	To ensure data credibility
Product Group Identification	Due to the volume of participants required, it was necessary to establish group for an easy data collection and flexible reporting
Supply Chain Maps	The industry supply chain was mapped. Data capture points were identified to avoid double counting of product and ensure relevant data capture.
Formulation of data input sheets	Product categories and distribution channels were identified and refined. This information was then collated in an easy to use input sheet for greenlife production, allied suppliers and growing media suppliers
Report Formats	Developing reports, identifying access and different levels including a structure with a free report to contributors.

It was widely promoted and awareness was high but adoption of the program by industry was not with the monthly data collection failing to launch.

In the absence of the monthly collection and still with the need to capture data, negotiations between the third party researcher GfK ensured NGIA could utilise all the mapping and a modified methodology to conduct a 'snap shot' survey of the industry.

The anonymous online survey was conducted by GfK Informark and sufficient organisations contributed for the Industry to capture some usable information including:

1. Business type
2. Postcode
3. Total area under production for the financial years 11, 12, 13 (if available)
4. Turnover for the financial years 11, 12, 13 (if available)
5. FTE staff for the financial years 11, 12, 13 (if available)

The results of the survey were circulated to the contributors who requested the data and the industry has captured some basic but usable figures and trending data.

It remains, that across all three data collection sectors, being greenlife producers, allied trade and growing media that education is required to encourage participation in market analysis projects such as this. The benefits to a business in possession of this information are great but require further communication. Additionally, an Industry in possession of more detailed data would be stronger and more influential.

INTRODUCTION

Following the conclusion of the industry's Market Monitor, NY11004 Industry Market Data was born out of a critical need to capture timely and accurate data for analysis on the Australian nursery and garden industry.

The need was identified after an assessment found a broad range of accessible data on the industry proved to be lacking in accuracy, frequency, integrity.

To assess contraction or growth of industry, understand employment figures and size (Ha) of production, the industry considers results from ABS & ABARES censuses and surveys including the reports released and also through ABS's Table Builder facility. Additionally, NGIA accesses other agency data including:

- The **Levies Revenue Service (LRS)** collect the nursery products levy on behalf of industry and where it is invested and managed by HAL. The levy is currently set at 5% of the wholesale value of the container. As an industry the levy receipts provide basic trending data. The limitations of this data are that levy payers are not identifiable and the type of container is unknown. Both these details would enhance this information as it would give an insight into the market share of operators and where in the value chain the intended product sits.

- The **Australia Tax Office ATO)** taxation statistics. The ATO uses the same ANZIC classification as the ABS. There is often a delay in the release of these figures. For example, in February 2014 the most recent figures available were for the financial year 2010-2011.

- Queensland Lifestyle Horticulture Industry Survey report of July 20113. This was conducted by the **QLD Department of Employment, Economic Development & Innovation**. To our knowledge this is the most intensive State agency survey conducted and was relevant to QLD only.

Of concern is the variation in the figures that are reported and how relevant businesses are captured. This is despite giving consideration to the variation from different financial years and guidelines within which the reports are published such as definitions, exclusions and inclusions.

Allowing for a margin of error between these sources, they often report results with significant differences. As a result of this, the nursery industry commissioned our own research project to establish a credibly sourced picture of the industry.

NY11004 Industry Market Data was an ambitious project to engage an independent market research company, to embark on a journey to collect accurate industry market statistics.

This project sought the support of all industry greenlife producers, allied traders and growing media suppliers in the collection of monthly industry statistics. With input into the project extending to producers and suppliers to primary industry, forestry and more, the project was the largest of its kind seen by the nursery industry.

The sole purpose of this project was to provide industry operators and industry bodies with useful, timely information about the nursery industry market.

For participating businesses, the original strategy would have opened the door on markets across different segments and distribution channels, nationally and by state. They would have had the ability to track trends against historical data and use this information to enhance operations.

Importantly, the combined information of all contributors would have delivered a powerful advocating opportunity for nursery industry association bodies and key stakeholders. With this kind information industry representatives would have been able to analyse and harness the data for the benefit of all industry operators. For example to measure the benefits of the current industry campaign 202020Vision on production growers.

As has been indicated in previous milestones, the challenges to engaging the industry in the original data collection process were mountainous and ultimately unattainable. Unfortunately, the original format identified did not secure the required participant numbers for a credible collection.

However, all was not lost with intensive formulation of this data collection project resulting in some fantastic supply chain mapping, categorisation and summary report formats for participants and information that will be utilised in in different industry arenas including liaison with statistical houses in an effort to improve the collections currently available.

Attention turned to approaching the ABS to undertake compulsory surveying on behalf of the industry. NGIA acknowledged there would be limitations to this data but accepted that there were and continue to be, few choices remaining. Quotes for this work to took six months to receive from first request and on receipt the fee for service was extreme and financially unachievable for industry.

Nevertheless, with the flexibility of the third party researcher, and after comprehensive consultation with the industry leadership groups and Horticulture Australia, we were able to modify the project to enable capture of data to using a ‘snap shot’ survey method. The nursery industry has achieved an anonymous ‘point in time’ data collection for the financial years of 2011, 2012 and 2013.

MATERIALS AND METHODS

Research Strategy - monthly supply

In an immediate attempt to instil confidence in the industry a Reference Group was appointed in early November 2011 to:

- Be a source of information for each sector to the consultant/researcher.
- Provide input into market definitions, structure of the reports, identifying/overcoming challenges to participation etc.
- Participate in review meetings and provide recommendations on the data and reporting structure to the consultant/researcher.
- To champion the research and undertaken encouragement and education of their industry sector to participate as a contributor to the project.

A tender process was then conducted to appoint an independent research consultant and this resulted in the appointment of GfK Informark by February 2012.

The first reference group meeting attended also by NGIA program managers and GfK Informark was held in April 2012 with additional meetings in August 2012 to finalise the research methodology.

In formulating the methodology and having regard for past projects the following was considered by the reference group.

- How to manage industry expectations for the research.
- How to balance organisational capability to supply data with the need for the research to deliver useful information.
- Ensuring submission forms are easy to follow and use.
- Ensuring the report packages provide useful information that is easy to interpret.
- Balancing transparency of contributors with confidentiality and the credibility of statistics.
- Undertaking measures to ensure the research had sufficient contributors to provide meaningful reports across product categories, states and nationally.
- Establishing rules around data reporting and access guidelines for industry data.

Appendix A contains the final supply chain mapping which directed the methodology for data collection.

Having regard for the above, GfK and NGIA commenced a process of refining the information and seeking input from industry and state bodies. As a result, target lists for participants were identified and classed into product groups; supply chain maps were finalised; data input sheets (See Appendix B) were prepared during which time product categories and definitions were refined and; sample report packages (See Appendix C) were prepared.

Following these project finalisations contracts between NGIA and GfK Informark took some negotiation. Having been made aware of feedback from the industry, NGIA negotiated with GfK a structure that would provide one free report to the contributing businesses each year of the reporting project. The various fee structures were reviewed and approval processes were sought via NGIA Board and the IAC.

Following an intensive campaign to attract contributors to the program without success, the project was put on hold at the IAC Meeting in February 2013 to enable consultation of the various leadership groups and stakeholders in the project. This meeting also called for NGIA to look for alternatives to data collection including requesting we engage with more vigour, the option of accessing ABS data.

In April 2013 the Industry Consultation Meeting proposed that the project revisit the option of a ‘snap shot' survey. This meeting was attended by the NGIA Board, State Presidents and CEO's.

In the same month, the concept of a ‘snap shot' survey was raised with GfK Informark for their consideration of how it might work. Gerard Sweeney, General Manager of Informark presented some ideas and NGIA provided input on this approach. Importantly, Informark agreed that work on a snap shot survey would be incorporated under the current contract with Informark.

In May 2013 the alternative option for a ‘snap short' survey was agreed by the IAC Meeting and these recommend changes were discussed the Horticulture Australia on 4 July 2013 and it was the changes to convert to a ‘snap shot' survey were agreed.

Research Strategy - ‘Snap Shot' Survey

Using the information and mapping and categorisation ground work from the original format, an online survey was designed and managed by independent third party GfK Informark.

Contributors who signed up to the original program were advised of the change in format by email mid-September 2013.

A participation (incentive) letter was then mailed early October to approximately 2000 people on the NGIA database. The letter was drafted with a tone and specific information designed to drive participation in the survey. This letter also formed a notice for State & Territory Associations to use in their publications.

GfK Informark then forwarded an email on 16 October which attached the link to the survey. The survey sought the following information:

- Business type (check box: options will be defined)
- Postcode
- Total area under production for the financial years 11, 12, 13 (if available)
- Turnover for the financial years 11, 12, 13 (if available)
- FTE staff for the financial years 11, 12, 13 (if available)

Participants then submitted their responses. They also had the option to request a summary report be emailed to them and were also able to print their own responses. The survey was scheduled to be open for 4 weeks however, we continued the survey for 6 weeks during which time weekly reminders were sent to businesses who hadn't responded.

A copy of the online survey format is attached at Appendix D.

Australian Bureau of Statistics- Further investigations

In November 2012, NGIA commenced researching the ABS systems, formats and structure in an effort to understand why the ABS's figures were significantly different to the Australian nursery industry's assumptions of its market position. This led to a number of concerns being identified.

NGIA commenced discussions with ABS to raise our concerns but also to put raise the profile of the nursery industry and horticulture in the eyes of the Director of the Rural, Environmental and Agricultural Statistics Brach (REASB).

Under instruction from the IAC in February 2013, NGIA continued discussions with ABS regarding user funded surveying of industry.

NGIA was invited to participate in the REAS Forum held 7 March 2013 in the ABS Canberra offices. At the conclusion of this meeting Katie Hutt, the Director of REASB provided an *verbal indicative cost for a user funded survey of close to one million dollars.*

Liaison continued with the ABS to work to review the various methods for NGIA to access data on the nursery industry including a request for ABS to provide to NGIA the user funded survey format and results from the 1997. In a discussion on 15 April 2013, ABS verbally wrapped up assistance for NGIA indicating that ABS have 'pretty much exhausted the investigations for Nursery' and that 'they need to draw a line under the work they have done'.

This was of course disappointing however, NGIA continued to submit specific questions into the survey review process which were declined and we continued to follow up the survey and results from 1997. Finally, this was received in August 2013 (5 months after it was requested).

At this point NGIA requested two quotes from ABS for user funded surveys. The first quote was to be an exact replica of the 1997 survey and second quote was a variation on the 1997. After continue follow up, these quotes were received in February 2014 for the amounts of $1,012,054 and $825,669 respectively (6 months after it was requested). See Appendix E.

RESULTS AND DISCUSSION

Despite the intensive activities to engage businesses in the original strategy of monthly data supply, only 40 businesses signed up.

The Industry Reference Group for the project had identified 300 different businesses across the greenlife production, growing media and allied product sectors. Those target businesses were broken down by sector and then State and were called ‘product groups’. This would have allowed individual product groups to be launched without need to wait for the full 300 to participate.

The ‘300’ target list represented a ‘best informed guess’ of which businesses would capture approximately 80% of each of the market sectors.

In accordance with the Industry Reference Groups aims that supported only the release of credible data and to protect the confidentiality of the contributors, not one product group was launched.

Product Group	Contract Target	NGIA Target	Confirmed	Tentative	Unknown	No
Greenlife NSW/ACT	82	88	12	5	70	1
Greenlife VIC	53	56	8	7	38	3
Greenlife QLD	40	42	6	3	30	3
Greenlife WA	18	19	1	1	14	3
Greenlife SA	52	52	4	1	47	0
Greenlife TAS	13	14	1	1	8	4
Greenlife NT	10	11	2	1	7	1
Allied Garden Product	17	20	3	7	10	0
Growing Media	23	23	3	5	12	3

Table 1: Status of monthly data contributors as at November 2012.

Anecdotal feedback from State & Territory Associations and industry stakeholders indicated that awareness levels of the research project to high. Despite this, the following reasons were identified for non-participation:

- Not collecting the data in order to submit it to the project
- Submitting monthly data felt too onerous and a big time investment
- Fear of data sharing
- Fear of how data would be used short and long term
- Not a priority for the business
- Wanted more than one free report a year
- Didn’t see the importance for industry
- Didn’t see the benefits for their business.

Interestingly, the commentary provided by the ABS for the results of the 1997 user funded survey found the following:

*“**Reliability of data:***

Overall, respondents had significant problems providing the majority of dissections requested on the form. The quality of the report data for questions requiring detailed splits is uncertain as it appears from the comments received and respondents pattern of response that many were only able to provide 'rough' estimates. Nurseries, especially small, hobby and part-time nurseries did not have this sort of detailed information. Many respondents commented that they would need to go back and examine original documentation which would be incredibly time consuming.

This indicates that in 17 years of industry working to capture accurate market information on the industry, the position of industry stakeholders has not shifted. This is a deep concern for industry. It will ultimately force reliance on systems that do not specifically consider the necessary data requirements of the greenlife market.

Implementing the 'snap shot' survey meant compromising on a number of vital elements of the monthly data collection. These compromises were to ensure we maximised the output from the survey and included:

- Survey was anonymous – except where businesses requested a summary report. In this case, NGIA was not aware of the business name and GfK only used the data supplied to provide the summary report requested. What this meant for NGIA was not knowing who participated meant not know likely size of the market captured.

- Postcodes would allow us to view data by regional area – except where the data would identify a business in which case it would not be provided in that region. This occurred to often and so it is impossible to use the postcode data without uncovering the data supplier.

On the positive side:

- Requesting data across three years provided trending data and generally speaking the results show an increase in production area, turnover and full time equivalent employees.

- As the survey would be going to the entire person database on NGIA's system, this would mean that retailers would also be sent the survey. Rather than exclude them, we included them to see the preparedness and detail they would give. The results of this information is not usable, however the system is now established to include them.

- The online system only allowed one submission from each IP address which would mean that we avoid counting businesses twice. If a national company submitting in every state required additional entries the links would be sent separately on request.

The results of the 'snap shot' survey are attached at Appendix F. A brief outline of the response result is below:

- Over 300 businesses responded to the survey of which 290 of them had legitimate responses.
- Based on the email circulation of survey links this represented a response rate of 18%.
- In the original project 300 businesses were identified by the various stakeholders as statistically relevant. 92 of these businesses participated in the survey. As the results are anonymous, this has been determined only by email addresses and the information is not available to NGIA for confidentially purposes. This represents approximately 32% of those businesses deemed statistically relevant.

The ABS report *75030DO001_201213 Value of Agricultural Commodities Produced, Australia, 2012-13* and *7121.0 - Agricultural Commodities, Australia, 2012-2013* both released in May 2014 has captured data to June 30, 2013 which corresponds to the survey. A brief consideration of their data compared to the survey results shows the following:

Comparison of figures from ABS and NGIA for greenlife production only

	ABS	NGIA 2013 Survey
Number of businesses	2711^	196
Nursery Production Turnover ($m)	663.04*	311.8
Production area (Ha)	16290#	816
Full time equivalent employees	3464^^	2298

^ 7121.0 - Agricultural Commodities, Australia, 2012-2013 (nursery undercover & nursery outdoor)

**75030DO001_201213 Value of Agricultural Commodities Produced, Australia, 2012-13 (nursery undercover & nursery outdoor)*

 # 7121.0 - Agricultural Commodities, Australia, 2012-2013 (nursery undercover & nursery outdoor)

^^ 2011 Census (nursery undercover & nursery outdoor)

A couple of interesting comparisons which prove the Australian nursery and garden industry's need to continue to work towards capturing accurate industry data include:

1. The turnover of approximately 200 nursery production businesses equate to 47% (almost half) of the turnover ABS reports as the turnover attributed to 2711 businesses.

2. Again, the employment of 2298 staff is attributed to 196 businesses in the NGIA survey whereas the ABS census data for 2011 indicates 3464 across 1794[1].

Incidentally, it's worth noting the count for businesses reported by ABS year ending 12/13 year indicates an increase of +900 businesses from year ending 11/12.

The results of online survey were emailed in April 2014 to every contributor who requested a copy.

[1] 71210DO002_201112 Agricultural Commodities, Australia, 2011-12 which is the report for the same time series as the Census.

TECHNOLOGY TRANSFER

The market data project is critical for industry. As such a number of activities took place to educate the industry on the need for data and to encourage their participation in the collection project. These included:

- Expression of Interest – designed to alert targeted businesses to the impending research project and to gauge the interest the target group.
- NGIA Website – market research pages - the NGIA website hosted all the information available on the research and provides resources for contributors, those interested in contributing, and those unable to contribute. It provided sample reporting, sample input sheets and the final supply maps.
- Advertising - an advertisement was developed for use by State and Territory organisations to promote and support the research.
- Media Releases – announced the research and promoted the benefits and coverage received. See Appendix G
- Presentations were made to industry. See Appendix G
- Information booklet: Your guide to the new market research program for the nursery and garden industry (see Appendix H), was printed and enclosed with an invitation to the target group to participate. The invitation included:
    - Co-signed letter from the State President and NGIA CEO Robert Prince.
    - Information Booklet: Your guide to the new market research program for the nursery and garden industry
    - Contributor Agreement
    - Report Request Form
    - Reply paid envelope.
- Call backs by NGIA regarding the invitation commenced in the first week of November 2012.
- The second round of participation invitations were circulated on 5 December 2012. This was an HTML that directed readers to the NGIA website where they were able to download a Contributor Agreement.
- HTML to major retail buyers – sought support from the major buyers to encourage their customers to participate in the research.

While awareness was high the project did not proceed in a monthly data collection structure.

The communication activities continued for the snap shot survey and the preliminary results of the survey were outlined at the NGIA Conference.

The results required further cleansing and once completed the results of the survey were made available to all contributors in April 2014. Further communication of the results is referred to in the recommendations below.

RECOMMENDATIONS

It is apparent given the comparison of recent ABS data and results from the snap shot survey that the industry should continue to work to capture data in some form.

It is recommended that an Analyst be appointed to undertake an in depth analysis of all the data available to the Nursery & Garden Industry in order to ascertain with some credibility the state of play industry in a timely manner.   Potential sources for this analyst could include:

- NGIA survey data
- Levies & Revenue Service receipt
- Pot sales data including pot size
- Controlled release fertiliser sales from the major allied traders
- Growing media sales from the major media suppliers

It is also recommend that a second survey be conducted for the year ending 14, 15 and 16 with a view to making a comparison with the businesses who participated in the original survey and to engaging additional contributors through communication and education.

It is also recommended that NGIA continue to educate the industry in the need for the data. With awareness being high, energy should be directed to conversion of businesses. If this is the case then, a basic data collection format would need to be established to ensure converted businesses are immediately engaged.

The concerns of Industry prompted active participation with the ABS, specifically the Rural Environmental Agricultural Statistics Branch (REASB). This liaison has ensured NGIA has been involved in a number of their activities including an opportunity to submit questions for the agricultural surveying (which were declined, but allowed our involvement nonetheless).

Additionally, the release of the Farming Institute’s report into Australian Agricultural Statistics prompted a review by REASB into its data collection methods. The relationship with ABS ensured NGIA was aware of the review. NGIA made two submissions and participated in a forum for the review enabling the Industry to highlight our concerns over the ABS data collection and reporting structures. See Appendix I and J for these submissions. It is recommended that the Industry this liaison with a view to influencing the surveying and collection structures.

Finally, given the financially unachievable nature of the quotes for user-funded surveys provided by the ABS, it is recommended that HAL lead a joint horticulture user funding survey that ensures greenlife production is captured appropriately.

APPENDICES

The following appendices relate to the outcomes of the project:

A. Supply Chain Maps
B. Data Input Sheets
C. Sample Report
D. Online ‘Snap Shot‘ Survey format
E. Quotes from ABS for user funded surveys
F. ‘Snap Shot‘ Survey Results Report
G. Media received during promotion and presentations conducted.
H. Information Booklet
I. National Agricultural Statistic Review Submission
J. Response to Preliminary Findings of the NASR

APPENDIX G

Confirmed Media

April 2012 Australian Horticulture Magazine Lack of monitoring highlighted
June 2012 NGISA Nursery Notes Market Research
June 2012 Your Levy @ Work New nursery industry market research project offers great value and huge potential to industry operators
July 2012 Hort Journal Research project to benefit industry
July 2012 Groundswell New nursery industry market research project offers great value and huge potential to industry operators
July 2012 Nursery & Garden News (NSW&ACT)How big is our industry?
Aug 2012 NGISA Nursery Notes New nursery industry market research
Aug 2012 Outdoor Design Source (Enews) NGIA Market Research Project
Aug 2012 Greenworld Are we being taken for granted?
Aug 2012 Greenworld New nursery industry market research project offers great value and huge potential to industry operators
Sep 2012 Greenworld Industry Market Research Project
Oct 2012 Leaflet (QLD) New Nursery Industry Market Research Project offers a free report on your business performance
Oct 2012 Nursery & Garden News
(NSW&ACT)
Mention: David Foster, CEO editorial
Oct 2012 Nursery Notes (NT) Businesses targeted for new industry market research
Nov 2012 Enews (WA) Industry Market Research Program
Nov 2012 NGISA Nursery Notes Businesses targeted for new industry market research
Nov 2012 Leaflet (QLD) Businesses targeted for new industry market research
Nov 2012 Your Levy @ Work Businesses targeted for new industry market research
Nov 2012 Outdoor Design Source (ENews) Has your business been targeted?
Dec 2012 Your Levy @ Work Confidentiality a priority for industry market research
Dec 2012 Outdoor Design Source (ENews) Industry market research project
Dec 2012 Enews (WA) Confidentiality a priority for industry market research
Jan 2013 Nursery & Garden News (NSW&ACT) Confidentiality a priority for industry market research

Presentations tailored specifically for each State were made on the following occasions:

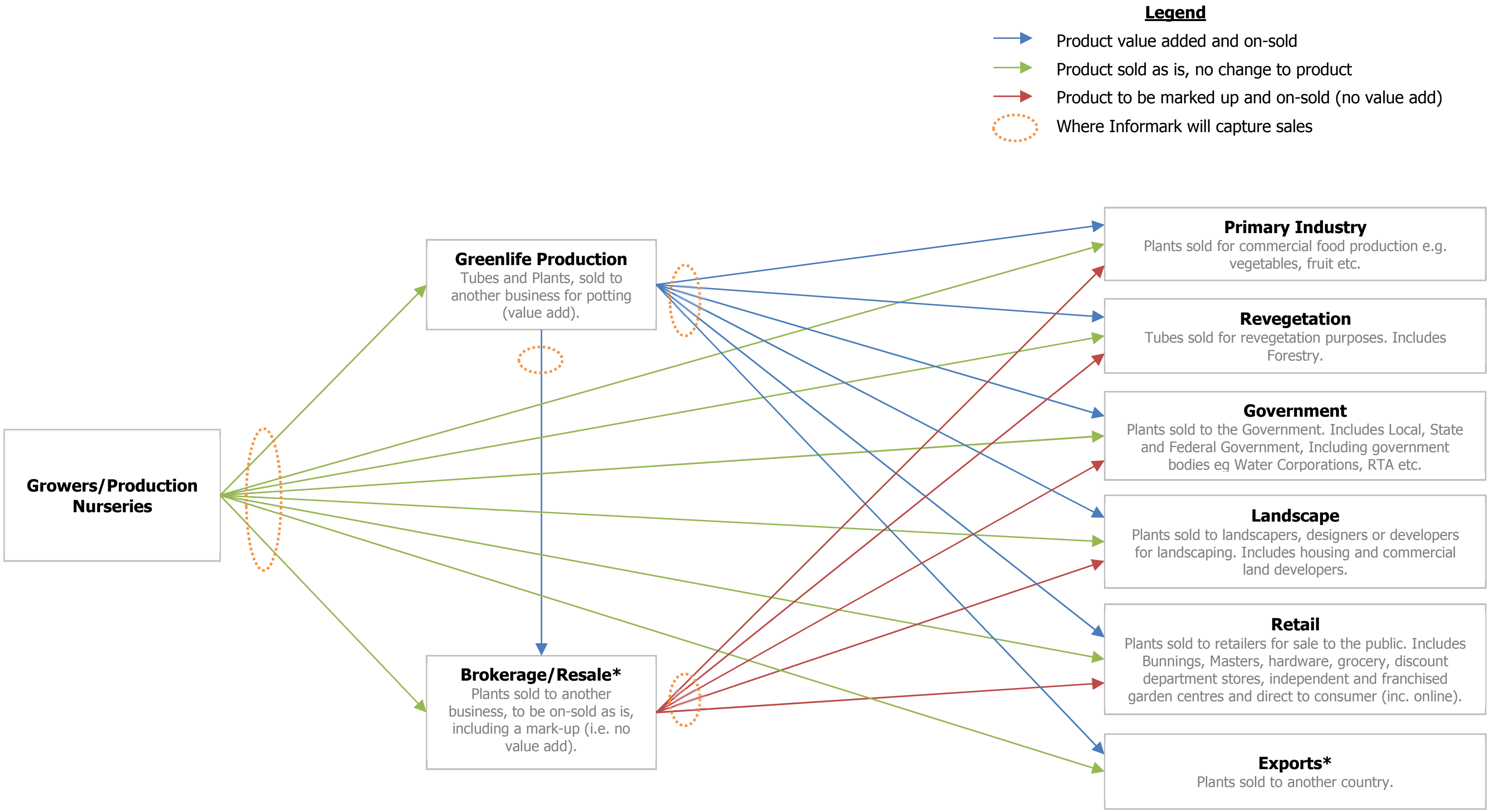
3 July 2012 – VIC Briefing Session – Trade Day, Caribbean Gardens, VIC
12 July 2012 – QLD Briefing Session postponed
17 July 2012 – VIC Tree & Shrub Growers Meeting Presentation – Kingston Golf Club, VIC
18 July 2012 – SA Briefing Session postposed
24/25 July 2012 – QLD attendance at Green Expo – discussing project with all exhibitors
28 August 2012 – NSW Breakfast presentation –Dural Country Club, NSW

Informark Sell-In Service

Nursery & Garden Industry Australia Market Research Project

Greenlife Australia Supply Chain 2012

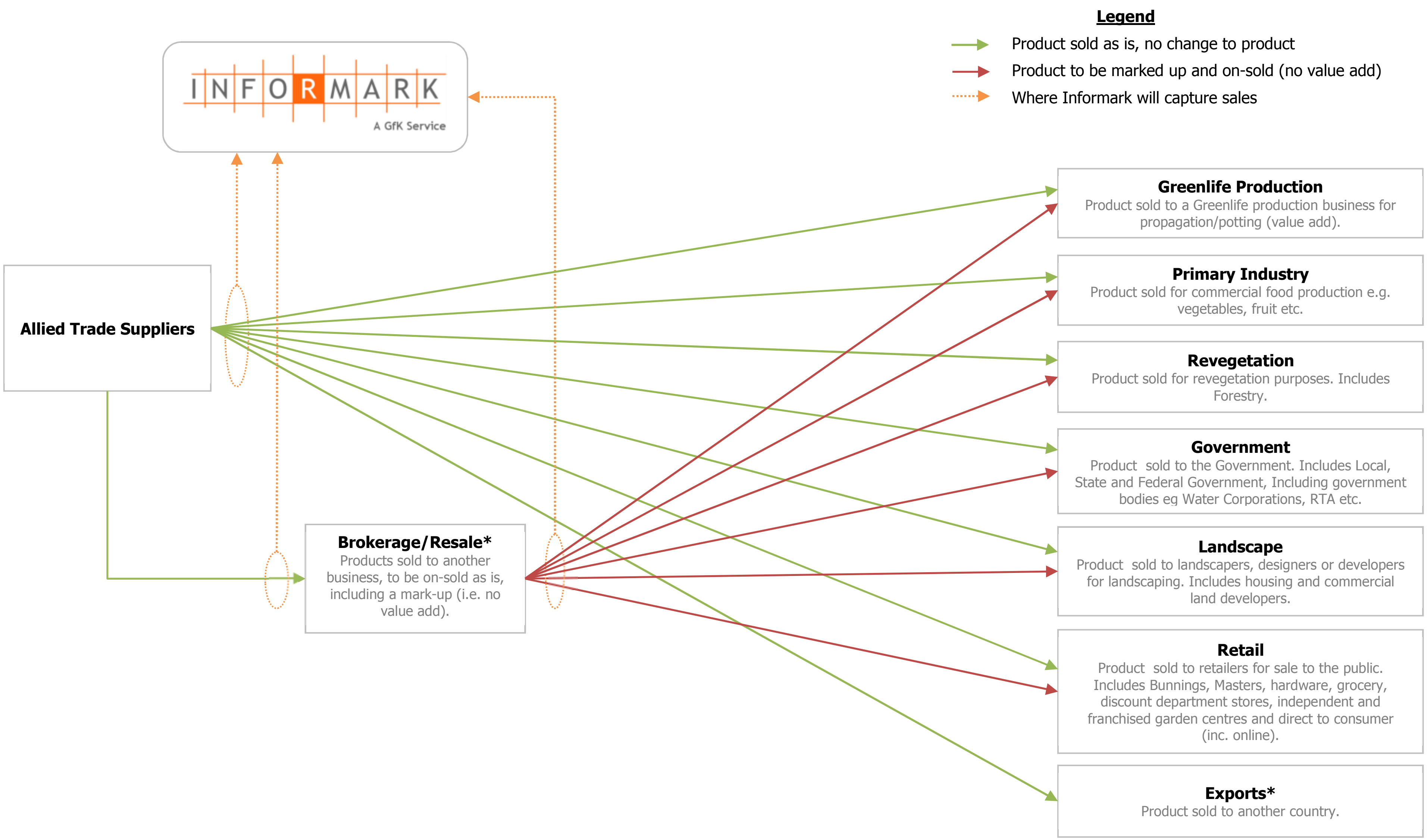
Reference month (i.e. as at) October 2012



***product sold into these channels will be captured by Informark but excluded from the "Total" figures for each category so as to avoid double counting.**

NGIA Market Research Project
Allied Garden Product Australia - Supply Chain 2012

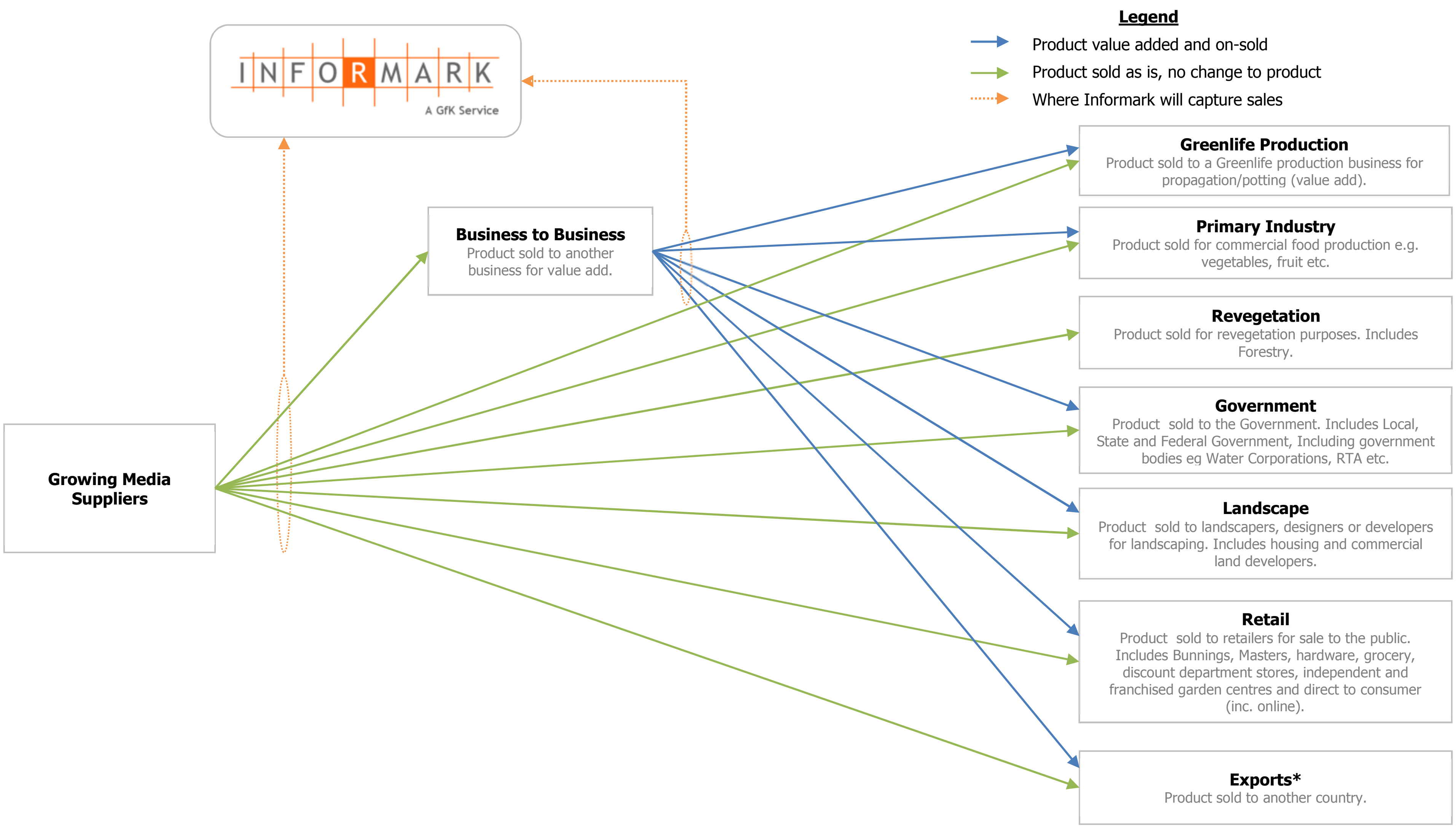
as at August 2012



***product sold into these channels will be captured by Informark but excluded from the "Total" figures for each category.**

NGIA Market Research Project
Growing Media Australia - Supply Chain 2012

as at August 2012



***product sold into these channels will be captured by Informark but excluded from the "Total" figures for each category.**

GfK Sell-In Service

Nursery & Garden Industry Market Research
Allied Garden Product

Data Input Instructions

1. Complete the fields in light green on each sheet. There is one sheet for exports, and a sheet for sales to each state. If there are no sales to a particular state please leave that sheet blank.
2. Submit the completed form to GfK Sell-In by the **10th** calendar day after **Month** end by uploading this file to the secure GfK Sell-In website **https://www.informark.com.au/**, or fax to (02) 6162 9522.

Company:

Location of Business:

Contact Name: (i.e. the person GfK Sell-In should contact if there are any queries with the data.)

Month:

Total Hours Worked: (i.e. estimate of total hours worked by all staff in the business this month, including temporary staff and owners. Note that if your company reports sales in either Greenlife and/or Growing Media then this figure will only be counted once. The aggregated industry figure will be used by NGI for lobbying purposes.)

Go to Sheet

- Exports
- NSW/ACT
- VIC
- QLD
- SA
- NT
- WA
- TAS

Note that company **confidential** data will not be disclosed to any third parties unless express written permission is given to do so.

This project is funded using the Nursery Industry Levy which is matched by the Australian Government through Horticulture Australia.

GfK Sell-In Service

Nursery & Garden Industry Market Research
Allied Garden Product

Destination of Sales: **Exports**

Home

Next Sheet >

Sales **into** these channels:

Sales **of** these products:

			Export *
			Product sold to another country.
Allied Garden Product - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.			
Packet Seeds & Bulbs		Includes herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.)	
Allied Propagation		Includes mini greenhouses, seed trays, peat pots, seed raising potting mix, bulb mix, sundry items and seed kits.	
Lawn Care (only)		Includes fertilisers, selective herbicides, insecticides, fungicides, multipurpose/combination, lawn top dressing, lawn seed and spreaders.	
Plant Food		Includes controlled release fertiliser (CRF), compound, granular, pelletised organic, liquid fertilisers, plant tonics, soluble, straight fertilisers, specialty and raw manures.	
Plant Protection		Includes fungicides, insecticides, herbicides, pre-emergent, combinations and snail & slug.	
Home Pest (crawling only)		Includes aerosols, sticky traps, electronic, concentrates, RTU triggers, granules, pellets, blocks, traps, roll-on and deterrents (dog, cat, other). Excludes flying.	
Water Management		Includes anti-transpirants, water crystals, granules and liquid soil wetters.	
Pots & Containers	Decorative	Includes ceramic pots, glazed pots, terracotta pots, fibreglass pots, hanging baskets, plastic pots & saucers.	
	Commercial Production	Includes all plastic pots, biodegradable pots, natural fibre pots, punnets, propagation and forestry trays, advanced tubs.	
	Commercial Recycled	Includes all plastic pots, punnets, propagation and forestry trays, advanced tubs.	
	Other	Includes planter bags, woven bags.	
Merchandise		Includes watering, cutting, digging, literature, protection, growing supports. Excludes gift ware.	
Allied Garden Product - Sales in volume terms.			
Controlled Release Fertiliser (only) (kg)		Includes all insoluble, granulated fertiliser that release nutrients gradually	
Pots & Containers (units)		Includes all pots & containers as defined above.	

Note that company **confidential** data will not be disclosed to any third parties unless express written permission is given to do so.

***** these channels will not be counted in the "Total" figures for each category; there will be separate analysis available for these channels.

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Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research

Allied Garden Product

Destination of Sales: NSW/ACT

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Sales **into** these channels:

Sales **of** these products:

			Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail: Corporates	Retail: Independents & Other
			Product sold to a Greenlife production business for propagation/potting.	Product sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Product sold for revegetation purposes. Includes Forestry.	Product sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Product sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Product sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Product sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Allied Garden Product - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.										
Packet Seeds & Bulbs		Includes herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.)								
Allied Propagation		Includes mini greenhouses, seed trays, peat pots, seed raising potting mix, bulb mix, sundry items and seed kits.								
Lawn Care (only)		Includes fertilisers, selective herbicides, insecticides, fungicides, multipurpose/combination, lawn top dressing, lawn seed and spreaders.								
Plant Food		Includes controlled release fertiliser (CRF), compound, granular, pelletised organic, liquid fertilisers, plant tonics, soluble, straight fertilisers, specialty and raw manures.								
Plant Protection		Includes fungicides, insecticides, herbicides, pre-emergent, combinations and snail & slug.								
Home Pest (crawling only)		Includes aerosols, sticky traps, electronic, concentrates, RTU triggers, granules, pellets, blocks, traps, roll-on and deterrents (dog, cat, other). Excludes flying.								
Water Management		Includes anti-transpirants, water crystals, granules and liquid soil wetters.								
Pots & Containers	Decorative	Includes ceramic pots, glazed pots, terracotta pots, fibreglass pots, hanging baskets, plastic pots & saucers.								
	Commercial Production	Includes all plastic pots, biodegradable pots, natural fibre pots, punnets, propagation and forestry trays, advanced tubs.								
	Commercial Recycled	Includes all plastic pots, punnets, propagation and forestry trays, advanced tubs.								
	Other	Includes planter bags, woven bags.								
Merchandise		Includes watering, cutting, digging, literature, protection, growing supports. Excludes gift ware.								
Allied Garden Product - Sales in volume terms.										
Controlled Release Fertiliser (only) (kg)		Includes all insoluble, granulated fertiliser that release nutrients gradually								
Pots & Containers (units)		Includes all pots & containers as defined above.								

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* these channels will not be counted in the "Total" figures for each category; there will be separate analysis available for these channels.

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HAL Horticulture Australia

Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Allied Garden Product

Destination of Sales: VIC

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Sales **into** these channels:

Sales **of** these products:

			Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail	
									Corporates	Independents & Other
			Product sold to a Greenlife production business for propagation/potting.	Product sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Product sold for revegetation purposes. Includes Forestry.	Product sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Product sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Product sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Product sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Allied Garden Product - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.										
Packet Seeds & Bulbs		Includes herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.)								
Allied Propagation		Includes mini greenhouses, seed trays, peat pots, seed raising potting mix, bulb mix, sundry items and seed kits.								
Lawn Care (only)		Includes fertilisers, selective herbicides, insecticides, fungicides, multipurpose/combination, lawn top dressing, lawn seed and spreaders.								
Plant Food		Includes controlled release fertiliser (CRF), compound, granular, pelletised organic, liquid fertilisers, plant tonics, soluble, straight fertilisers, specialty and raw manures.								
Plant Protection		Includes fungicides, insecticides, herbicides, pre-emergent, combinations and snail & slug.								
Home Pest (crawling only)		Includes aerosols, sticky traps, electronic, concentrates, RTU triggers, granules, pellets, blocks, traps, roll-on and deterrents (dog, cat, other). Excludes flying.								
Water Management		Includes anti-transpirants, water crystals, granules and liquid soil wetters.								
Pots & Containers	Decorative	Includes ceramic pots, glazed pots, terracotta pots, fibreglass pots, hanging baskets, plastic pots & saucers.								
	Commercial Production	Includes all plastic pots, biodegradable pots, natural fibre pots, punnets, propagation and forestry trays, advanced tubs.								
	Commercial Recycled	Includes all plastic pots, punnets, propagation and forestry trays, advanced tubs.								
	Other	Includes planter bags, woven bags.								
Merchandise		Includes watering, cutting, digging, literature, protection, growing supports. Excludes gift ware.								
Allied Garden Product - Sales in volume terms.										
Controlled Release Fertiliser (only) (kg)		Includes all insoluble, granulated fertiliser that release nutrients gradually								
Pots & Containers (units)		Includes all pots & containers as defined above.								

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Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Allied Garden Product

Destination of Sales: QLD

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Sales **into** these channels:

Sales **of** these products:

			Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail	
									Corporates	Independents & Other
			Product sold to a Greenlife production business for propagation/potting.	Product sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Product sold for revegetation purposes. Includes Forestry.	Product sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Product sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Product sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Product sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Allied Garden Product - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.										
Packet Seeds & Bulbs		Includes herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.)								
Allied Propagation		Includes mini greenhouses, seed trays, peat pots, seed raising potting mix, bulb mix, sundry items and seed kits.								
Lawn Care (only)		Includes fertilisers, selective herbicides, insecticides, fungicides, multipurpose/combination, lawn top dressing, lawn seed and spreaders.								
Plant Food		Includes controlled release fertiliser (CRF), compound, granular, pelletised organic, liquid fertilisers, plant tonics, soluble, straight fertilisers, specialty and raw manures.								
Plant Protection		Includes fungicides, insecticides, herbicides, pre-emergent, combinations and snail & slug.								
Home Pest (crawling only)		Includes aerosols, sticky traps, electronic, concentrates, RTU triggers, granules, pellets, blocks, traps, roll-on and deterrents (dog, cat, other). Excludes flying.								
Water Management		Includes anti-transpirants, water crystals, granules and liquid soil wetters.								
Pots & Containers	Decorative	Includes ceramic pots, glazed pots, terracotta pots, fibreglass pots, hanging baskets, plastic pots & saucers.								
	Commercial Production	Includes all plastic pots, biodegradable pots, natural fibre pots, punnets, propagation and forestry trays, advanced tubs.								
	Commercial Recycled	Includes all plastic pots, punnets, propagation and forestry trays, advanced tubs.								
	Other	Includes planter bags, woven bags.								
Merchandise		Includes watering, cutting, digging, literature, protection, growing supports. Excludes gift ware.								
Allied Garden Product - Sales in volume terms.										
Controlled Release Fertiliser (only) (kg)		Includes all insoluble, granulated fertiliser that release nutrients gradually								
Pots & Containers (units)		Includes all pots & containers as defined above.								

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* these channels will not be counted in the "Total" figures for each category; there will be separate analysis available for these channels.

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GfK Sell-In Service

Nursery & Garden Industry Market Research
Allied Garden Product

Destination of Sales: SA

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail	
								Corporates	Independents & Other
		Product sold to a Greenlife production business for propagation/potting.	Product sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Product sold for revegetation purposes. Includes Forestry.	Product sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Product sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Product sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Product sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Allied Garden Product - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Packet Seeds & Bulbs	Includes herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.)								
Allied Propagation	Includes mini greenhouses, seed trays, peat pots, seed raising potting mix, bulb mix, sundry items and seed kits.								
Lawn Care (only)	Includes fertilisers, selective herbicides, insecticides, fungicides, multipurpose/combination, lawn top dressing, lawn seed and spreaders.								
Plant Food	Includes controlled release fertiliser (CRF), compound, granular, pelletised organic, liquid fertilisers, plant tonics, soluble, straight fertilisers, specialty and raw manures.								
Plant Protection	Includes fungicides, insecticides, herbicides, pre-emergent, combinations and snail & slug.								
Home Pest (crawling only)	Includes aerosols, sticky traps, electronic, concentrates, RTU triggers, granules, pellets, blocks, traps, roll-on and deterrents (dog, cat, other). Excludes flying.								
Water Management	Includes anti-transpirants, water crystals, granules and liquid soil wetters.								
Pots & Containers – Decorative	Includes ceramic pots, glazed pots, terracotta pots, fibreglass pots, hanging baskets, plastic pots & saucers.								
Pots & Containers – Commercial Production	Includes all plastic pots, biodegradable pots, natural fibre pots, punnets, propagation and forestry trays, advanced tubs.								
Pots & Containers – Commercial Recycled	Includes all plastic pots, punnets, propagation and forestry trays, advanced tubs.								
Pots & Containers – Other	Includes planter bags, woven bags.								
Merchandise	Includes watering, cutting, digging, literature, protection, growing supports. Excludes gift ware.								
Allied Garden Product - Sales in volume terms.									
Controlled Release Fertiliser (only) (kg)	Includes all insoluble, granulated fertiliser that release nutrients gradually								
Pots & Containers (units)	Includes all pots & containers as defined above.								

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* these channels will not be counted in the "Total" figures for each category; there will be separate analysis available for these channels.

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GfK Sell-In Service

Nursery & Garden Industry Market Research
Allied Garden Product

Destination of Sales: NT

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail: Corporates	Retail: Independents & Other
		Product sold to a Greenlife production business for propagation/potting.	Product sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Product sold for revegetation purposes. Includes Forestry.	Product sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Product sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Product sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Product sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Allied Garden Product - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Packet Seeds & Bulbs	Includes herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.)								
Allied Propagation	Includes mini greenhouses, seed trays, peat pots, seed raising potting mix, bulb mix, sundry items and seed kits.								
Lawn Care (only)	Includes fertilisers, selective herbicides, insecticides, fungicides, multipurpose/combination, lawn top dressing, lawn seed and spreaders.								
Plant Food	Includes controlled release fertiliser (CRF), compound, granular, pelletised organic, liquid fertilisers, plant tonics, soluble, straight fertilisers, specialty and raw manures.								
Plant Protection	Includes fungicides, insecticides, herbicides, pre-emergent, combinations and snail & slug.								
Home Pest (crawling only)	Includes aerosols, sticky traps, electronic, concentrates, RTU triggers, granules, pellets, blocks, traps, roll-on and deterrents (dog, cat, other). Excludes flying.								
Water Management	Includes anti-transpirants, water crystals, granules and liquid soil wetters.								
Pots & Containers: Decorative	Includes ceramic pots, glazed pots, terracotta pots, fibreglass pots, hanging baskets, plastic pots & saucers.								
Pots & Containers: Commercial Production	Includes all plastic pots, biodegradable pots, natural fibre pots, punnets, propagation and forestry trays, advanced tubs.								
Pots & Containers: Commercial Recycled	Includes all plastic pots, punnets, propagation and forestry trays, advanced tubs.								
Pots & Containers: Other	Includes planter bags, woven bags.								
Merchandise	Includes watering, cutting, digging, literature, protection, growing supports. Excludes gift ware.								
Allied Garden Product - Sales in volume terms.									
Controlled Release Fertiliser (only) (kg)	Includes all insoluble, granulated fertiliser that release nutrients gradually								
Pots & Containers (units)	Includes all pots & containers as defined above.								

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Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Allied Garden Product

Destination of Sales: WA

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail	
								Corporates	Independents & Other
		Product sold to a Greenlife production business for propagation/potting.	Product sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Product sold for revegetation purposes. Includes Forestry.	Product sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Product sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Product sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Product sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Allied Garden Product - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Packet Seeds & Bulbs	Includes herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.)								
Allied Propagation	Includes mini greenhouses, seed trays, peat pots, seed raising potting mix, bulb mix, sundry items and seed kits.								
Lawn Care (only)	Includes fertilisers, selective herbicides, insecticides, fungicides, multipurpose/combination, lawn top dressing, lawn seed and spreaders.								
Plant Food	Includes controlled release fertiliser (CRF), compound, granular, pelletised organic, liquid fertilisers, plant tonics, soluble, straight fertilisers, specialty and raw manures.								
Plant Protection	Includes fungicides, insecticides, herbicides, pre-emergent, combinations and snail & slug.								
Home Pest (crawling only)	Includes aerosols, sticky traps, electronic, concentrates, RTU triggers, granules, pellets, blocks, traps, roll-on and deterrents (dog, cat, other). Excludes flying.								
Water Management	Includes anti-transpirants, water crystals, granules and liquid soil wetters.								
Pots & Containers - Decorative	Includes ceramic pots, glazed pots, terracotta pots, fibreglass pots, hanging baskets, plastic pots & saucers.								
Pots & Containers - Commercial Production	Includes all plastic pots, biodegradable pots, natural fibre pots, punnets, propagation and forestry trays, advanced tubs.								
Pots & Containers - Commercial Recycled	Includes all plastic pots, punnets, propagation and forestry trays, advanced tubs.								
Pots & Containers - Other	Includes planter bags, woven bags.								
Merchandise	Includes watering, cutting, digging, literature, protection, growing supports. Excludes gift ware.								
Allied Garden Product - Sales in volume terms.									
Controlled Release Fertiliser (only) (kg)	Includes all insoluble, granulated fertiliser that release nutrients gradually								
Pots & Containers (units)	Includes all pots & containers as defined above.								

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Horticulture Australia

Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Allied Garden Product

Destination of Sales: TAS

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Sales **into** these channels:

Sales **of** these products:

			Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail: Corporates	Retail: Independents & Other
			Product sold to a Greenlife production business for propagation/potting.	Product sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Product sold for revegetation purposes. Includes Forestry.	Product sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Product sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Product sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Product sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Allied Garden Product - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.										
Packet Seeds & Bulbs		Includes herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.)								
Allied Propagation		Includes mini greenhouses, seed trays, peat pots, seed raising potting mix, bulb mix, sundry items and seed kits.								
Lawn Care (only)		Includes fertilisers, selective herbicides, insecticides, fungicides, multipurpose/combination, lawn top dressing, lawn seed and spreaders.								
Plant Food		Includes controlled release fertiliser (CRF), compound, granular, pelletised organic, liquid fertilisers, plant tonics, soluble, straight fertilisers, specialty and raw manures.								
Plant Protection		Includes fungicides, insecticides, herbicides, pre-emergent, combinations and snail & slug.								
Home Pest (crawling only)		Includes aerosols, sticky traps, electronic, concentrates, RTU triggers, granules, pellets, blocks, traps, roll-on and deterrents (dog, cat, other). Excludes flying.								
Water Management		Includes anti-transpirants, water crystals, granules and liquid soil wetters.								
Pots & Containers	Decorative	Includes ceramic pots, glazed pots, terracotta pots, fibreglass pots, hanging baskets, plastic pots & saucers.								
	Commercial Production	Includes all plastic pots, biodegradable pots, natural fibre pots, punnets, propagation and forestry trays, advanced tubs.								
	Commercial Recycled	Includes all plastic pots, punnets, propagation and forestry trays, advanced tubs.								
	Other	Includes planter bags, woven bags.								
Merchandise		Includes watering, cutting, digging, literature, protection, growing supports. Excludes gift ware.								
Allied Garden Product - Sales in volume terms.										
Controlled Release Fertiliser (only) (kg)		Includes all insoluble, granulated fertiliser that release nutrients gradually								
Pots & Containers (units)		Includes all pots & containers as defined above.								

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* these channels will not be counted in the "Total" figures for each category; there will be separate analysis available for these channels.

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Horticulture Australia

Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Greenlife

Data Input Instructions

1. complete the fields in light green and return to Informark by the **10th** calendar day after **Month** end.
2. to submit the completed form, upload this file to the secure GfK Sell-In website **https://www.informark.com.au/**, or fax to (02) 6162 9522.

Company:

Postcode:

Contact Name: (i.e. the person GfK Sell-In should contact if there are any queries with the data.)

Month:

Total Hours Worked: (i.e. estimate of total hours worked by all staff in the business this month, including temporary staff and owners. Note that if your company reports sales in either Allied Product and/or Greenlife then this figure will only be counted once. The aggregated industry figure will be used by NGI for lobbying purposes.)

Domestic Licence Fees Collected: (i.e. net Licence Fees received by your company from a Licensee in Australia for the rights to produce a licenced breed of plant, excluding marketing royalties and any share paid forward under a conjunction arrangement.)

International Licence Fees Collected: (i.e. net Licence Fees received by your company from a Licensee based overseas for the rights to produce a licenced breed of plant, excluding marketing royalties and any share paid forward under a conjunction arrangement.)

Sales **into** these channels:

Sales **of** these products:

			Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail		Export *
									Corporates	Independents & Other	
			Tubes and Plants sold to another business for potting (value add).	Plants sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Tubes sold for revegetation purposes. Includes Forestry.	Plants sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Plants sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Plants sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Plants sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).	Plants sold to another country.
Greenlife - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.											
Seeds & Bulbs		Includes all herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.).									
Propagation Plants		Includes plugs, tubestock, cuttings, rooted cuttings, rootstock and tissue culture.									
Edibles (excl. Seeds & Bulbs, Propagation Plants)		Herbs, vegetables, fruit trees & vines (seedlings, standard, advanced).									
Bedding Plants & Potted Colour (excl. Edibles)		Includes annuals etc (seedlings, standard, advanced).									
Indoor (excl. Edibles)		Includes flowering, foliage, hanging baskets, palms and ferns.									
Perennial / Trees & Shrubs (excl. Edibles)	Ground Dug Stock	Includes perennials, climbers, conifers, advanced trees, deciduous trees, exotics, natives, rose, ground covers and in-ground grown.									
	Advanced Stock (over 45L)										
	Potted Stock										

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GfK Sell-In Service

Nursery & Garden Industry Market Research
Growing Media

Data Input Instructions

1. Complete the fields in light green on each sheet. There is one sheet for exports, and a sheet for sales to each state. If there are no sales to a particular state please leave that sheet blank.
2. Submit the completed form to GfK Sell-In by the **10th** calendar day after **Month** end by uploading this file to the secure GfK Sell-In website **https://www.informark.com.au/**, or fax to (02) 6162 9522.

Company:		(i.e. your company's name.)
Location of Business:		(i.e. the postcode or state for your business. Employment analysis in reports is based on the state in which the business is located.)
Contact Name:		(i.e. the person GfK Sell-In should contact if there are any queries with the data.)
Month:		(i.e. the calendar month for which you are reporting sales e.g. January 2012.)
Total Hours Worked:		(i.e. estimate of total hours worked by all staff in the business this month, including temporary staff and owners. Note that if your company reports sales in either Allied Product and/or Greenlife then this figure will only be counted once. The aggregated industry figure will be used by NGI for lobbying purposes.)

Go to Sheet

- Exports
- NSW/ACT
- VIC
- QLD
- SA
- NT
- WA
- TAS

Note that company **confidential** data will not be disclosed to any third parties unless express written permission is given to do so.

This project is funded using the Nursery Industry Levy which is matched by the Australian Government through Horticulture Australia.

Horticulture Australia

Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research

Growing Media

Destination of Sales: **Exports**

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Sales **into** these channels:

Sales **of** these products:

		Export *
		Media sold to another country.
Growing Media - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.		
Bagged	Includes potting mix, mulch, peats and soil blends.	
Bulk	Includes compost, pine bark, potting media and mixes.	
Other	Includes coir, coconut fibre, perlite, vermiculite, water absorbers and wetting agents.	
Growing Media - Sales in volume terms (as m^3).		
Bagged	As defined above.	
Bulk	As defined above.	

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***** these channels will not be counted in the "Total" figures for each category; there will be separate analysis available for these channels.

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Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Growing Media

Destination of Sales: NSW/ACT

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Business to Business	Primary Industry	Revegetation	Government	Landscape	Retail	
								Corporates	Independents & Other
		Media sold to a Greenlife production business for propagation/potting.	Media sold to another business, other than tubes (value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Media sold for revegetation purposes. Includes Forestry.	Media sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Media sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Media sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Media sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Growing Media - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Bagged	Includes potting mix, mulch, peats and soil blends.								
Bulk	Includes compost, pine bark, potting media and mixes.								
Other	Includes coir, coconut fibre, perlite, vermiculite, water absorbers and wetting agents.								
Growing Media - Sales in volume terms (as m^3).									
Bagged	As defined above.								
Bulk	As defined above.								

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Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research

Growing Media

Destination of Sales: VIC

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Business to Business	Primary Industry	Revegetation	Government	Landscape	Retail: Corporates	Retail: Independents & Other
		Media sold to a Greenlife production business for propagation/potting.	Media sold to another business, other than tubes (value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Media sold for revegetation purposes. Includes Forestry.	Media sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Media sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Media sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Media sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Growing Media - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Bagged	Includes potting mix, mulch, peats and soil blends.								
Bulk	Includes compost, pine bark, potting media and mixes.								
Other	Includes coir, coconut fibre, perlite, vermiculite, water absorbers and wetting agents.								
Growing Media - Sales in volume terms (as m^3).									
Bagged	As defined above.								
Bulk	As defined above.								

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Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Growing Media

Destination of Sales: QLD

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Business to Business	Primary Industry	Revegetation	Government	Landscape	Retail	
								Corporates	Independents & Other
		Media sold to a Greenlife production business for propagation/potting.	Media sold to another business, other than tubes (value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Media sold for revegetation purposes. Includes Forestry.	Media sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Media sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Media sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Media sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Growing Media - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Bagged	Includes potting mix, mulch, peats and soil blends.								
Bulk	Includes compost, pine bark, potting media and mixes.								
Other	Includes coir, coconut fibre, perlite, vermiculite, water absorbers and wetting agents.								
Growing Media - Sales in volume terms (as m^3).									
Bagged	As defined above.								
Bulk	As defined above.								

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GfK Sell-In Service

Nursery & Garden Industry Market Research

Growing Media

Destination of Sales: SA

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Business to Business	Primary Industry	Revegetation	Government	Landscape	Retail	
								Corporates	Independents & Other
		Media sold to a Greenlife production business for propagation/potting.	Media sold to another business, other than tubes (value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Media sold for revegetation purposes. Includes Forestry.	Media sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Media sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Media sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Media sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Growing Media - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Bagged	Includes potting mix, mulch, peats and soil blends.								
Bulk	Includes compost, pine bark, potting media and mixes.								
Other	Includes coir, coconut fibre, perlite, vermiculite, water absorbers and wetting agents.								
Growing Media - Sales in volume terms (as m^3).									
Bagged	As defined above.								
Bulk	As defined above.								

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HAL Horticulture Australia

Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Growing Media

Destination of Sales: NT

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Business to Business	Primary Industry	Revegetation	Government	Landscape	Retail	
								Corporates	Independents & Other
		Media sold to a Greenlife production business for propagation/potting.	Media sold to another business, other than tubes (value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Media sold for revegetation purposes. Includes Forestry.	Media sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Media sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Media sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Media sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Growing Media - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Bagged	Includes potting mix, mulch, peats and soil blends.								
Bulk	Includes compost, pine bark, potting media and mixes.								
Other	Includes coir, coconut fibre, perlite, vermiculite, water absorbers and wetting agents.								
Growing Media - Sales in volume terms (as m^3).									
Bagged	As defined above.								
Bulk	As defined above.								

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Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Growing Media

Destination of Sales: WA

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Business to Business	Primary Industry	Revegetation	Government	Landscape	Retail	
								Corporates	Independents & Other
		Media sold to a Greenlife production business for propagation/potting.	Media sold to another business, other than tubes (value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Media sold for revegetation purposes. Includes Forestry.	Media sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Media sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Media sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Media sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Growing Media - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Bagged	Includes potting mix, mulch, peats and soil blends.								
Bulk	Includes compost, pine bark, potting media and mixes.								
Other	Includes coir, coconut fibre, perlite, vermiculite, water absorbers and wetting agents.								
Growing Media - Sales in volume terms (as m^3).									
Bagged	As defined above.								
Bulk	As defined above.								

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Nursery & Garden Industry

GfK Sell-In Service

Nursery & Garden Industry Market Research
Growing Media

Destination of Sales: **TAS**

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Sales **into** these channels:

Sales **of** these products:

		Greenlife Production	Business to Business	Primary Industry	Revegetation	Government	Landscape	Retail	
								Corporates	Independents & Other
		Media sold to a Greenlife production business for propagation/potting.	Media sold to another business, other than tubes (value add).	Plants sold for commercial food production, vegetable, fruit, cut flower etc.	Media sold for revegetation purposes. Includes Forestry.	Media sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Media sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Media sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Media sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).
Growing Media - Sales in Total Invoice Value terms, in whole $ excluding invoiced itemised GST and pot levy.									
Bagged	Includes potting mix, mulch, peats and soil blends.								
Bulk	Includes compost, pine bark, potting media and mixes.								
Other	Includes coir, coconut fibre, perlite, vermiculite, water absorbers and wetting agents.								
Growing Media - Sales in volume terms (as m^3).									
Bagged	As defined above.								
Bulk	As defined above.								

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Nursery & Garden Industry

Informark Sell-In Service

Nursery & Garden Industry Market Research

Greenlife National - June 2012 - The Greener Nursery Pty Ltd

Convert to PowerPoint

Print Sheets

Click on each link to go to that sheet

This is an index of all the pages within the report package. Click on the links on the left to go to that page. To return to this page, click on the "Home" link on the top right hand side of the report pages.

Contributors can only access Industry aggregated figures and their own figures, but no data from other contributors.

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife National
Data Input Record - June 2012
Produced: 24/07/2012

Company	Date Received	Company	Date Received
Company 1	dd/mm/yyyy	Company 51	dd/mm/yyyy
Company 2	dd/mm/yyyy	Company 52	dd/mm/yyyy
Company 3	dd/mm/yyyy	Company 53	dd/mm/yyyy
Company 4	dd/mm/yyyy	Company 54	dd/mm/yyyy
Company 5	dd/mm/yyyy	Company 55	dd/mm/yyyy
Company 6	dd/mm/yyyy	Company 56	dd/mm/yyyy
Company 7	dd/mm/yyyy	Company 57	dd/mm/yyyy
Company 8	dd/mm/yyyy	Company 58	dd/mm/yyyy
Company 9	dd/mm/yyyy	Company 59	dd/mm/yyyy
Company 10	dd/mm/yyyy	Company 60	dd/mm/yyyy
Company 11	dd/mm/yyyy	Company 61	dd/mm/yyyy
Company 12	dd/mm/yyyy	Company 62	dd/mm/yyyy
Company 13	dd/mm/yyyy	Company 63	dd/mm/yyyy
Company 14	dd/mm/yyyy	Company 64	dd/mm/yyyy
Company 15	dd/mm/yyyy	Company 65	dd/mm/yyyy
Company 16	dd/mm/yyyy	Company 66	dd/mm/yyyy
Company 17	dd/mm/yyyy	Company 67	dd/mm/yyyy
Company 18	dd/mm/yyyy	Company 68	dd/mm/yyyy
Company 19	dd/mm/yyyy	Company 69	dd/mm/yyyy
Company 20	dd/mm/yyyy	Company 70	dd/mm/yyyy
Company 21	dd/mm/yyyy	Company 71	dd/mm/yyyy
Company 22	dd/mm/yyyy	Company 72	dd/mm/yyyy
Company 23	dd/mm/yyyy	Company 73	dd/mm/yyyy
Company 24	dd/mm/yyyy	Company 74	dd/mm/yyyy
Company 25	dd/mm/yyyy	Company 75	dd/mm/yyyy
Company 26	dd/mm/yyyy	Company 76	dd/mm/yyyy
Company 27	dd/mm/yyyy	Company 77	dd/mm/yyyy
Company 28	dd/mm/yyyy	Company 78	dd/mm/yyyy
Company 29	dd/mm/yyyy	Company 79	dd/mm/yyyy
Company 30	dd/mm/yyyy	Company 80	dd/mm/yyyy
Company 31	dd/mm/yyyy	Company 81	dd/mm/yyyy
Company 32	dd/mm/yyyy	Company 82	dd/mm/yyyy
Company 33	dd/mm/yyyy	Company 83	dd/mm/yyyy
Company 34	dd/mm/yyyy	Company 84	dd/mm/yyyy
Company 35	dd/mm/yyyy	Company 85	dd/mm/yyyy
Company 36	dd/mm/yyyy	Company 86	dd/mm/yyyy
Company 37	dd/mm/yyyy	Company 87	dd/mm/yyyy
Company 38	dd/mm/yyyy	Company 88	dd/mm/yyyy
Company 39	dd/mm/yyyy	Company 89	dd/mm/yyyy
Company 40	dd/mm/yyyy	Company 90	dd/mm/yyyy
Company 41	dd/mm/yyyy	Company 91	dd/mm/yyyy
Company 42	dd/mm/yyyy	Company 92	dd/mm/yyyy
Company 43	dd/mm/yyyy	Company 93	dd/mm/yyyy
Company 44	dd/mm/yyyy	Company 94	dd/mm/yyyy
Company 45	dd/mm/yyyy	Company 95	dd/mm/yyyy
Company 46	dd/mm/yyyy	Company 96	dd/mm/yyyy
Company 47	dd/mm/yyyy	Company 97	dd/mm/yyyy
Company 48	dd/mm/yyyy	Company 98	dd/mm/yyyy
Company 49	dd/mm/yyyy	Company 99	dd/mm/yyyy
Company 50	dd/mm/yyyy	Company 100	dd/mm/yyyy

This report is to provide transparency of which businesses have contributed data to the Greenlife National report, and the date the data was received by Informark.

In the live report, the name of each Business that has contributed data will be listed on this page.

Informark Sell-In Service

Nursery & Garden Industry Market Research

Demonstration Only - Contains Sample Data

Greenlife National

Company Snapshot - Current Month

Produced: 24/07/2012

This report shows your percentage share of the total market in each category and channel you contribute data to, for the latest month. Use this report to identify areas of strength, and opportunities for further growth for your

Total of each category

The Brokerage and Export Channels are not counted in the "Total" figures for each category.

Lists the product categories reported on

Explains what data is displayed, and the timeframe

Own Company Market Shares by Channel - June 2012

			Greenlife Production	Primary Industry	Revegetation	Government	Landscape	Retail			Total	Brokerage / Resale	Export
								Corporates	Independents & Other	Total			
	Greenlife National - Based on Value ($)												
15	Seeds & Bulbs							5.0%		2.5%	10.0%	12.0%	3.0%
16	Propagation Plants												
17	Edibles (Excl. Seeds & Bulbs, Propagation Plants)												
18	Bedding Plants and Potted Colour (Excl. Edibles)												
19	Indoor (Excl. Edibles)												
20	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	75.0%	10.0%	5.0%	25.0%	100.0%				80.0%		
21		Advanced Stock (over 45L)	28.0%		3.0%	30.0%	100.0%				70.0%		
22		Potted Stock	32.0%	8.0%	1.0%	15.0%					25.0%		
23		Total	40.0%	6.0%	6.0%	22.0%	75.0%				60.0%		
24	Total		70.0%	1.0%	0.1%	9.0%	50.0%	0.2%		0.1%	30.0%	2.0%	0.4%

Total of each channel

This report shows your growth in each category and channel you contribute data to, comparing this month with the same month last year. Use this report to track how your business is performing, and flag underperforming

Own Company Growth by Channel - June 2012 on June 2011

			Greenlife Production	Primary Industry	Revegetation	Government	Landscape	Retail			Total	Brokerage / Resale	Export
								Corporates	Independents & Other	Total			
	Greenlife National - Based on Value ($)												
35	Seeds & Bulbs							0.1%	0.1%	0.1%	3.0%	3.0%	7.0%
36	Propagation Plants												
37	Edibles (Excl. Seeds & Bulbs, Propagation Plants)												
38	Bedding Plants and Potted Colour (Excl. Edibles)												
39	Indoor (Excl. Edibles)												
40	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	15.0%	2.0%	-0.1%	5.0%	20.0%				16.0%		
41		Advanced Stock (over 45L)	10.0%		-1.5%	10.2%	60.0%				17.1%		
42		Potted Stock	8.0%	0.1%	-2.7%	9.3%					10.4%		
43		Total	10.0%	1.0%	-1.2%	8.2%	30.0%				16.5%		
44	Total		14.0%	0.1%	-1.0%	1.8%	10.0%	0.1%	0.1%	0.1%	6.0%	1.0%	3.4%

Informark Sell-In Service

Nursery & Garden Industry Market Research

Greenlife National

Company Snapshot - Current Month

Demonstration Only - Contains Sample Data

Produced: 24/07/2012

Lists the product categories reported on

Explains what data is displayed, and the timeframe

This report shows your percentage share of the total market in each state you contribute data to, for the latest month. Use this report to identify areas of strength, and opportunities for further growth for your business.

Total of each category

Own Company Market Shares by State - June 2012

	Greenlife National - Based on Value ($)		NSW & ACT	VIC	QLD	SA	NT	WA	TAS	**Total**
15	Seeds & Bulbs							5.0%	**2.5%**	**10.0%**
16	Propagation Plants									
17	Edibles (Excl. Seeds & Bulbs, Propagation Plants)									
18	Bedding Plants and Potted Colour (Excl. Edibles)									
19	Indoor (Excl. Edibles)									
20	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	75.0%	10.0%	5.0%	25.0%	100.0%			**80.0%**
21		Advanced Stock (over 45L)	28.0%		3.0%	30.0%	100.0%			**70.0%**
22		Potted Stock	32.0%	8.0%	1.0%	15.0%				**25.0%**
23		**Total**	**40.0%**	**6.0%**	**6.0%**	**22.0%**	**75.0%**			**60.0%**
24	**Total**		**70.0%**	**1.0%**	**0.1%**	**9.0%**	**50.0%**	**0.2%**	**0.1%**	**30.0%**

Total of each channel

This report shows your growth in each state you contribute data to, comparing this month with the same month last year. Use this report to track how your business is performing, and flag underperforming categories.

Own Company Growth by State - June 2012 on June 2011

	Greenlife National - Based on Value ($)		NSW & ACT	VIC	QLD	SA	NT	WA	TAS	**Total**
35	Seeds & Bulbs							0.1%	**0.1%**	**3.0%**
36	Propagation Plants									
37	Edibles (Excl. Seeds & Bulbs, Propagation Plants)									
38	Bedding Plants and Potted Colour (Excl. Edibles)									
39	Indoor (Excl. Edibles)									
40	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	15.0%	2.0%	-0.1%	5.0%	20.0%			**16.0%**
41		Advanced Stock (over 45L)	10.0%		-1.5%	10.2%	60.0%			**17.1%**
42		Potted Stock	8.0%	0.1%	-2.7%	9.3%				**10.4%**
43		**Total**	**10.0%**	**1.0%**	**-1.2%**	**8.2%**	**30.0%**			**16.5%**
44	**Total**		**14.0%**	**0.1%**	**-1.0%**	**1.8%**	**10.0%**	**0.1%**	**0.1%**	**6.0%**

Informark Sell-In Service

Nursery & Garden Industry Market Research Demonstration Only - Contains Sample Data

Greenlife National

Company Snapshot - Financial YTD

Produced: 24/07/2012

This report shows your percentage share of the total market in each category and channel you contribute data to, for the Financial year to date. Use this report to identify areas of strength, and opportunities for further growth for your business.

Lists the product categories reported on

Explains what data is displayed, and the timeframe

Total of each category

The Brokerage and Export Channels are not counted in the "Total" figures for each category.

Own Company Market Shares by Channel - July 2011 to June 2012

			Greenlife Production	Primary Industry	Revegetation	Government	Landscape	Retail: Corporates	Retail: Independents & Other	Retail: **Total**	**Total**	Brokerage / Resale	Export
	Greenlife National - Based on Value ($)												
15	Seeds & Bulbs							5.0%		**2.5%**	**10.0%**	11.5%	1.9%
16	Propagation Plants												
17	Edibles (Excl. Seeds & Bulbs, Propagation Plants)												
18	Bedding Plants and Potted Colour (Excl. Edibles)												
19	Indoor (Excl. Edibles)												
20	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	70.0%	8.2%	4.9%	22.5%	75.0%				**79.4%**		
21		Advanced Stock (over 45L)	22.0%		2.8%	18.7%	60.0%				**69.5%**		
22		Potted Stock	30.0%	7.4%	1.1%	14.9%					**24.3%**		
23		**Total**	**37.4%**	**4.4%**	**5.9%**	**21.6%**	**50.0%**				**55.9%**		
24	**Total**		**64.8%**	**1.2%**	**0.2%**	**8.9%**	**63.2%**	**0.2%**		**0.1%**	**28.4%**	**1.9%**	**0.3%**

Total of each channel

This report shows your growth in each category and channel you contribute data to, comparing this Financial year to date with the same period last year. Use this report to track how your business is performing, and flag underperforming categories.

Own Company Growth by Channel - July 2011 to June 2012 on July 2010 to June 2011

			Greenlife Production	Primary Industry	Revegetation	Government	Landscape	Retail: Corporates	Retail: Independents & Other	Retail: **Total**	**Total**	Brokerage / Resale	Export
	Greenlife National - Based on Value ($)												
35	Seeds & Bulbs							5.0%		**2.5%**	**3.0%**	3.0%	2.5%
36	Propagation Plants												
37	Edibles (Excl. Seeds & Bulbs, Propagation Plants)												
38	Bedding Plants and Potted Colour (Excl. Edibles)												
39	Indoor (Excl. Edibles)												
40	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	20.0%	2.9%	-0.3%	5.0%	5.7%				**16.0%**		
41		Advanced Stock (over 45L)	15.0%		-1.2%	10.2%	6.8%				**17.1%**		
42		Potted Stock	10.2%	2.1%	-1.9%	9.3%					**10.4%**		
43		**Total**	**12.5%**	**2.4%**	**-1.8%**	**8.2%**	**10.2%**				**16.5%**		
44	**Total**		**14.9%**	**2.4%**	**-1.9%**	**1.8%**	**9.4%**	**0.2%**		**0.1%**	**6.0%**	**0.1%**	**0.1%**

Informark Sell-In Service

Nursery & Garden Industry Market Research

Greenlife National

Company Snapshot - Financial YTD

Demonstration Only - Contains Sample Data

Produced: 24/07/2012

Lists the product categories reported on

Explains what data is displayed, and the timeframe

This report shows your percentage share of the total market in each state you contribute data to, for the Financial year to date. Use this report to identify areas of strength, and opportunities for further growth for your business.

Total of each category

			Own Company Market Shares by State - July 2011 to June 2012							
			NSW & ACT	VIC	QLD	SA	NT	WA	TAS	**Total**
Greenlife National - Based on Value ($)										
15	Seeds & Bulbs							5.0%	**2.5%**	**10.0%**
16	Propagation Plants									
17	Edibles (Excl. Seeds & Bulbs, Propagation Plants)									
18	Bedding Plants and Potted Colour (Excl. Edibles)									
19	Indoor (Excl. Edibles)									
20	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	75.0%	10.0%	5.0%	25.0%	100.0%			**80.0%**
21		Advanced Stock (over 45L)	28.0%		3.0%	30.0%	100.0%			**70.0%**
22		Potted Stock	32.0%	8.0%	1.0%	15.0%				**25.0%**
23		**Total**	**40.0%**	**6.0%**	**6.0%**	**22.0%**	**75.0%**			**60.0%**
24	**Total**		**70.0%**	**1.0%**	**0.1%**	**9.0%**	**50.0%**	**0.2%**	**0.1%**	**30.0%**

Total of each channel

This report shows your growth in each state you contribute data to, comparing this Financial year to date with the same period last year. Use this report to track how your business is performing, and flag underperforming categories.

			Own Company Growth by State - July 2011 to June 2012 on July 2010 to June 2011							
			NSW & ACT	VIC	QLD	SA	NT	WA	TAS	**Total**
Greenlife National - Based on Value ($)										
35	Seeds & Bulbs							0.1%	**0.1%**	**3.0%**
36	Propagation Plants									
37	Edibles (Excl. Seeds & Bulbs, Propagation Plants)									
38	Bedding Plants and Potted Colour (Excl. Edibles)									
39	Indoor (Excl. Edibles)									
40	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	15.0%	2.0%	-0.1%	5.0%	20.0%			**16.0%**
41		Advanced Stock (over 45L)	10.0%		-1.5%	10.2%	60.0%			**17.1%**
42		Potted Stock	8.0%	0.1%	-2.7%	9.3%				**10.4%**
43		**Total**	**10.0%**	**1.0%**	**-1.2%**	**8.2%**	**30.0%**			**16.5%**
44	**Total**		**14.0%**	**0.1%**	**-1.0%**	**1.8%**	**10.0%**	**0.1%**	**0.1%**	**6.0%**

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife National

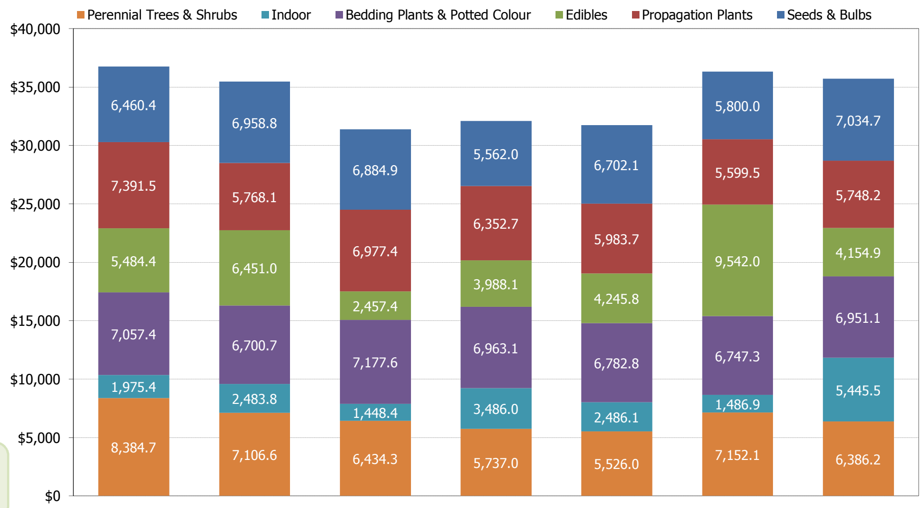
Demonstration Only - Contains Sample Data

State Analysis

Produced: 24/07/2012

This chart shows the size of each state within the Greenlife market, and how much each category makes up of the states, for the latest month. Note that these are aggregated Industry figures, not individual contributor figures. Use this chart to gain a better understanding of state size, and know where the sales of each category are going. Note that the Brokerage and Exports channels are not included in these figures.

Industry - June 2012 - Value ($000)



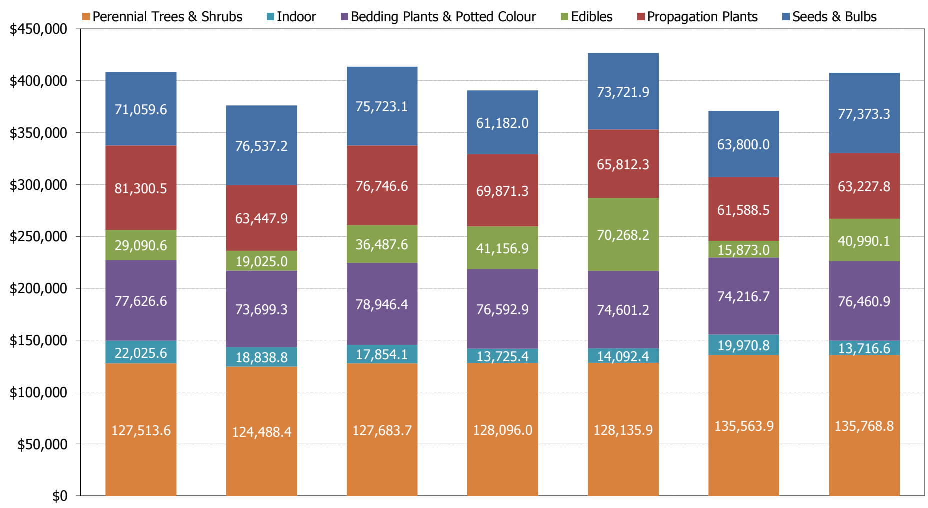
Product Categories

State

	NSW & ACT	VIC	QLD	SA	NT	WA	TAS	Total
Seeds & Bulbs	6,460.4	6,958.8	6,884.9	5,562.0	6,702.1	5,800.0	7,034.7	**45,402.9**
Propagation Plants	7,391.5	5,768.1	6,977.4	6,352.7	5,983.7	5,599.5	5,748.2	**43,821.1**
Edibles	5,484.4	6,451.0	2,457.4	3,988.1	4,245.8	9,542.0	4,154.9	**36,323.6**
Bedding Plants & Potted Colour	7,057.4	6,700.7	7,177.6	6,963.1	6,782.8	6,747.3	6,951.1	**48,380.0**
Indoor	1,975.4	2,483.8	1,448.4	3,486.0	2,486.1	1,486.9	5,445.5	**18,812.1**
Perennial Trees & Shrubs	8,384.7	7,106.6	6,434.3	5,737.0	5,526.0	7,152.1	6,386.2	**46,726.9**
Total	**36,753.8**	**35,469.0**	**31,380.0**	**32,088.9**	**31,726.5**	**36,327.8**	**35,720.6**	**239,466.6**

This chart is the same as above, but for the Financial year to date.

Industry - July 2011 to June 2012 - Value ($000)

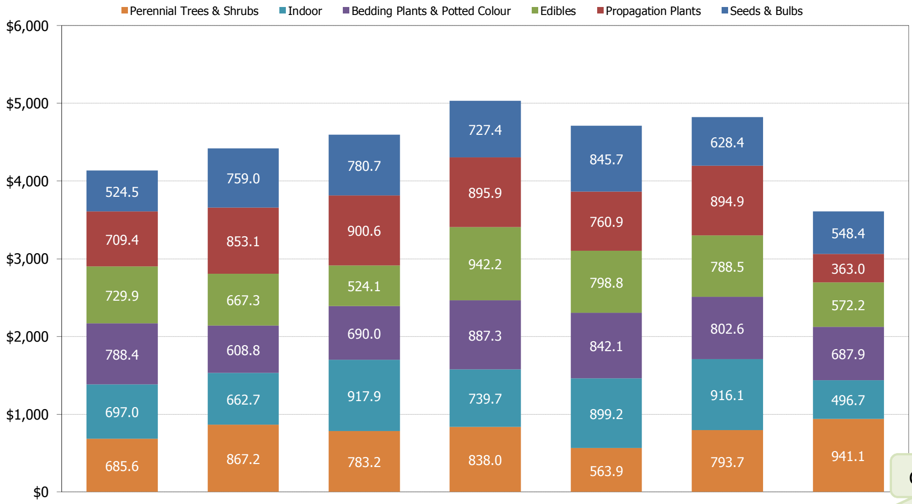


	NSW & ACT	VIC	QLD	SA	NT	WA	TAS	Total
Seeds & Bulbs	71,059.6	76,537.2	75,723.1	61,182.0	73,721.9	63,800.0	77,373.3	**499,397.1**
Propagation Plants	81,300.5	63,447.9	76,746.6	69,871.3	65,812.3	61,588.5	63,227.8	**481,994.9**
Edibles	29,090.6	19,025.0	36,487.6	41,156.9	70,268.2	15,873.0	40,990.1	**252,891.4**
Bedding Plants & Potted Colour	77,626.6	73,699.3	78,946.4	76,592.9	74,601.2	74,216.7	76,460.9	**532,144.0**
Indoor	22,025.6	18,838.8	17,854.1	13,725.4	14,092.4	19,970.8	13,716.6	**120,223.7**
Perennial Trees & Shrubs	127,513.6	124,488.4	127,683.7	128,096.0	128,135.9	135,563.9	135,768.8	**907,250.3**
Total	**408,616.5**	**376,036.6**	**413,441.5**	**390,624.5**	**426,631.9**	**371,012.9**	**407,537.5**	**2,793,901.4**

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife National **Demonstration Only - Contains Sample Data**
Channel Analysis
Produced: 24/07/2012

This chart shows the size of each channel within the Greenlife market, and how much each category makes up of the channels, for the latest month. Note that these are aggregated Industry figures, not individual contributor figures. Use this chart to gain a better understanding of channel size, and know where the sales of each category are going, showing potential areas of growth for your business. Note that the Brokerage and Exports channels are not included in these charts.

Industry - June 2012 - Value ($000)



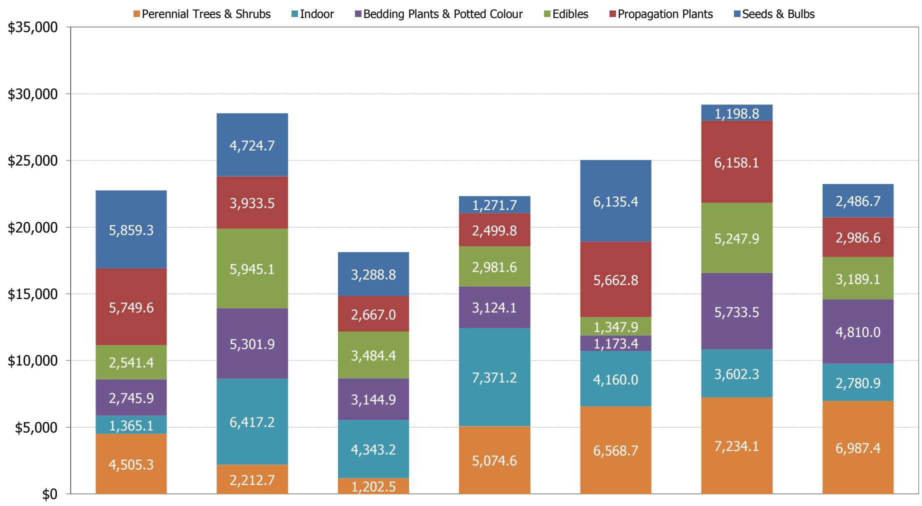
Product Categories

Channels

	Greenlife Production	Primary Industry	Revegetation	Government	Landscape	Corporates Retail	Independents & Other Retail	Total
Seeds & Bulbs	524.5	759.0	780.7	727.4	845.7	628.4	548.4	**4,814.1**
Propagation Plants	709.4	853.1	900.6	895.9	760.9	894.9	363.0	**5,377.8**
Edibles	729.9	667.3	524.1	942.2	798.8	788.5	572.2	**5,023.0**
Bedding Plants & Potted Colour	788.4	608.8	690.0	887.3	842.1	802.6	687.9	**5,307.1**
Indoor	697.0	662.7	917.9	739.7	899.2	916.1	496.7	**5,329.3**
Perennial Trees & Shrubs	685.6	867.2	783.2	838.0	563.9	793.7	941.1	**5,472.7**
Total	**4,134.8**	**4,418.1**	**4,596.5**	**5,030.5**	**4,710.6**	**4,824.2**	**3,609.3**	**31,324.0**

This chart is the same as above, but for the Financial year to date.

Industry - July 2011 to June 2012 - Value ($000)



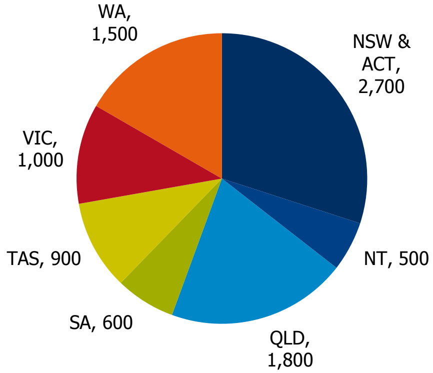
	Greenlife Production	Primary Industry	Revegetation	Government	Landscape	Corporates Retail	Independents & Other Retail	Total
Seeds & Bulbs	5,859.3	4,724.7	3,288.8	1,271.7	6,135.4	1,198.8	2,486.7	**24,965.4**
Propagation Plants	5,749.6	3,933.5	2,667.0	2,499.8	5,662.8	6,158.1	2,986.6	**29,657.4**
Edibles	2,541.4	5,945.1	3,484.4	2,981.6	1,347.9	5,247.9	3,189.1	**24,737.4**
Bedding Plants & Potted Colour	2,745.9	5,301.9	3,144.9	3,124.1	1,173.4	5,733.5	4,810.0	**26,033.7**
Indoor	1,365.1	6,417.2	4,343.2	7,371.2	4,160.0	3,602.3	2,780.9	**30,039.9**
Perennial Trees & Shrubs	4,505.3	2,212.7	1,202.5	5,074.6	6,568.7	7,234.1	6,987.4	**33,785.3**
Total	**22,766.6**	**28,535.1**	**18,130.8**	**22,323.0**	**25,048.2**	**29,174.7**	**23,240.7**	**169,219.1**

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife National
Employment Analysis
Produced: 24/07/2012

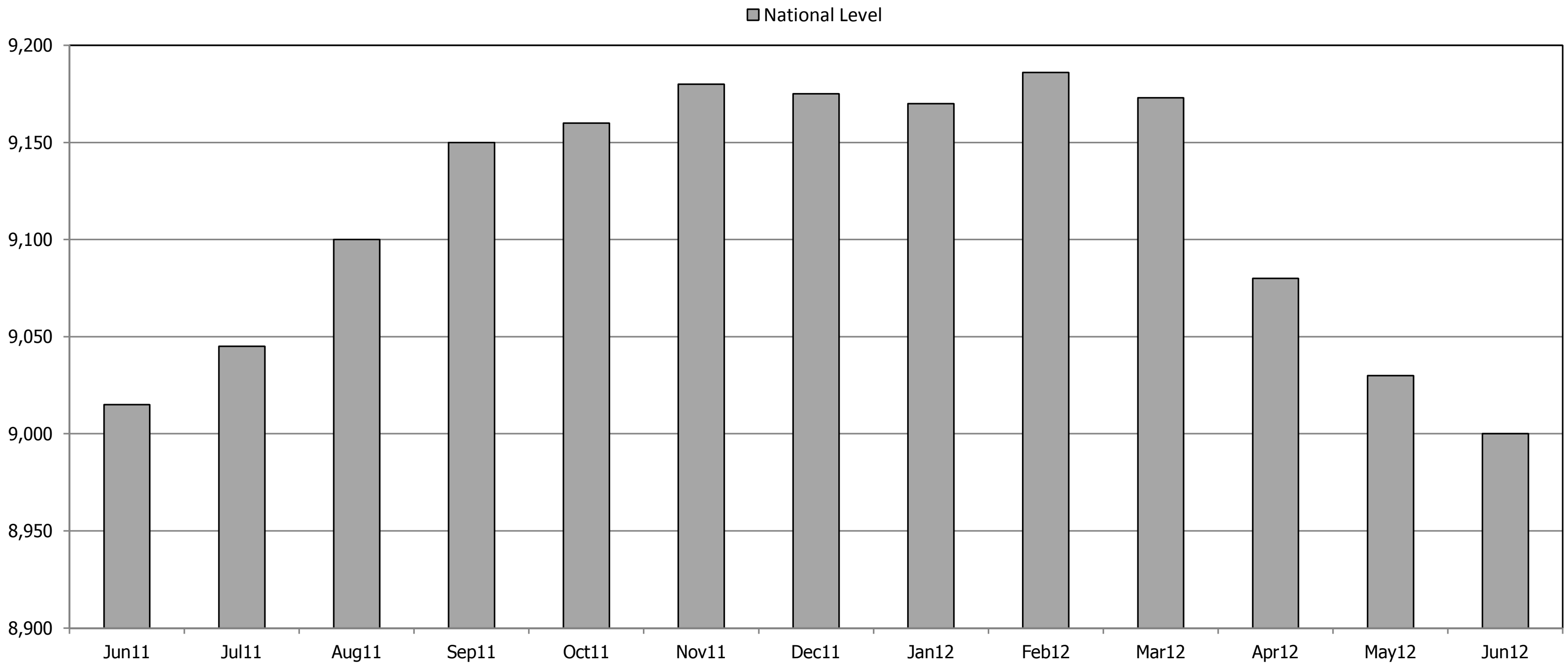
Demonstration Only - Contains Sample Data

Explains what data is displayed

		Number of Full-Time (Equivalent) Staff Employed - June 2012							
		NSW & ACT	NT	QLD	SA	TAS	VIC	WA	**National**
Greenlife National									
13	June 2012	2,700	500	1,800	600	900	1,000	1,500	**9,000**
14	Growth on 2011	6.5%	0.4%	1.1%	-6.3%	-5.5%	2.2%	0.1%	**1.4%**



Full Time (Equivalent) Staff levels for the last 13 months



National Level	9,120	8,971	9,156	9,131	9,144	9,150	9,103	9,100	9,086	9,073	9,050	9,028	9,000

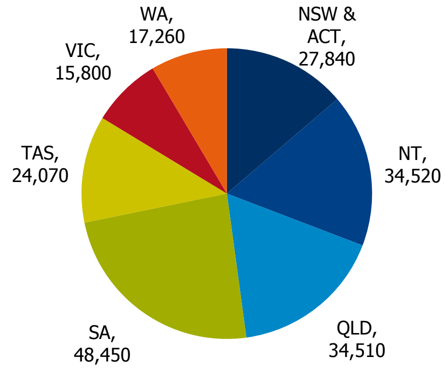
Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife National
Licence Fees Analysis

Produced: 24/07/2012

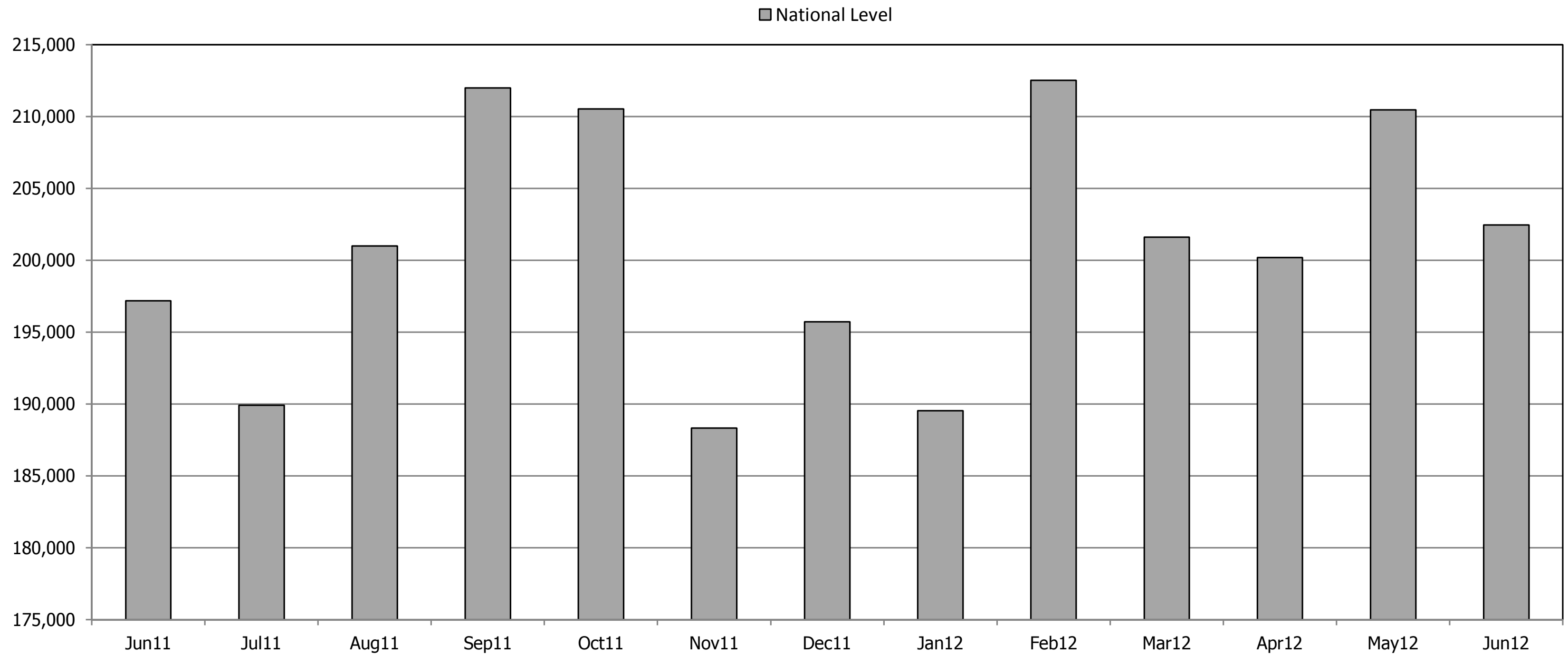
Demonstration Only - Contains Sample Data

Explains what data is displayed

		Licence Fees ($) - June 2012							
		NSW & ACT	NT	QLD	SA	TAS	VIC	WA	**National**
Greenlife National									
13	June 2012	27,840	34,520	34,510	48,450	24,070	15,800	17,260	**202,450**
14	Growth on 2011	6.5%	0.4%	1.1%	-6.3%	-5.5%	2.2%	0.1%	**1.4%**



Licence Fees levels for the last 13 months ($)



	Jun11	Jul11	Aug11	Sep11	Oct11	Nov11	Dec11	Jan12	Feb12	Mar12	Apr12	May12	Jun12
National Level	197,179	189,905	200,999	211,986	210,533	188,321	195,720	189,522	212,528	201,603	200,199	210,462	202,450

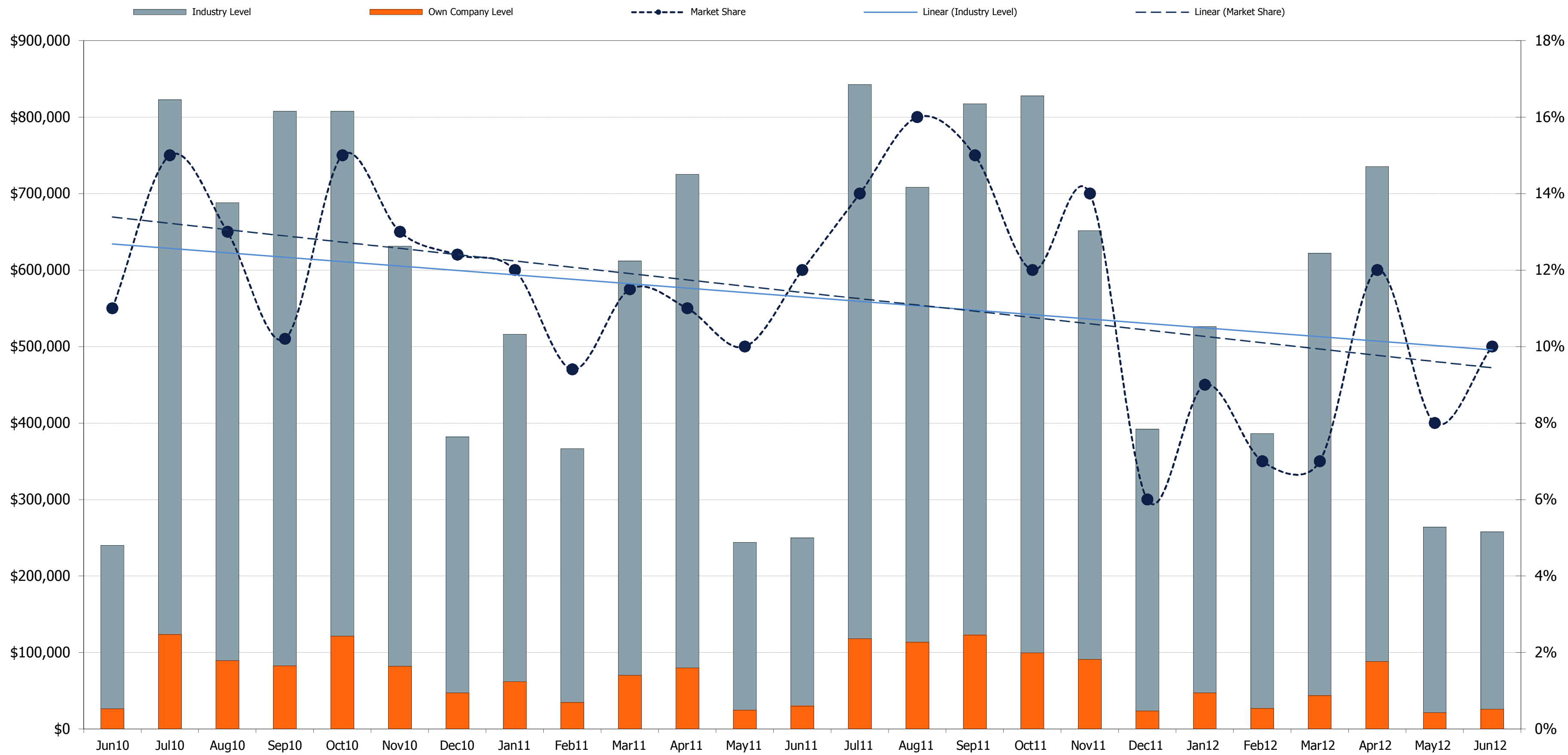
Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife National
Market Share Trend Analysis - Seeds & Bulbs

Produced: 24/07/2012

Demonstration Only - Contains Sample Data

This chart shows the sales for Seeds & Bulbs in Australia, both the aggregated Industry figures and your own company sales. Also displayed is your share of the market, as well as how your business and the industry is trending over 25 months. Use this information to track performance over time, and get an idea of where the market is heading. This highlights any potential problems, or shifts in the market. Seasonality can also be analysed, so you can plan for the future.

Sales by Value ($000)



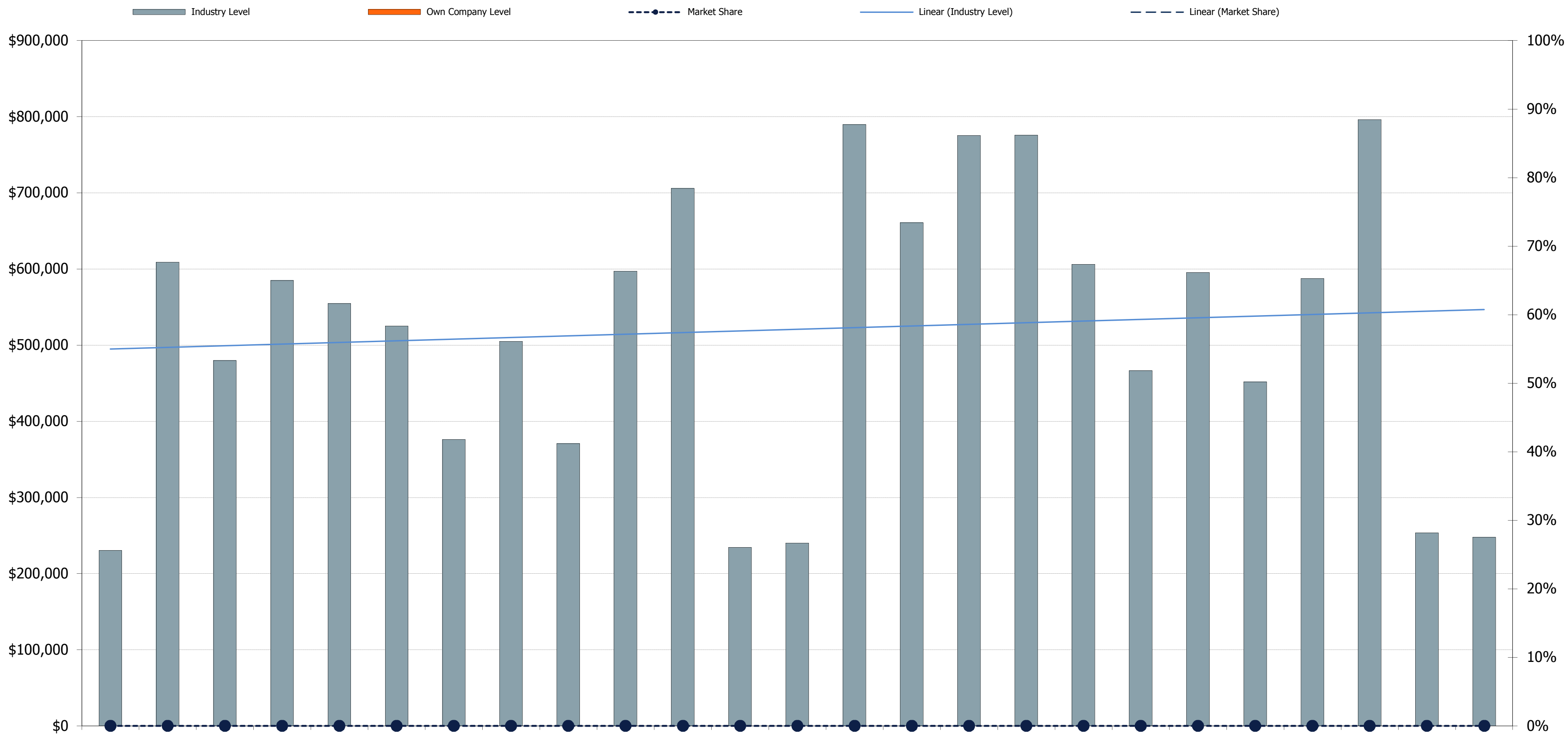
	Jun10	Jul10	Aug10	Sep10	Oct10	Nov10	Dec10	Jan11	Feb11	Mar11	Apr11	May11	Jun11	Jul11	Aug11	Sep11	Oct11	Nov11	Dec11	Jan12	Feb12	Mar12	Apr12	May12	Jun12
Industry Level (value)	240,000	822,705	688,306	807,538	807,777	631,330	381,866	516,081	366,291	611,899	725,297	243,945	250,000	842,705	708,306	817,538	827,777	651,330	391,866	526,081	386,291	621,899	735,297	263,945	257,893
Own Company Level (value)	26,400	123,406	89,480	82,369	121,167	82,073	47,351	61,930	34,431	70,368	79,783	24,395	30,000	117,979	113,329	122,631	99,333	91,186	23,512	47,347	27,040	43,533	88,236	21,116	25,789
Market Share	11.0%	15.0%	13.0%	10.2%	15.0%	13.0%	12.4%	12.0%	9.4%	11.5%	11.0%	10.0%	12.0%	14.0%	16.0%	15.0%	12.0%	14.0%	6.0%	9.0%	7.0%	7.0%	12.0%	8.0%	10.0%

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife National
Market Share Trend Analysis - Propagation Plants
Produced: 24/07/2012

Demonstration Only - Contains Sample Data

This chart shows the sales for Propagation Plants in Australia, both the aggregated Industry figures and your own company sales. Also displayed is your share of the market, as well as how your business and the industry is trending over 25 months. Note that if you don't have sales in this category, you will still receive this chart, so you can keep track of all categories in the market as a whole. Use this information to track Industry performance over time, and get an idea of where the market is

Sales by Value ($000)



	Jun10	Jul10	Aug10	Sep10	Oct10	Nov10	Dec10	Jan11	Feb11	Mar11	Apr11	May11	Jun11	Jul11	Aug11	Sep11	Oct11	Nov11	Dec11	Jan12	Feb12	Mar12	Apr12	May12	Jun12
Industry Level (value)	230,400	608,997	479,974	584,836	554,666	525,277	376,191	505,038	370,839	597,023	705,885	234,187	240,000	789,797	660,774	775,236	775,466	606,077	466,591	595,438	451,639	587,423	796,285	253,387	247,577
Own Company Level (value)																									
Market Share	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Informark Sell-In Service

Nursery & Garden Industry Market Research

Demonstration Only - Contains Sample Data

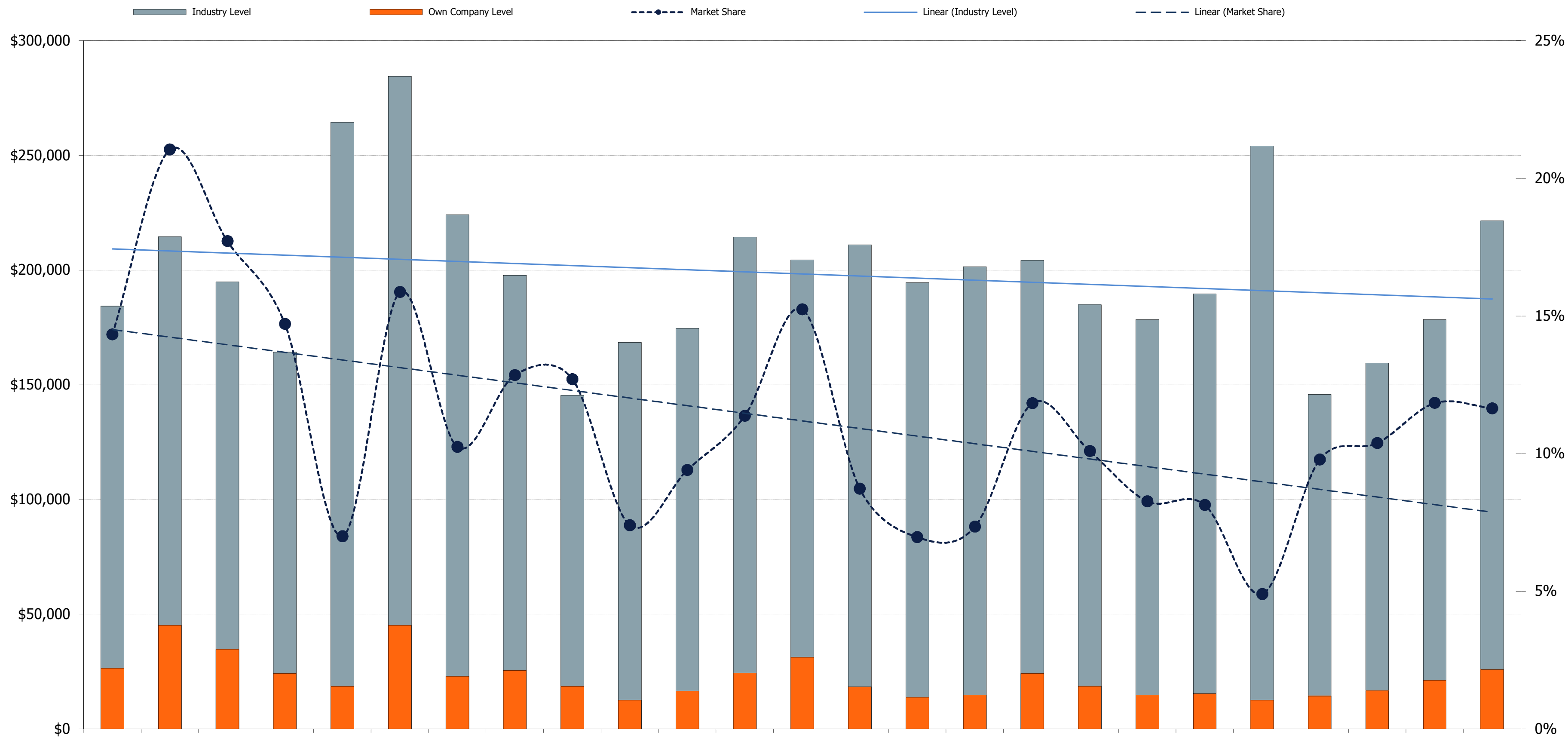
Greenlife National

Market Share Trend Analysis - Edibles (Excl. Seeds & Bulbs, Propagation Plants)

Produced: 24/07/2012

This chart shows the sales for Edibles in Australia, both the aggregated Industry figures and your own company sales. Also displayed is your share of the market, as well as how your business and the industry is trending over 25 months. Use this information to track performance over time, and get an idea of where the market is heading. This highlights any potential problems, or shifts in the market. Seasonality can also be analysed, so you can plan for the future.

Sales by Value ($000)



	Jun10	Jul10	Aug10	Sep10	Oct10	Nov10	Dec10	Jan11	Feb11	Mar11	Apr11	May11	Jun11	Jul11	Aug11	Sep11	Oct11	Nov11	Dec11	Jan12	Feb12	Mar12	Apr12	May12	Jun12
Industry Level (value)	184,246	214,516	194,842	164,245	264,451	284,514	224,154	197,741	145,241	168,451	174,514	214,456	204,419	211,054	194,512	201,454	204,154	184,842	178,424	189,642	254,141	145,741	159,451	178,411	221,454
Own Company Level (value)	26,400	45,145	34,514	24,156	18,486	45,141	22,956	25,415	18,452	12,458	16,415	24,395	31,154	18,412	13,547	14,785	24,154	18,645	14,745	15,424	12,451	14,254	16,547	21,116	25,789
Market Share	14.3%	21.0%	17.7%	14.7%	7.0%	15.9%	10.2%	12.9%	12.7%	7.4%	9.4%	11.4%	15.2%	8.7%	7.0%	7.3%	11.8%	10.1%	8.3%	8.1%	4.9%	9.8%	10.4%	11.8%	11.6%

Informark Sell-In Service

Nursery & Garden Industry Market Research

Demonstration Only - Contains Sample Data

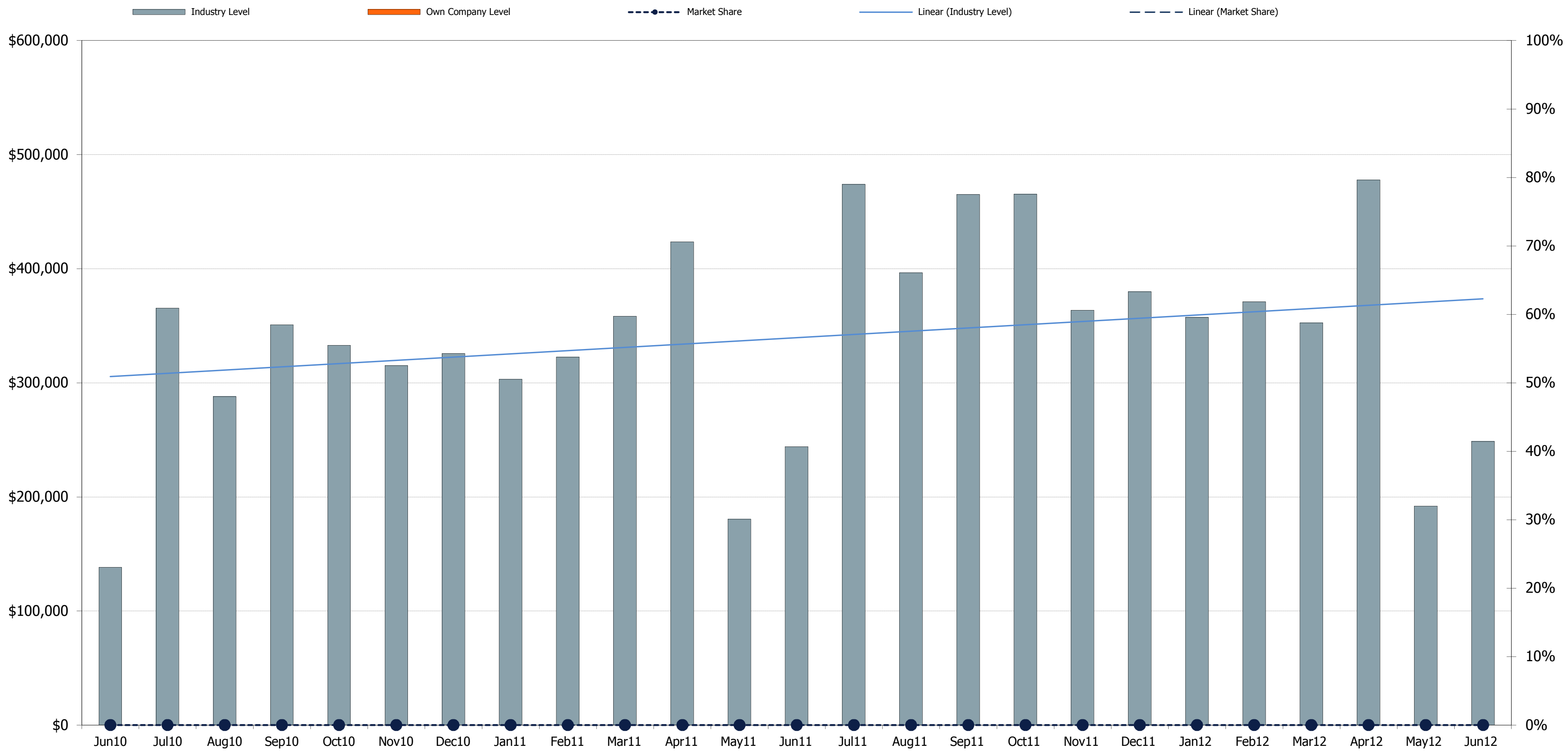
Greenlife National

Market Share Trend Analysis - Bedding Plants & Potted Colour (Excl. Edibles)

Produced: 24/07/2012

This chart shows the sales for Bedding Plants in Australia, both the aggregated Industry figures and your own company sales. Also displayed is your share of the market, as well as how your business and the industry is trending over 25 months. Note that if you don't have sales in this category, you will still receive this chart, so you can keep track of all categories in the market as a whole. Use this information to track Industry performance over time, and get an idea of

Sales by Value ($000)



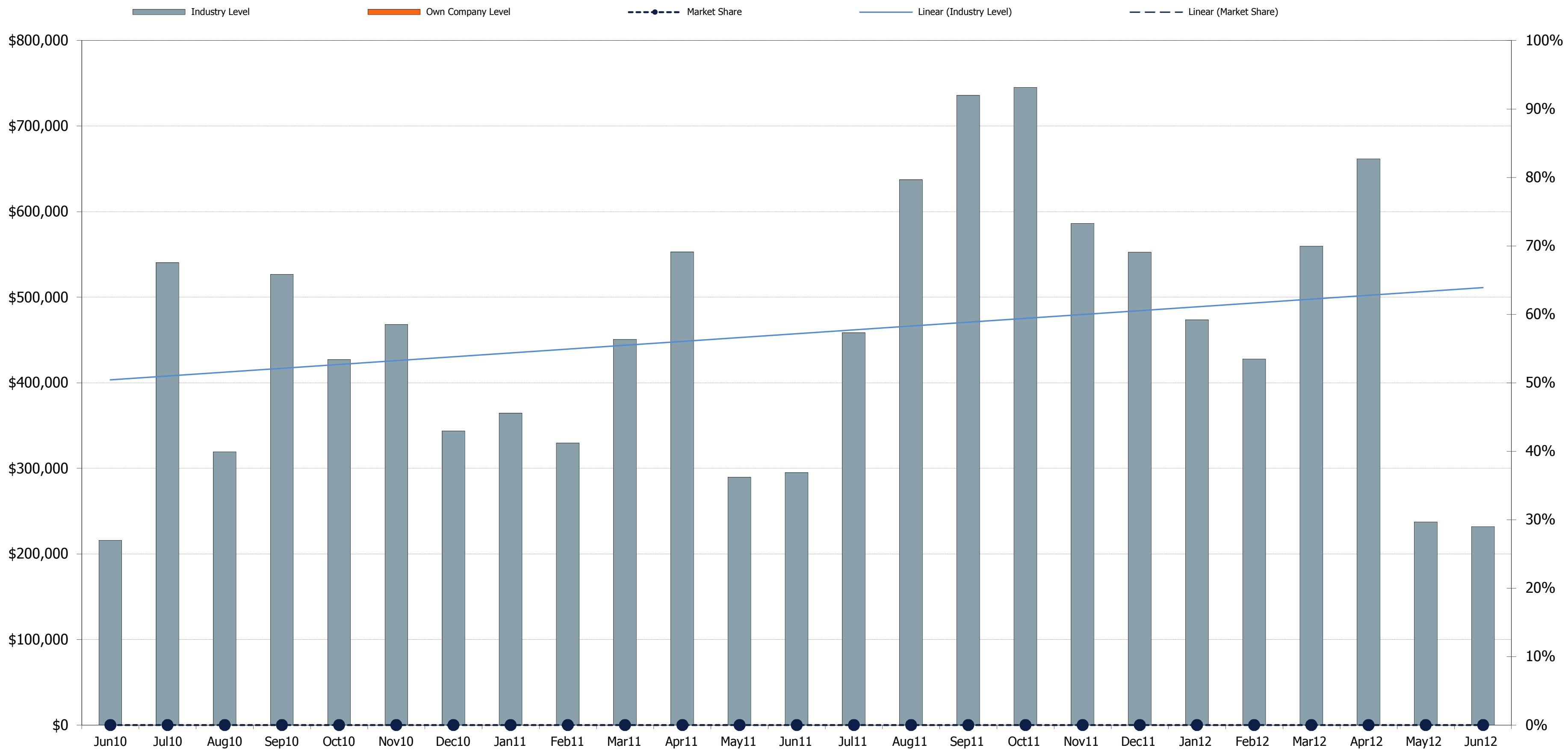
	Jun10	Jul10	Aug10	Sep10	Oct10	Nov10	Dec10	Jan11	Feb11	Mar11	Apr11	May11	Jun11	Jul11	Aug11	Sep11	Oct11	Nov11	Dec11	Jan12	Feb12	Mar12	Apr12	May12	Jun12
Industry Level (value)	138,240	365,398	287,984	350,902	332,800	315,166	325,715	303,023	322,504	358,214	423,531	180,512	244,000	473,878	396,464	465,142	465,280	363,646	379,955	357,263	370,984	352,454	477,771	192,032	248,546
Own Company Level (value)																									
Market Share	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife National
Market Share Trend Analysis - Indoor (Excl. Edibles)
Produced: 24/07/2012

Demonstration Only - Contains Sample Data

This chart shows the sales for Indoor Plants in Australia, both the aggregated Industry figures and your own company sales. Also displayed is your share of the market, as well as how your business and the industry is trending over 25 months. Note that if you don't have sales in this category, you will still receive this chart, so you can keep track of all categories in the market as a whole. Use this information to track Industry performance over time, and get an idea of

Sales by Value ($000)



Industry Level (value)	216,000	540,435	319,475	526,784	426,999	468,197	343,679	364,473	329,662	450,709	552,767	289,551	295,000	458,435	637,475	735,784	744,999	586,197	552,679	473,473	427,662	559,709	661,767	237,551	232,104
Own Company Level (value)																									
Market Share	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Informark Sell-In Service

Nursery & Garden Industry Market Research

Demonstration Only - Contains Sample Data

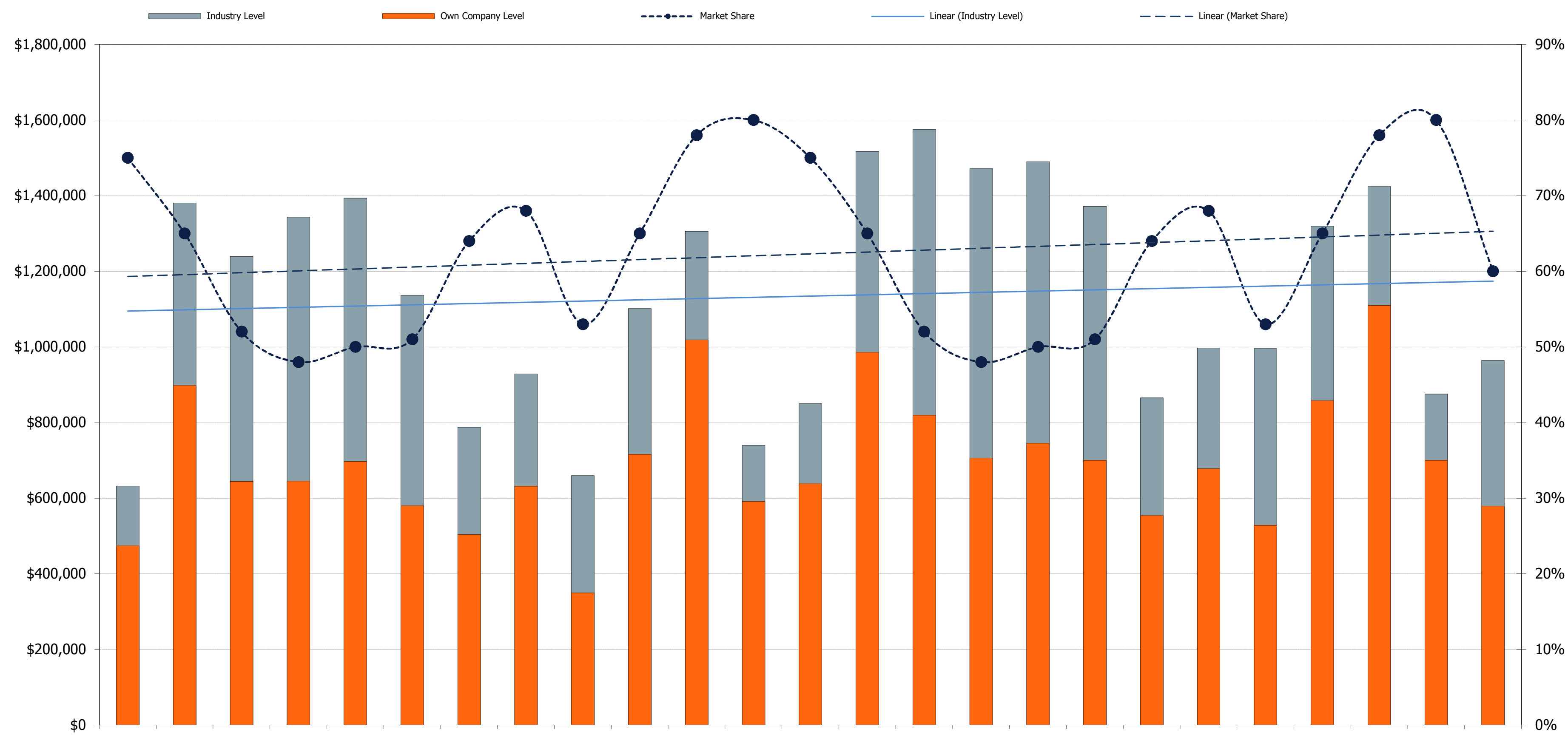
Greenlife National

Market Share Trend Analysis - Perennial / Trees & Shrubs (Excl. Edibles)

Produced: 24/07/2012

This chart shows the sales for Perennial/Trees & Shrubs in Australia, both the aggregated Industry figures and your own company sales. Also displayed is your share of the market, as well as how your business and the industry is trending over 25 months. Use this information to track performance over time, and get an idea of where the market is heading. This highlights any potential problems, or shifts in the market. Seasonality can also be analysed, so you can plan for the future.

Sales by Value ($000)



	Jun10	Jul10	Aug10	Sep10	Oct10	Nov10	Dec10	Jan11	Feb11	Mar11	Apr11	May11	Jun11	Jul11	Aug11	Sep11	Oct11	Nov11	Dec11	Jan12	Feb12	Mar12	Apr12	May12	Jun12
Industry Level (value)	632,000	#####	#####	#####	#####	#####	787,359	928,946	659,324	#####	#####	739,101	850,000	#####	#####	#####	#####	#####	865,359	996,946	995,324	#####	#####	875,101	964,207
Own Company Level (value)	474,000	897,565	644,254	644,913	696,999	579,561	503,910	631,683	349,442	715,922	#####	591,281	637,500	985,965	818,974	706,353	744,999	699,921	553,830	677,923	527,522	857,622	#####	700,081	578,524
Market Share	75.0%	65.0%	52.0%	48.0%	50.0%	51.0%	64.0%	68.0%	53.0%	65.0%	78.0%	80.0%	75.0%	65.0%	52.0%	48.0%	50.0%	51.0%	64.0%	68.0%	53.0%	65.0%	78.0%	80.0%	60.0%

NGOZ Snap Shot Survey
Basic Design and Question Details

Page 1 Welcome Page

You have been invited to participate in a short survey for the Nursery & Garden Industry Australia, which is facilitated by GfK Sell-In (Informark).
Your responses are anonymous. No individual business data will be identified. Your responses will be collated into total industry figures, which are critical for your industry (State and National bodies) to influence policy and target funding, particularly given the **election scheduled for this year**.

The survey should take less than 5 minutes to complete. You will need:
* your sales figures for the last 3 financial years (excluding GST)
* the average number of staff employed within your business during each of those finanacial years.
* total hectares under production (if applicable)

GfK Sell-In (Informark) will know which businesses have completed the survey, but your data is treated as confidential, will be stored securely and will not be disclosed to any parties outside of GfK Sell-In (Informark). Email addresses that are provided will be used to manage the distribution of the summary report which is offered at the conclusion of the survey.

If your business operates out of multiple sites, you will need to complete a separate survey form for each site. If you did not receive a separate email for each site you operate from, please contact GfK Sell-In (Informark) and we will provide you with a link to a separate survey form for that site.

Only participants in the survey will have access to a copy of the summary report.

Reviewing your own survey reponse alongside the summary report will allow you to determine benchmarks for your business compared to the rest of the industry. You can use this information in your business planning activities.

Question	**Do you wish to continue?**	**Yes**	Check if the survey has been completed before and advise
		No	Exit survey

Colour Key for internal use

Blue	Question to be asked
Light blue	Definition of question or response
Green	Response options
Grey	Internal notes regarding survey design

Page 2 Survey

Question number	Question	Field Type	Options	Definition of Response	Internal notes
1	**Please Enter Your Business Type** The category your business most closely fits in to. Please contact GfK Sell-In if you are unsure of your business type. If you do not fit into one of the following categories, please notify GfK Sell-In.	List of options, with ability to select one option	**Greenlife Producer**	You grow tubes or plants, and sell them to another business. Purchasers of your product could include production nurseries, government, landscapers, retailers etc	Offer question 2
			Greenlife Broker/Resaler	You onsell plants without adding value but apply a mark up. Identifying resellers and brokers allows us to more accurately measure the industry by not counting plant values more than once	Offer question 2
			Allied Supplier	You import or manufacture allied garden product for sale into the supply chain	Offer question 2
			Growing Media Supplier	You import or manufacture growing media product for sale into the supply chain	Offer question 2
			Retailer	You source plants, allied garden product or growing media from producers or brokers, and on-sells to the general public, with no change in product but mark up applied	Offer question 2
2	**Please Enter Your Postcode** Postcode of where business is located, for state and regional analysis.	Number field to enter postcode. Will validate against current postcodes.		Greenlife Producer	Offer question 3
				Greenlife Broker/Resaler	Offer question 4
				Allied Supplier	Offer question 4
				Growing Media Supplier	Offer question 3
				Retailer	Offer question 4

3	**Please enter your current total area under production** Actual area under production, not total operation site, to the nearest hectare (Ha) Understanding the area under production will give us a foundation for calcuating industry's total contribution to carbon reduction and will assist in calculating the collective future turnover of the industry for the coming year. Collecting this information for 3 years will help us to understand if the area used has expanded or contracted in recent years.	provide multiple site options based on answer to Q2 above	July 2010 to June 2011	July 2011 to June 2012	July 2012 to June 2013	Greenlife Producer Growing Media Supplier	Offer question 4 Offer question 4
4	**Please Enter your turnover for the last 3 financial years** Total of sales in Total Invoice Value terms, in whole Australian $, excluding invoiced itemised GST. The collective information provided here will allow us to see the trends in greenlife and support product popularity and give an accurate figure for the industry's worth each year.	Number fields, one per year.	July 2010 to June 2011	July 2011 to June 2012	July 2012 to June 2013	Greenlife Producer Greenlife Broker/Resaler Allied Supplier Growing Media Supplier Retailer	Offer question 5 Offer question 5 Offer question 5 Offer question 5 Offer question 5
5	**Please enter the average annual Full Time Equivelent staff numbers for each financial year** Actual staff, not hours; the average number of staff employed in your business for the relevant financial year, including owners/managers. The collective information provided here will allow us to influence funding and policy in relation to education and training, succession planning, etc. Combined with area under production, we will better understand staff ratios compared to business size and turnover.	Number fields, one per year.	July 2010 to June 2011	July 2011 to June 2012	July 2012 to June 2013	Greenlife Producer Greenlife Broker/Resaler Allied Supplier Growing Media Supplier Retailer	Offer to submit Offer to submit Offer to submit Offer to submit Offer to submit

That is the end of the survey. Please review your responses, before selecting Submit Responses below.

Submit Responses

☑ I would like a copy of the industry results emailed to me

Page 3 **Thank and end survey**

Thank you for participating in the Nursery and Garden Industry snap shot survey.

Close Window

PRINT your responses for your own records

Australian Bureau of Statistics

Rural Environment and Agriculture Statistics

Indicative Quote – Nursery & Garden Industry Australia

Nurseries and Related Industry Census

February 2014

Rachel Watchorn

Indicative Quote – Nursery & Garden Industry Australia

Table of Contents

1. Summary

1.1. This indicative costing has been prepared following provision of initial information requirements by the Nursery & Garden Industry Australia.

1.2. The quote is based upon the above information for a nursery and related industry census, commencing as a stand-alone collection.

1.3. The quote is current as at 18 February 2014.

2. Quote Parameters

2.1. The quote includes the client's information request for a Nursery and related industry census.

Questions/content requested by the client to be included in the nursery and related industry census collection instruments will be as per the survey instrument from 1997 and include:

- Number of production and wholesale establishments with sales of nursery material and nursery sales by activity:
    - establishments involved in production and wholesaling of plant materials;
    - plant material grown or grown on for resale; and
    - plant material purchased and onsold.
- Area of land used for nursery growing and growing on:
    - shadehouses;

  - greenhouses; and
  - open space.
- Sales and percentage of sales from production and wholesale nurseries made to various market sectors:
  - other nurseries for growing on;
  - retailers (chain stores, garden centres, other retail stores);
  - direct sales to home gardeners;
  - wholesale markets and cash and carry operations;
  - landscapers/plantscapers;
  - re-vegetation projects/farmers/Greening Australia; and
  - production horticulture.
- Percentage sales and number of production nurseries by type of plant material produced by production nurseries:
  - pots less than 76mm, pots 76mm-300mm;
  - pots greater than 300mm and large plants in bags;
  - in ground/bare rooted;
  - seeds;
  - bulbs; and
  - other plant material.
- Current and capital expenditure and percentage sales by production dominated nurseries:
  - capital (land/dwellings/other structures, plant machinery and equipment, intanginble assets); and
  - current (pots, labels, packaging materials, inward freight and cartage, water, heating, marketing and promotion, potting media, fertilisers, plant production chemicals, other inputs).
- Average number, average size and wage costs for production dominated nurseries by number employed:
  - number by establishment; and
  - average number of employees.
- Estimated percentage of time spent on activities in production dominated nurseries:
  - administration;
  - marketing;

  - o production (plant material, cut flowers, cultivated turf); and
  - o wholesaling, retailing, hiring of plants.
- Production and wholesale establishments with sales of cut flower and turf:
  - o number of establishments and sales (cut flowers and foliage, artificial flowers and plants, cultivate turf).
- Area of land used for cut flower and turf growing and growing on:
  - o cut flowers; and
  - o turf.
- Percentage sales of plant materials by production nurseries by sales destination:
  - o within the state;
  - o interstate; and
  - o overseas.
- Percentage sales of Australian and exotic ornamental plants:
  - o Australian natives; and
  - o other;

2.2. The collection will be despatched at a time appropriate to the reference period and suitable for the ABS undertake the collection activity.

2.3. Outputs for the above questions will be provided for the ANZSIC's outlined (see below) at the national and state level provided they meet the quality and confidentiality requirements of the ABS.

Agriculture, forestry and fishing

Nursery and floriculture production

1110	Fruit tree nursery operation (under cover)
1110	Ornamental plant growing (under cover)
1110	Seedling growing nec* (under cover)
1110	Vine stock nursery operation (under cover)
1120	Fruit tree nursery operation (outdoors)
1120	Ornamental plant growing (outdoors)
1120	Seedling growing nec* (outdoors)
1120	Vine stock nursery operation (outdoors)
1130	Turf Growing
1140	Flower Growing (under cover)

1140	Seeds, flower, growing (undercover)
1150	Flower growing (outdoors)
1150	Seeds, flower, growing (outdoors)
510	Forest nursery operations and services

Wholesale Trade

Agricultural product wholesaling

33190	Landscaping supplies - wholesaling
33190	Nursery stock - wholesale
33190	Seed wholesaling – farm or garden
33190	Trees or shrubs, potted – wholesaling

Garden and Flower Retailing

4232	Garden Supplies Retailing
4274	Flower Retailing

2.4. Outputs will be provided to the client within twelve months of the end of the reference period.

2.5. Costs for undertaking the work are approximately $1,012,054 (including GST). Costs subsequent to the 1st iteration will include an approximate 4% per annum indexation.

3. Caveats

3.1. This indicative quote has been prepared based on the initial information provided by Nursery and Garden Industry Australia, these details have been documented in section 2 above.

3.2. This quote does not give rise to any contractual obligation.

3.3. Any changes to the complexity of the output requirements, including the inclusion of additional questions, may alter the quote.

3.4. The outputs included in this quote are for the requested information outlined in section 2 only. Indicative quotes can be provided for additional outputs.

3.5. To proceed with this consultancy the client needs to provide the ABS with email confirmation to indicate interest in proceeding with this consultancy; this will be taken as informal approval after which the ABS will issue the final quote and the contract.

Australian Bureau of Statistics

Rural Environment and Agriculture Statistics

Indicative Quote – Nursery & Garden Industry Australia

Nursery Industry (Only) Census

February 2014

Rachel Watchorn

Indicative Quote – Nursery & Garden Industry Australia

Table of Contents

1. Summary

1.1. This indicative costing has been prepared following provision of initial information requirements by the Nursery & Garden Industry Australia.

1.2. The quote is based upon the above information for a nursery industry (only) census, commencing as a stand-alone collection.

1.3. The quote is current as at 18 February 2014.

2. Quote Parameters

2.1. The quote includes the client's information request for a nursery industry (only) Collection.

Questions/content requested by the client to be included in the nursery industry (only) census collection instruments will be:

- Land use:
    - total area of holding; and
    - main use of this land.
- Area grown, turnover ($) and total quantity of:
    - seeds and bulbs;
    - propagation plants;
    - edibles;
    - bedding plants/potted colour; and
    - indoor plants, perennials/trees and shrubs.

- Volume (m3) and cost ($) of growing media mixes;
- Quantity and Cost ($) of plastic containers;
- Hours worked and total wages paid in the business for each quarter;
- Area fertilised, amount of fertiliser and cost ($) for:
  - controlled release fertiliser;
  - other manufactured fertiliser; and
  - animal manure.
- Amount (kwh) and Cost ($) of non-renewable and renewable energy;
- Area of native vegetation (ha);
- Area of native vegetation protected (ha);
- Area of holding revegetated with native vegetation (ha);
- Length of river or creek frontage (km);
- Activities undertaken and area undertaken on to protect river or creek beds:
  - planted and/or seeded native vegetation;
  - managed weeds;
  - managed pests and/or feral animals; and
  - retained existing native vegetation.
- Ground cover target percentage;
- Use of water for agricultural production;
- Sources of water used for agricultural production:
  - water taken from irrigation channels;
  - water taken from on-farm dams or tanks;
  - water taken from rivers, creeks and lakes;
  - groundwater;
  - recycled/re-use water from off-farm sources; and
  - town or country reticulated mains supply.
- Water used for agricultural Production:
  - nurseries; and
  - other agricultural water.
- Irrigation expenditure dollars ($) and volume (ML) for:
  - purchases of extra water on a temporary basis;
  - purchases of extra water on a permanent basis; and
  - annual irrigation water volumetric/usage charges.

- Farmer demographics:
  - owner/operator, manager or other;
  - age;
  - years involved in managing the holding;
  - years involved in farming the region; and
  - membership of Landcare.
- Participation in projects/received funding from:
  - Caring for our Country;
  - Non-government groups;
  - Community Action Grants;
  - FarmReady;
  - CCAP Professional Advice or Training Grant;
  - Professional Advice Planning Grant; and
  - State Government funded projects.
- Benefits of involvement in these programs:
  - gained new skills or information;
  - on-ground works were implemented on the farm;
  - improved community interaction/networks;
  - other; and
  - no benefit.
- Sources of information or advice used for making decisions on your property:
  - regional NRM organisations;
  - other local and/or state government;
  - Landcare;
  - farm journals and agricultural media;
  - internet;
  - industry groups (Industry development officers, extension programs);
  - agri-business, accountants or rural financial counsellors;
  - private agronomists; and
  - other farmers.

2.2. The collection will be despatched at a time appropriate to the reference period and suitable for the ABS undertake the collection activity.

2.3. Outputs for the above questions will be provided for the ANZSIC's outlined (see below) at the national and state level provided they meet the quality and confidentiality requirements of the Australian Bureau of Statistics.

Agriculture, forestry and fishing
Nursery and floriculture production

01110	Fruit tree nursery operation (under cover)
01110	Ornamental plant growing (under cover)
01110	Seedling growing nec* (under cover)
01110	Vine stock nursery operation (under cover)
01120	Fruit tree nursery operation (outdoors)
01120	Ornamental plant growing (outdoors)
01120	Seedling growing nec* (outdoors)
01120	Vine stock nursery operation (outdoors)

Wholesale Trade
Agricultural product wholesaling

33190	Landscaping supplies - wholesaling
33190	Nursery stock - wholesale
33190	Seed wholesaling – farm or garden
33190	Trees or shrubs, potted – wholesaling

2.4. Outputs will be provided to the client within twelve months of the end of the reference period.

2.5. Costs for undertaking the work are approximately $825,669 (including GST). Costs subsequent to the 1st iteration will include an approximate 4% per annum indexation.

3. Caveats

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3.2. This quote does not give rise to any contractual obligation.

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NGIA Nursery Snapshot Survey - 1001

Content

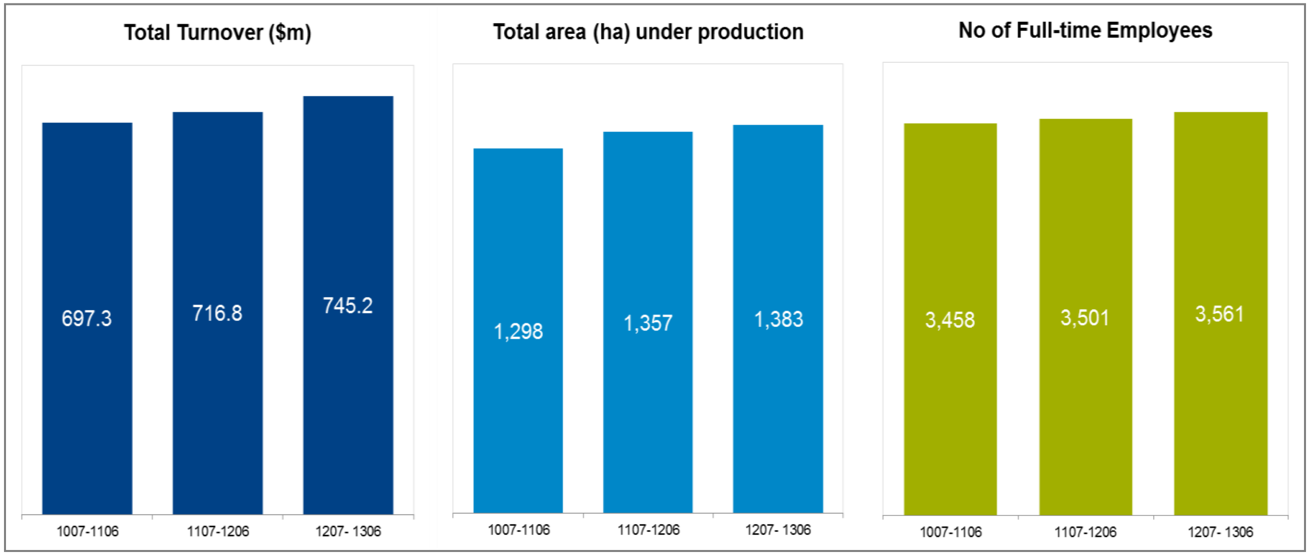
Total AU Summary

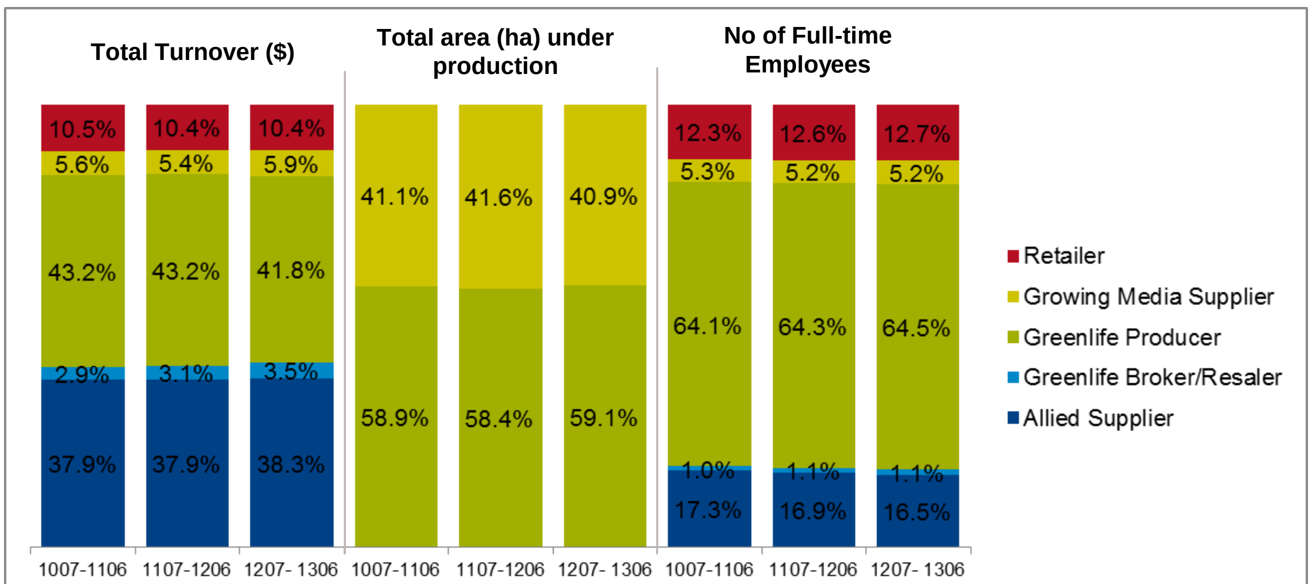
Results by Sector

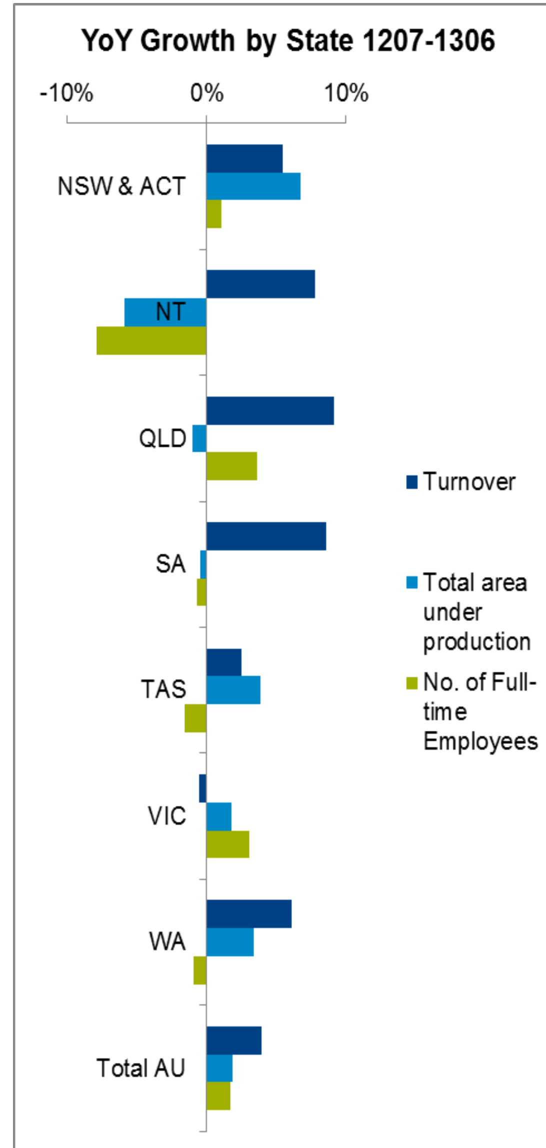
- Allied Supplier
- Greenlife Broker/Resaler
- Greenlife Producer
- Growing Media Supplier
- Retailer

Total AU Summary

Total AU Summary
(No of respondents 289)







Avg. Total Turnover ($)/FTE

	1007-1106	1107-1206	1107-1206 YoY	1207-1306	1207-1306 YoY
Allied Supplier	$440,462	$459,805	4.4%	$485,659	5.6%
Greenlife Broker/Resaler	$574,966	$580,926	1.0%	$677,759	16.7%
Greenlife Producer	$135,891	$137,667	1.3%	$135,727	-1.4%
Growing Media Supplier	$213,065	$214,575	0.7%	$237,923	10.9%
Retailer	$171,997	$169,057	-1.7%	$171,601	1.5%

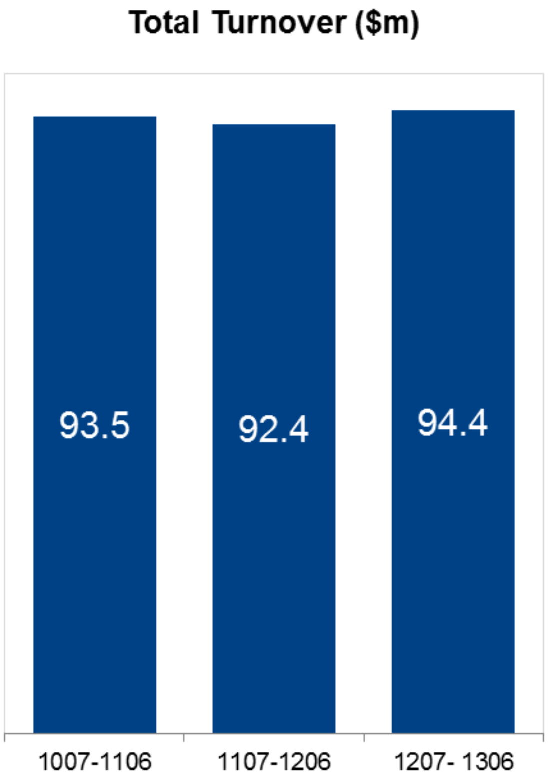
Avg. turnover/area (ha)

	1007-1106	1107-1206	1107-1206 YoY	1207-1306	1207-1306 YoY
Greenlife Producer	$394,349	$390,754	0.7%	$381,749	12.4%
Growing Media Supplier	$72,618	$69,267	1.5%	$77,584	4.5%

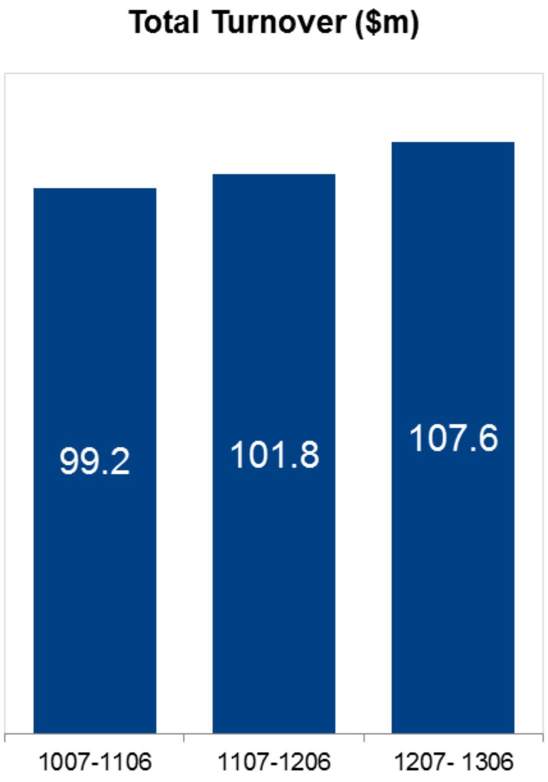
Allied Supplier

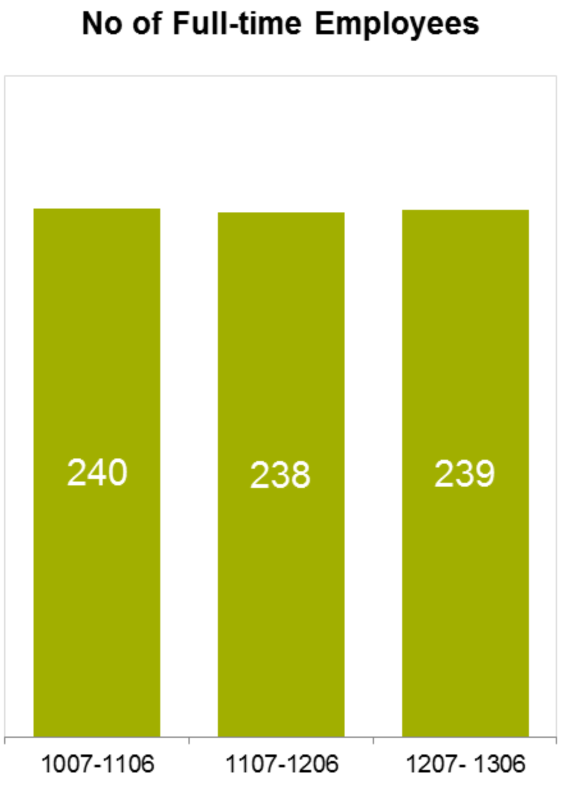
Allied Supplier NSW/ACT

(No of respondents 7)

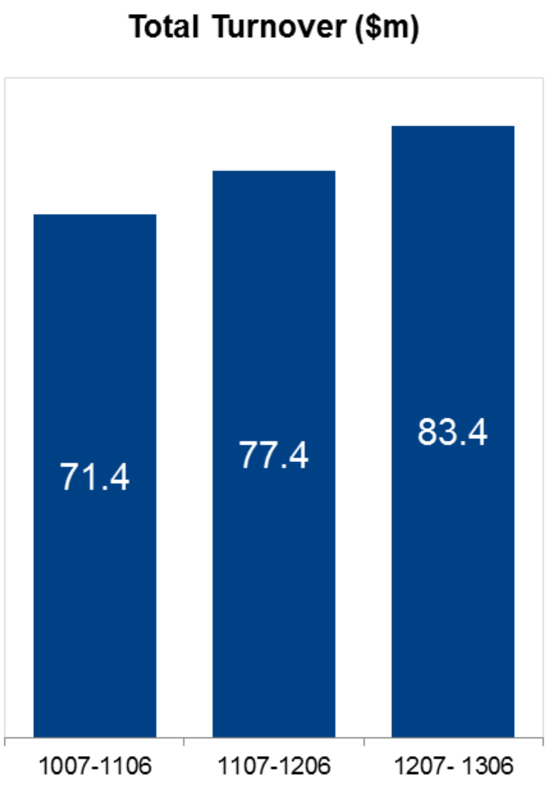


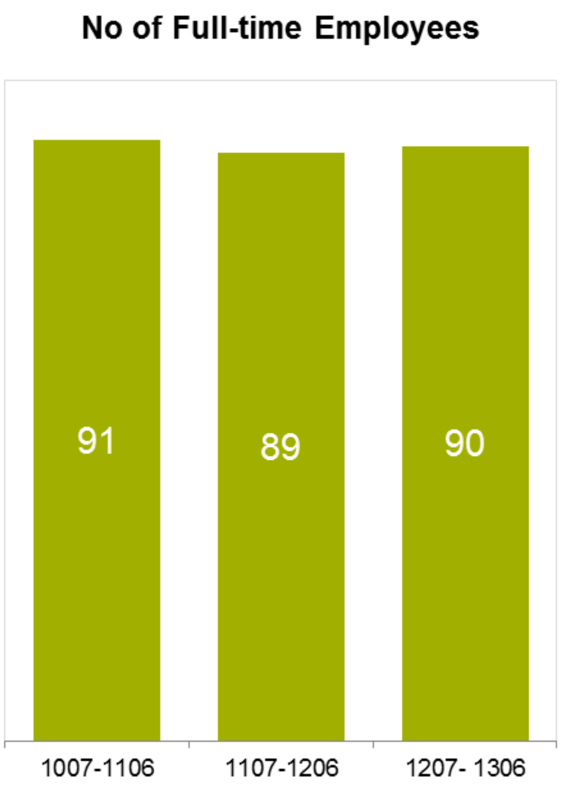
Allied Supplier VIC
(No of respondents 9)





Allied Supplier All Other (NT / QLD / SA / TAS / WA)
(No of respondents 9)

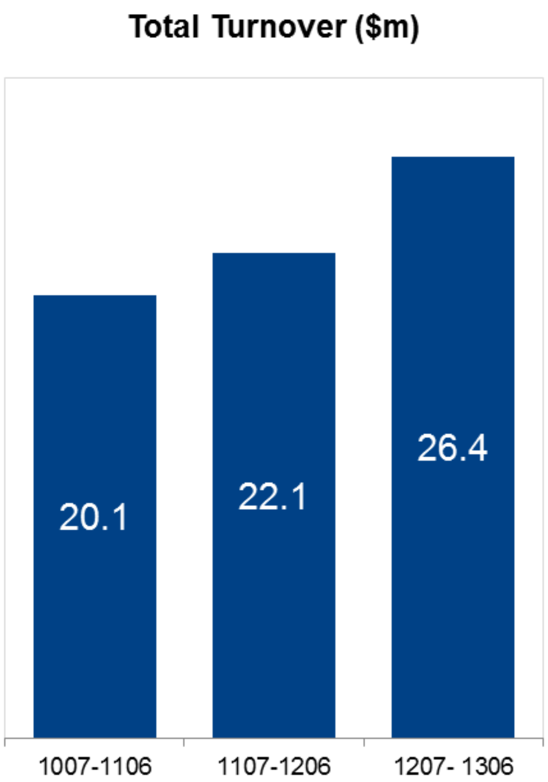


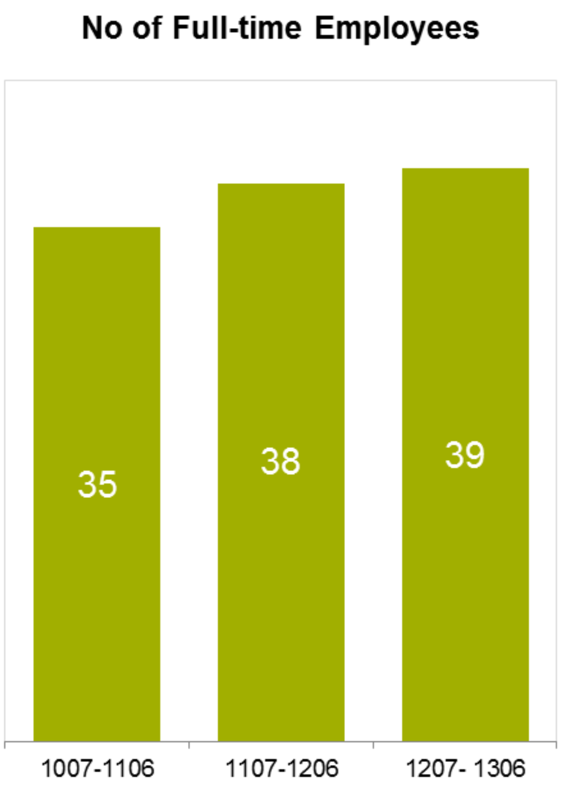


Greenlife Broker/Resaler

Greenlife Broker/Resaler National

(No of respondents 6)

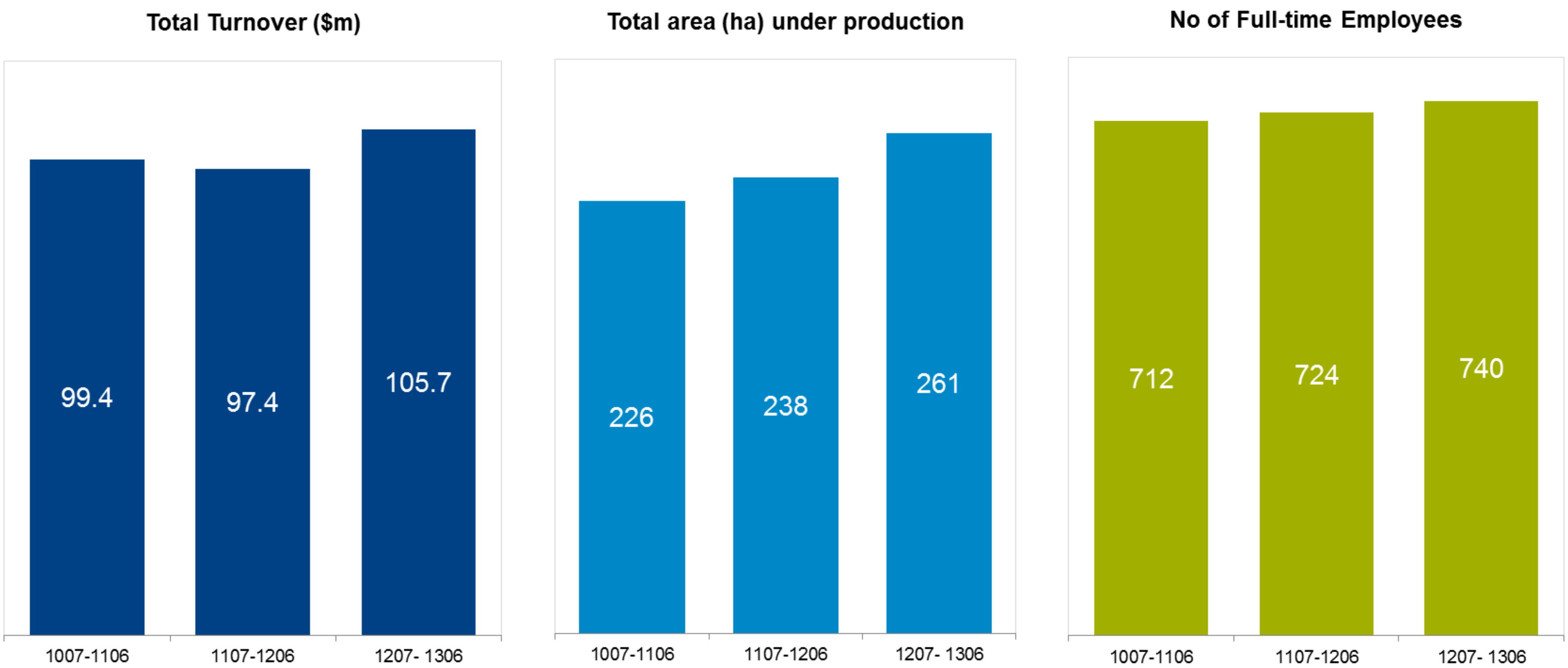




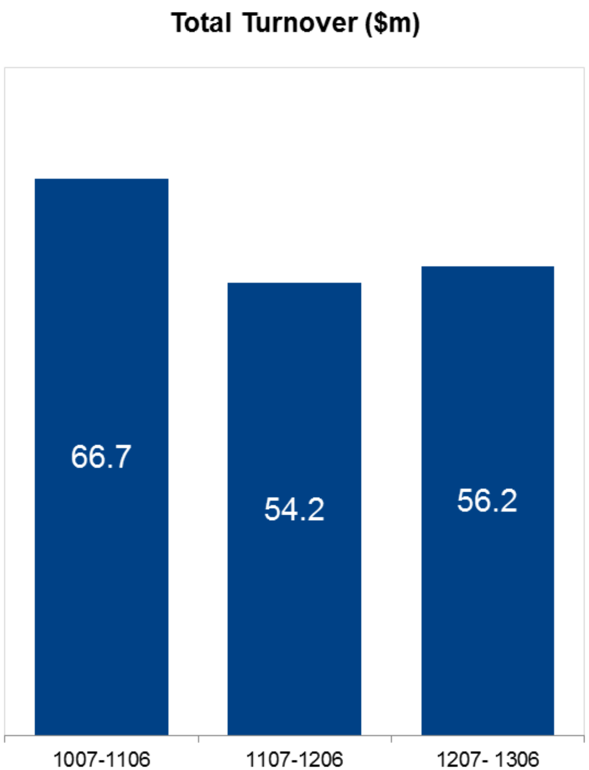
Greenlife Producer

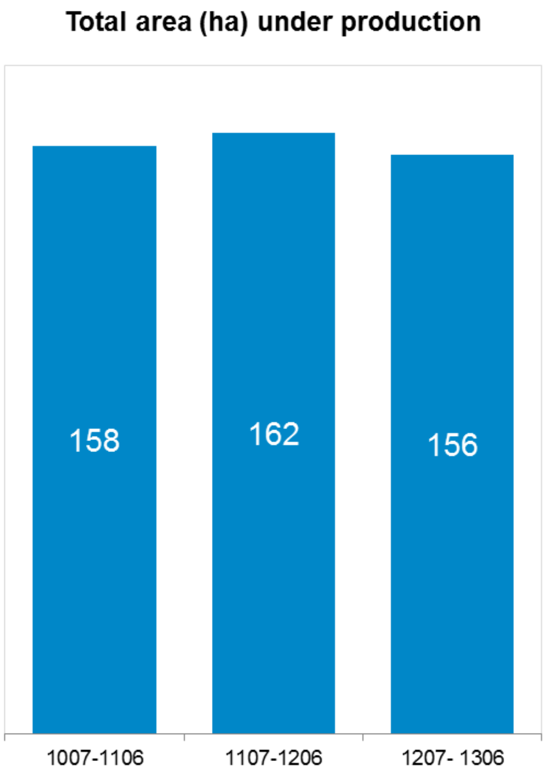
Greenlife Producer NSW/ACT

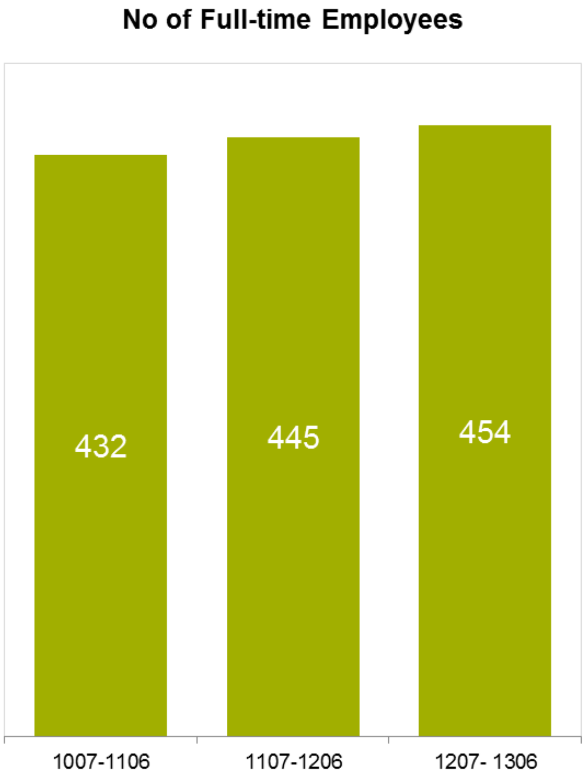
(No of respondents 59)



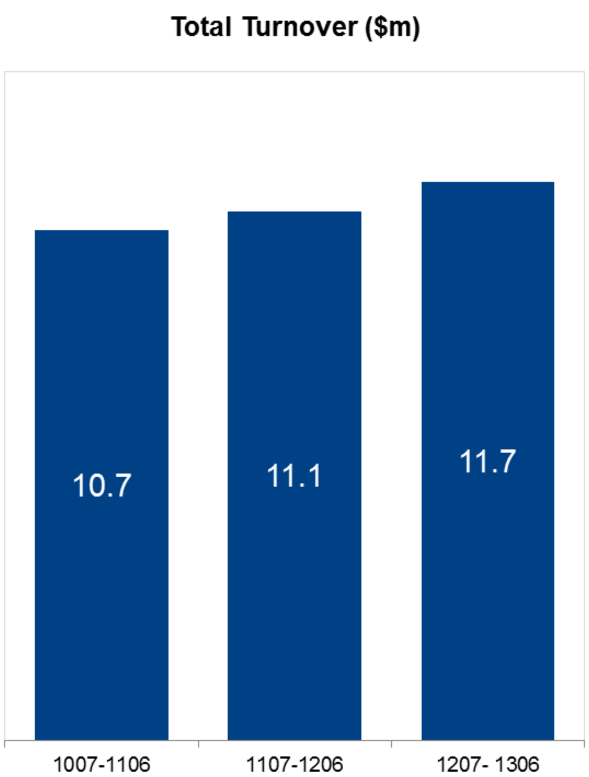
Greenlife Producer QLD
(No of respondents 50)

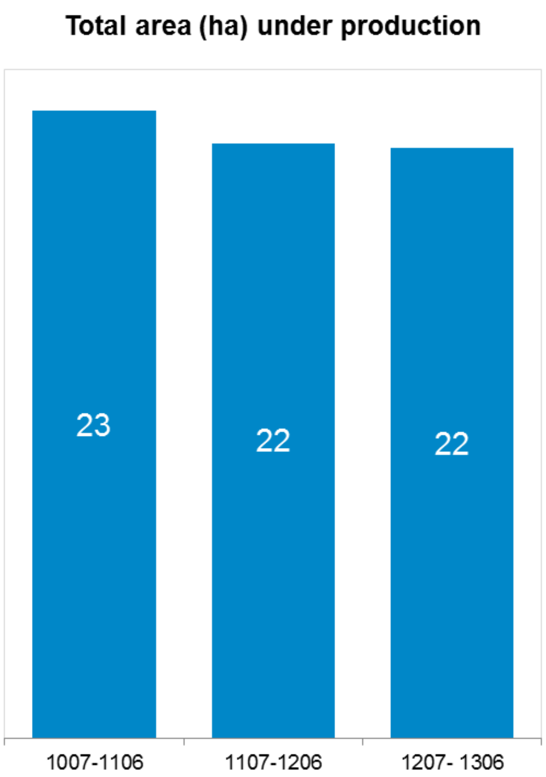


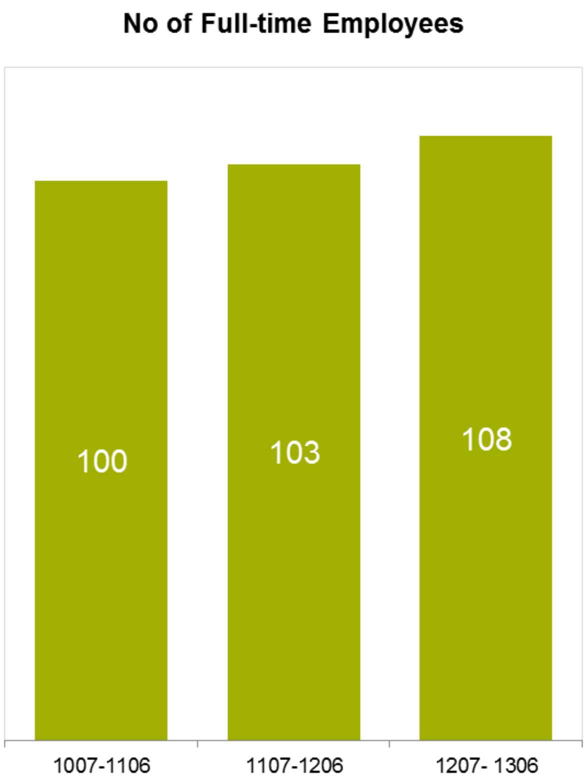




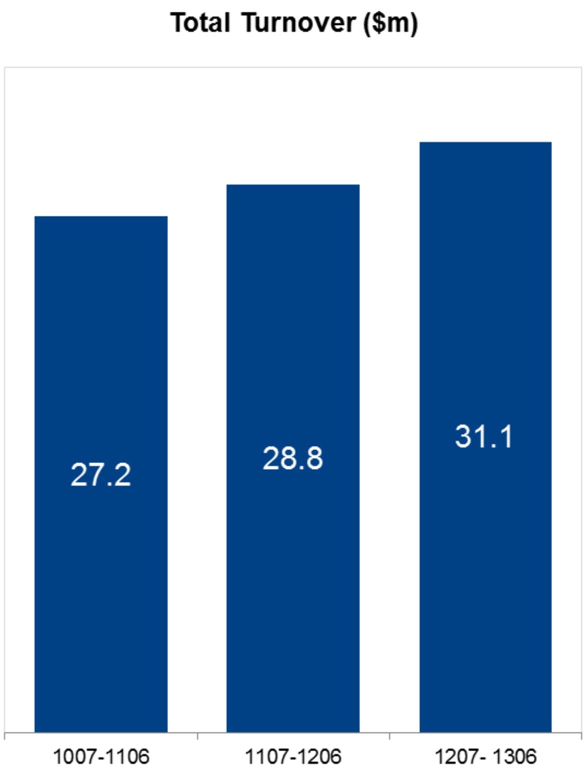
Greenlife Producer SA
(No of respondents 10)

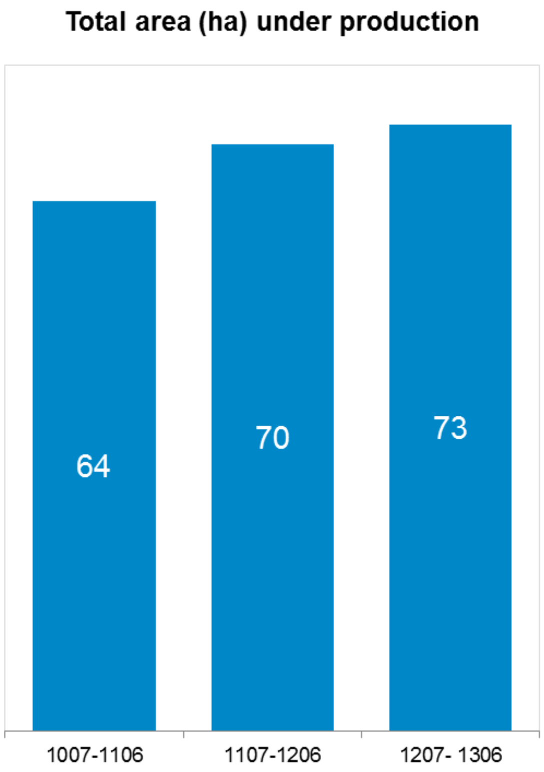


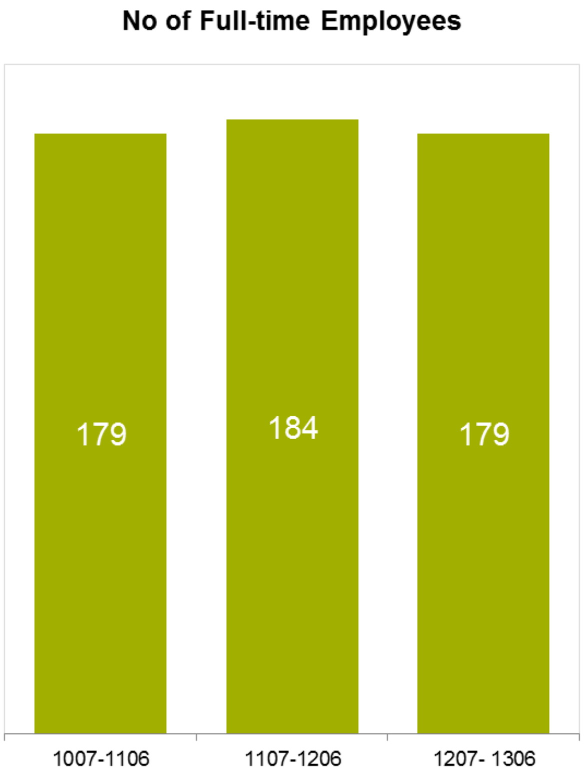




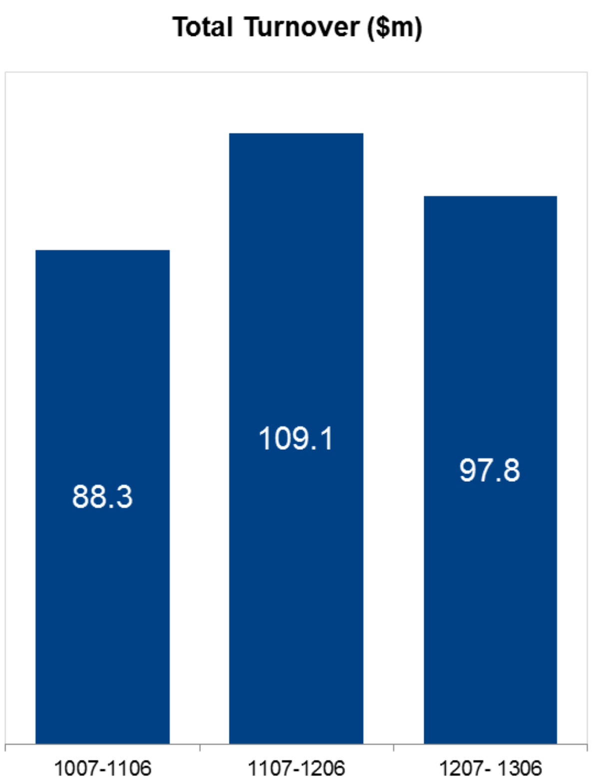
Greenlife Producer WA
(No of respondents 18)

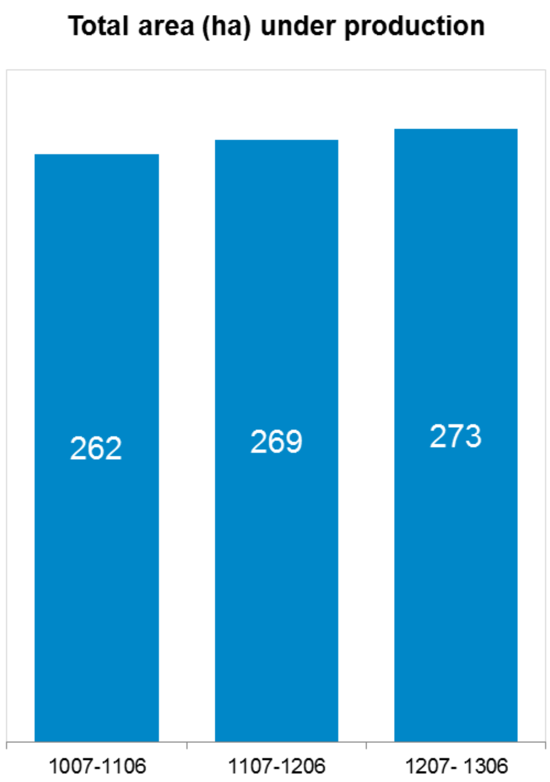


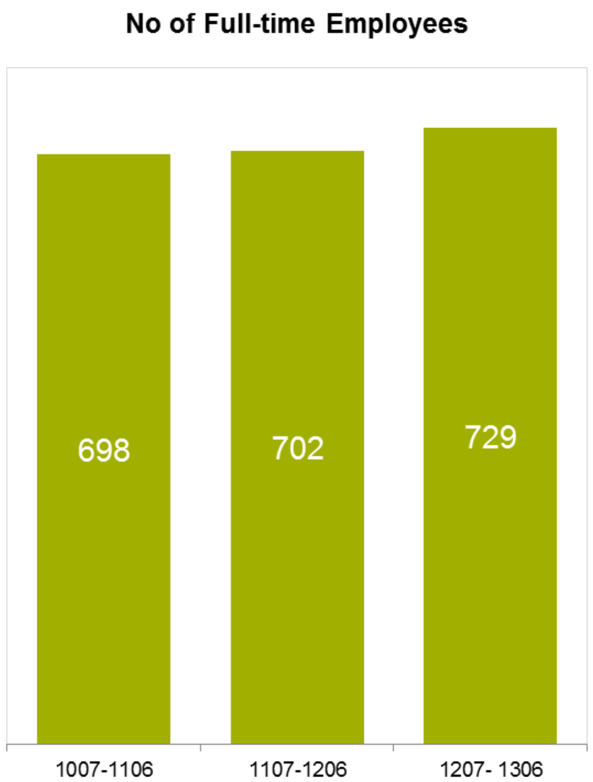




Greenlife Producer VIC
(No of respondents 53)

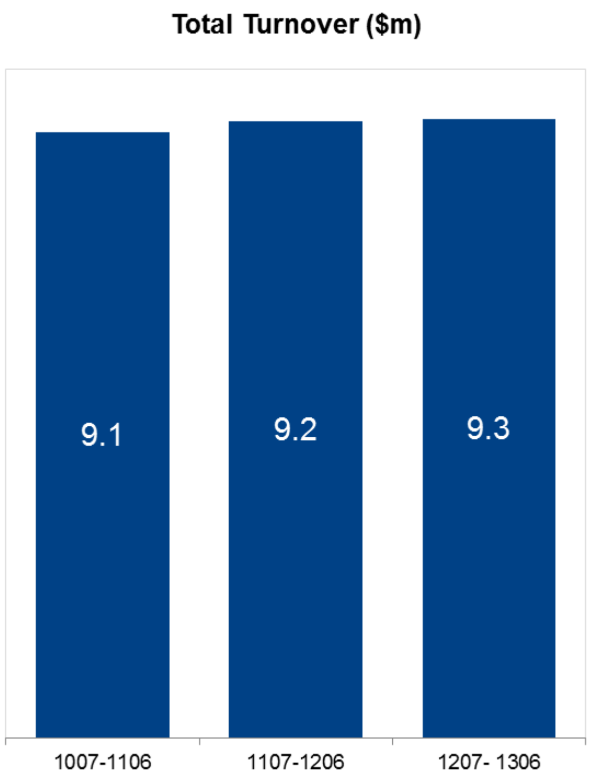


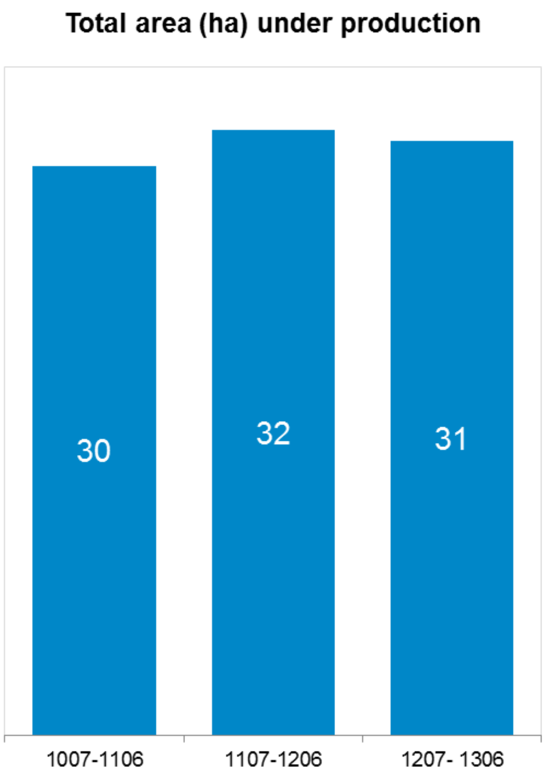


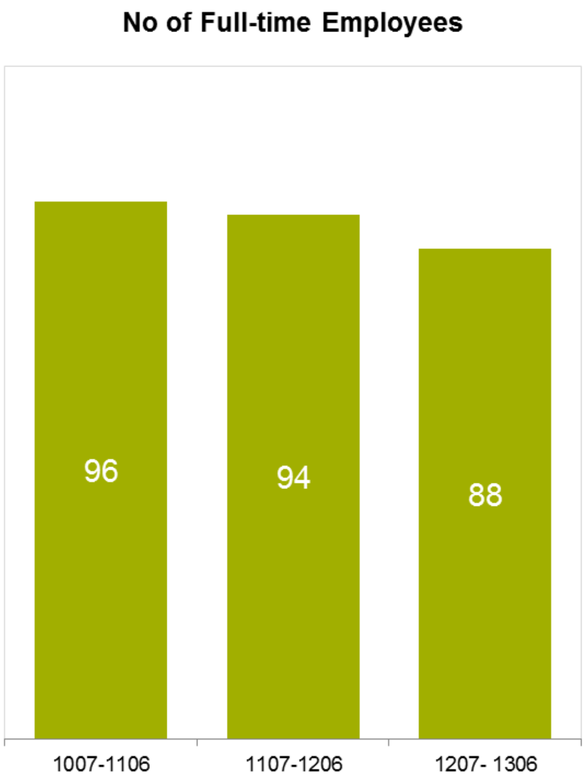


Greenlife Producer NT/TAS

(No of respondents 6)

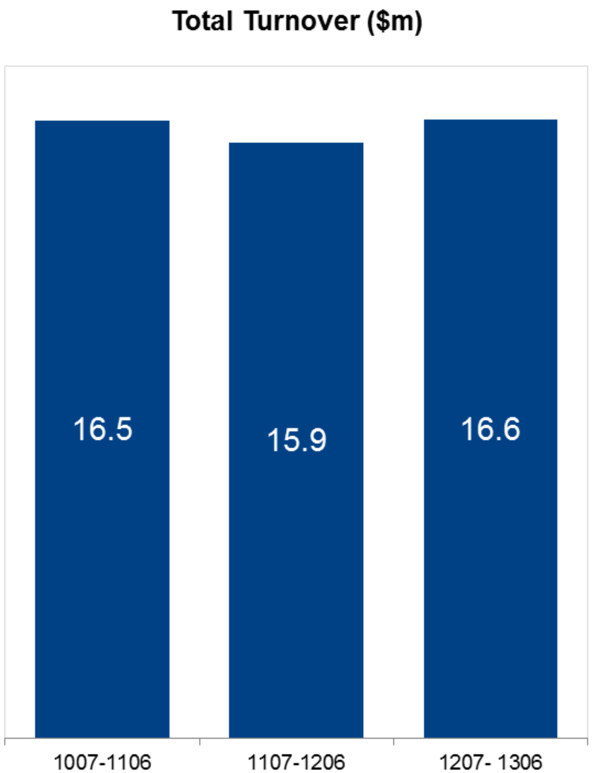


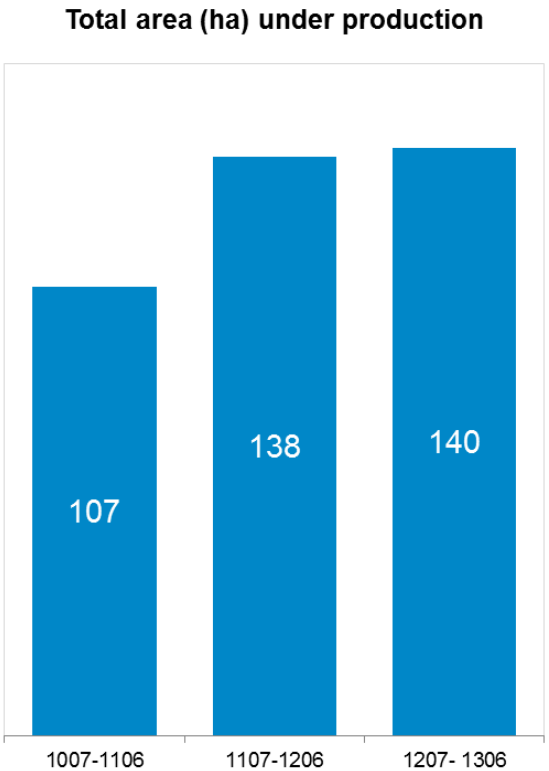


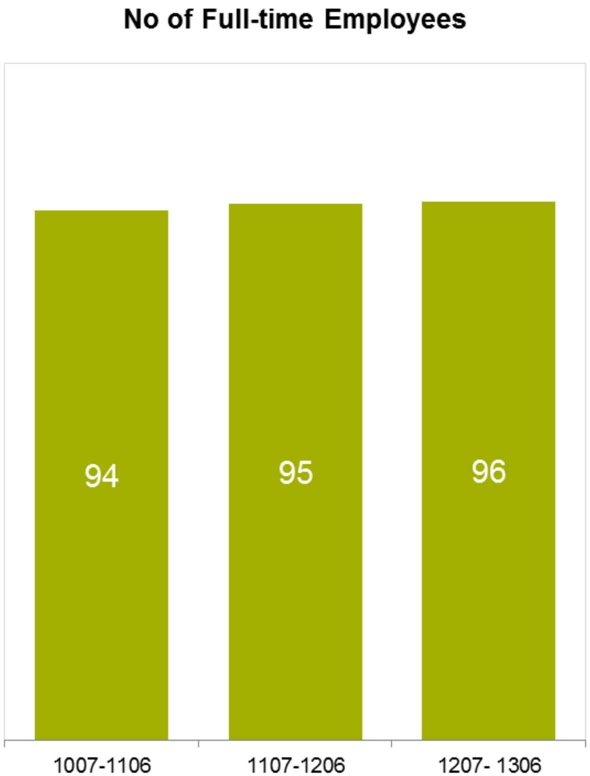


Growing Media Supplier

Growing Media Supplier NSW
(No of respondents 4)

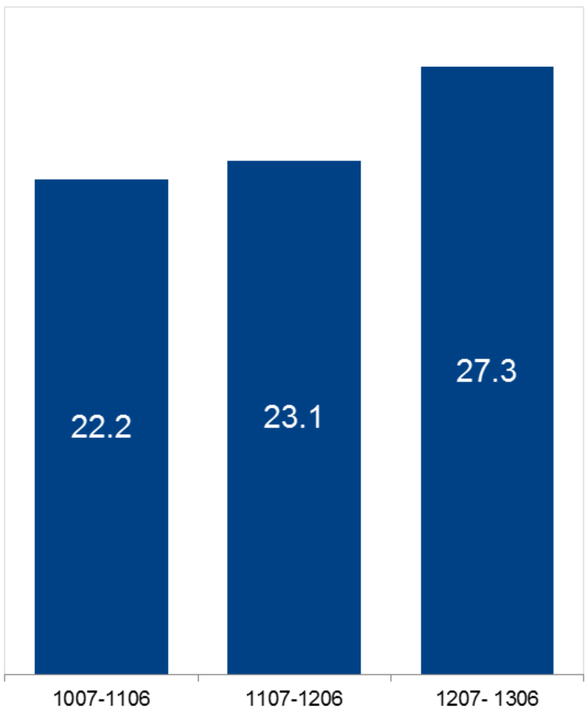




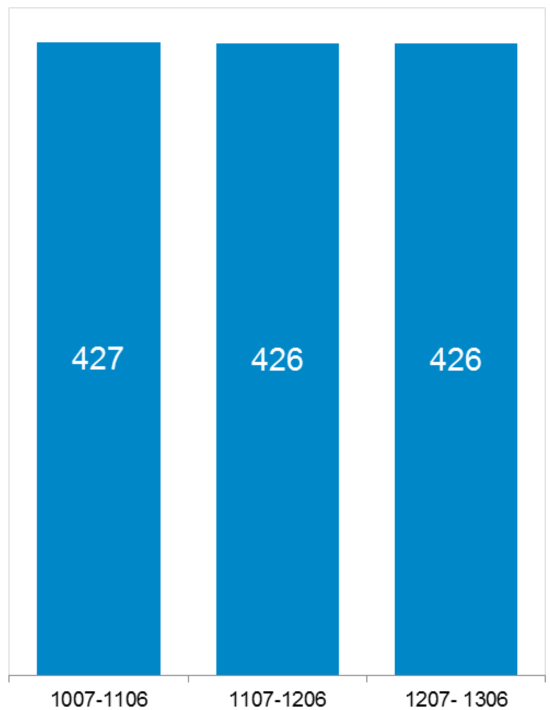


Growing Media Supplier QLD/SA/VIC
(No of respondents 4)

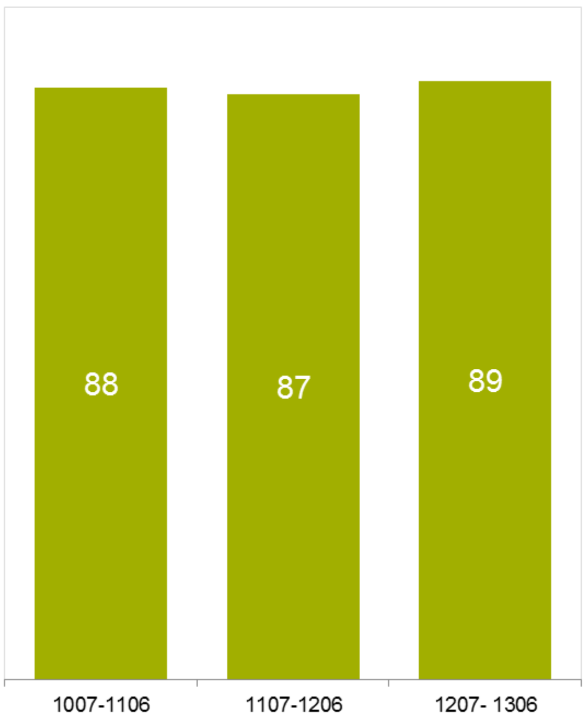
Total Turnover ($m)



Total area (ha) under production

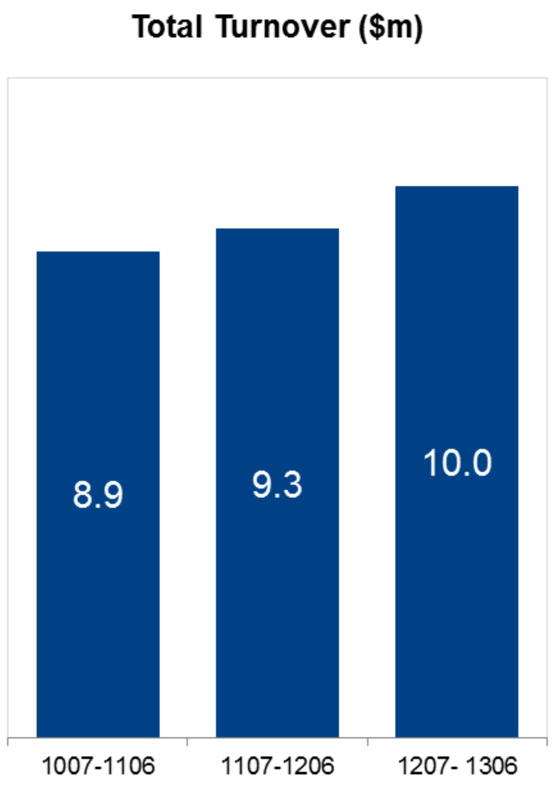


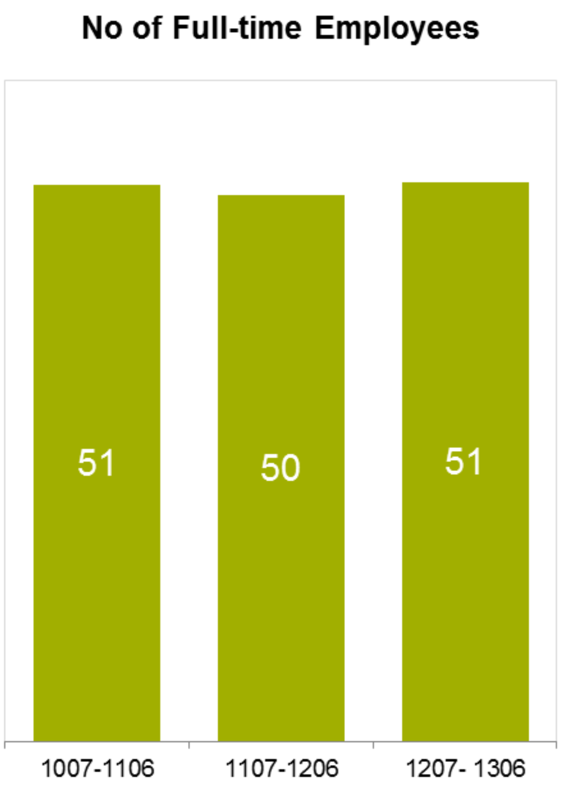
No of Full-time Employees



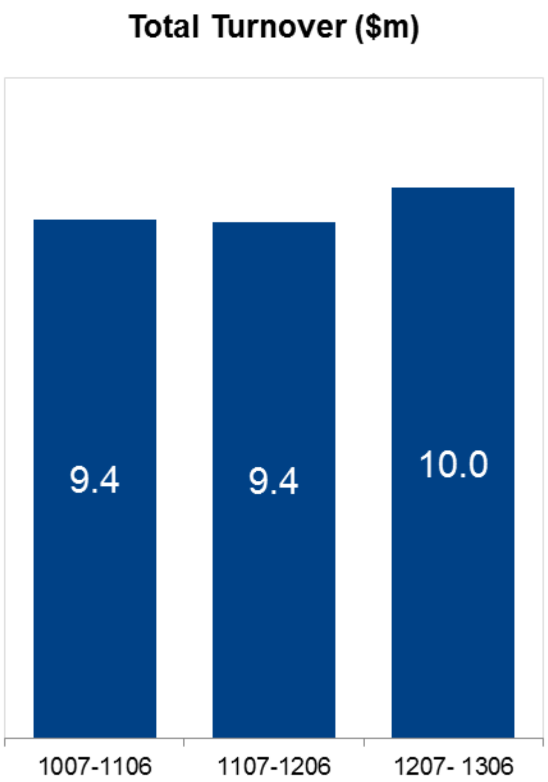
Retailer

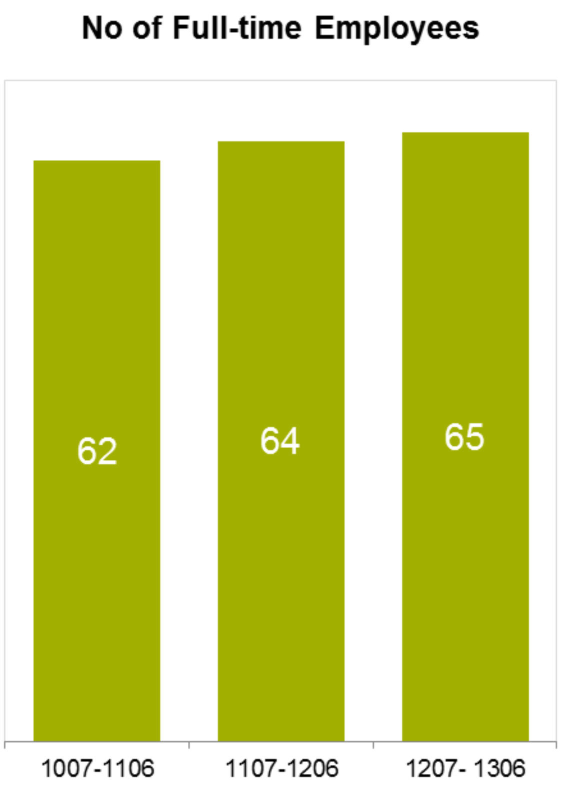
Retailer NSW
(No of respondents 12)



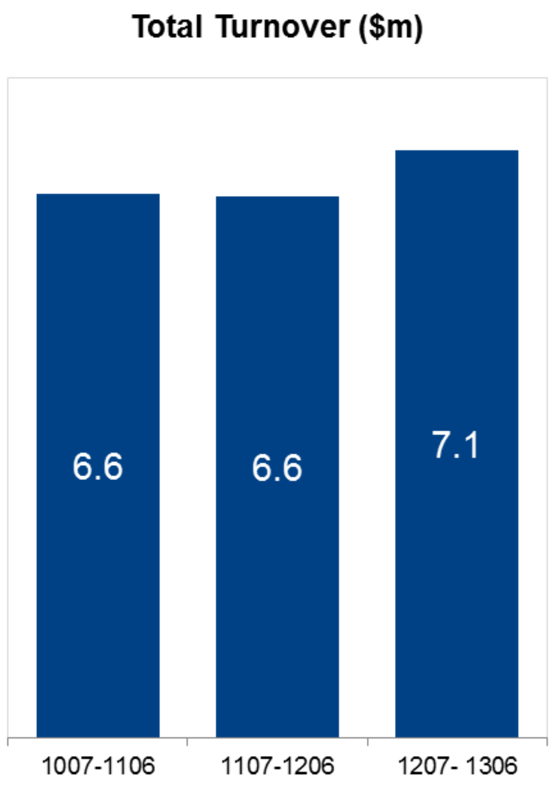


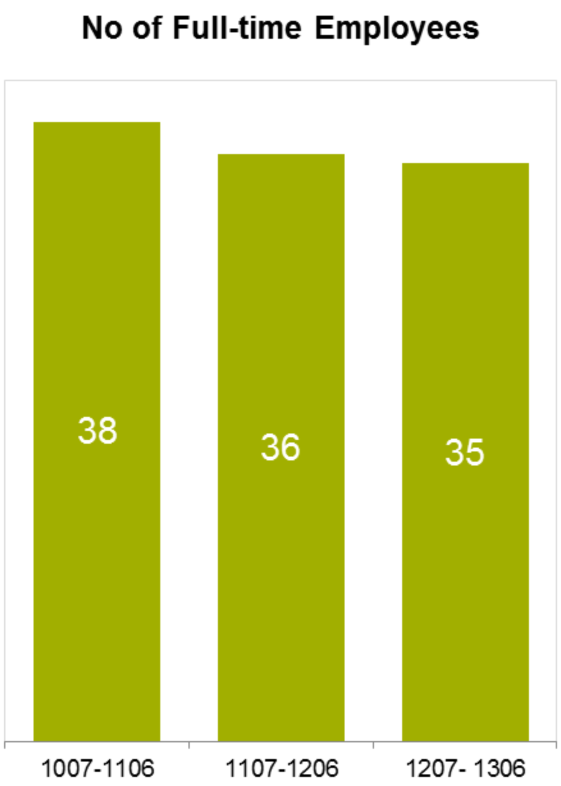
Retailer QLD
(No of respondents 9)



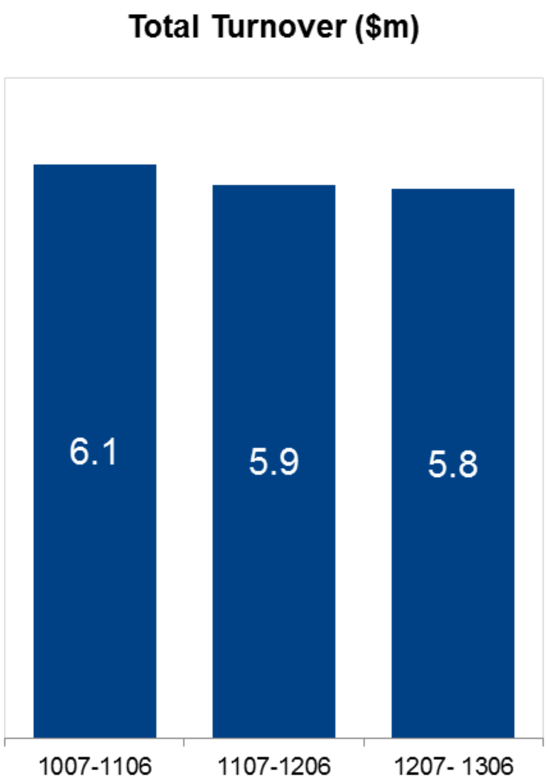


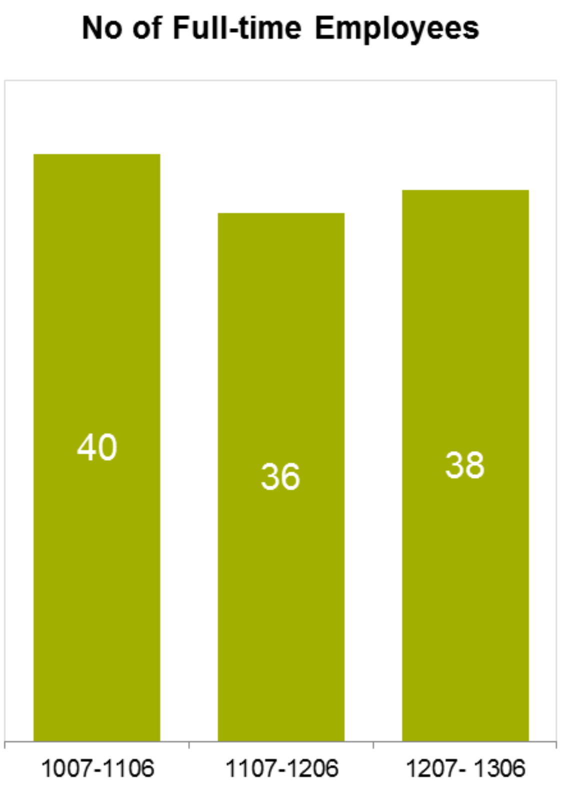
Retailer SA
(No of respondents 6)



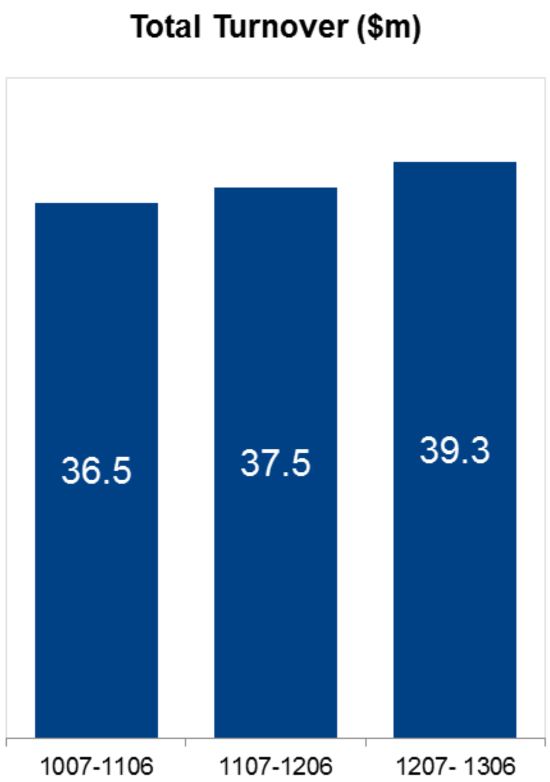


Retailer TAS
(No of respondents 4)

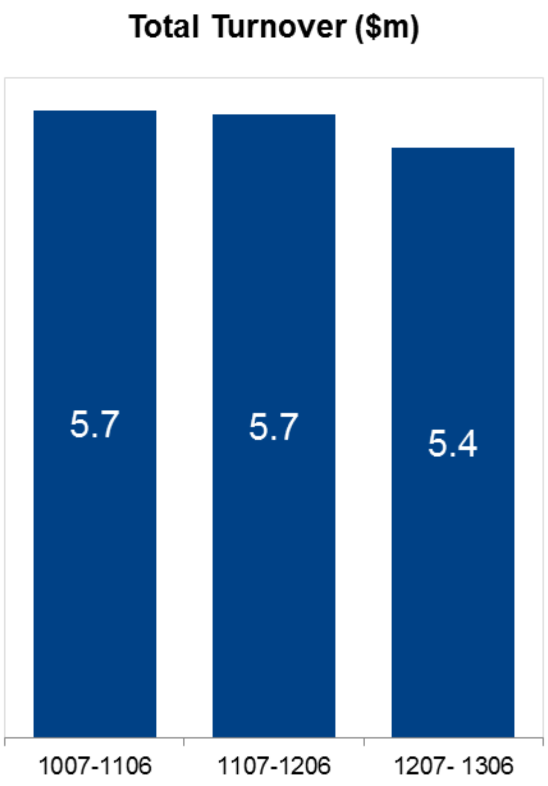


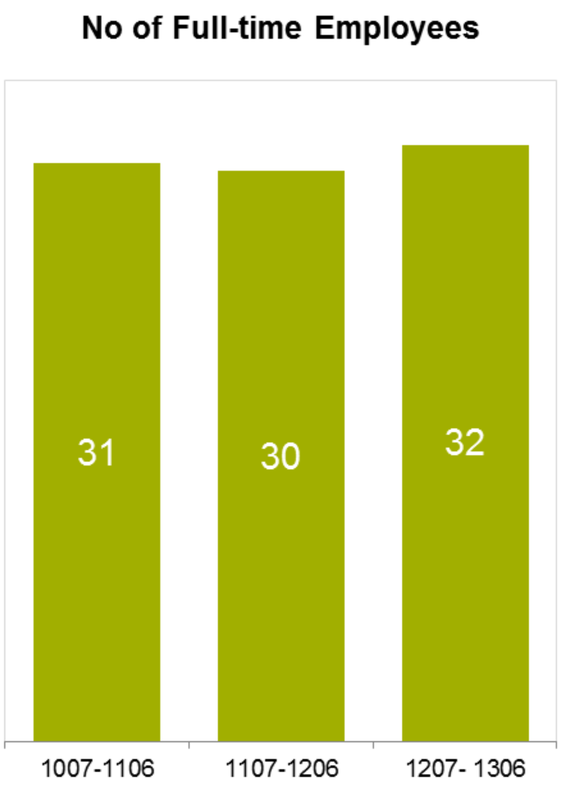


Retailer VIC
(No of respondents 15)



Retailer WA
(No of respondents 8)





Market Research

Your guide to the new market research program for the nursery and garden industry

Contents

Introduction

Nursery & Garden Industry Australia (NGIA) in conjunction with Informark, an independent market research company, have embarked on a journey to collect accurate industry market statistics.

This ambitious project seeks the support of all industry greenlife producers, allied traders and growing media suppliers in the collection of monthly industry statistics. With input into the project extending to producers and suppliers to primary industry, forestry and more, this project is the largest of its kind seen by the nursery industry.

The sole purpose of this project is to provide industry operators and the industry bodies with useful, timely information about the nursery industry market.

For participating businesses this research will enable you to see your place in the market across different segments and distribution channels, nationally and by state. You will be able to track trends against historical data and use this information to enhance your operation's strategies.

The combined effort of all contributors will deliver a powerful advocating opportunity for nursery industry association bodies and key stakeholders, a standing not previously availed to this industry. With this information industry representatives will analyse and harness the data for the benefit of all industry operators.

> "This is our Industry's opportunity to stand up and literally - be counted. Our collective information will prove, beyond a doubt, the benefits our industry provides the economy, the environment and to the health and wellbeing of our communities. I'll be contributing data – for my business and for my Industry."
>
> Craig Norman, President, Nursery & Garden Industry Australia
> Wholesale Plants & Products, South Australia

The new research team

The research team is made of two organisations and the Industry Reference Group.

NGIA

NGIA are responsible for the administration, implementation and promotion of the project. The project is funded by the Nursery Industry Levy and funds are matched by the Australian Government through Horticulture Australia (HAL).

Nursery & Garden Industry Australia

GFK Informark

GfK has been appointed as the independent market research company for this project. GfK's sell-in service, Informark, will be responsible for the collection of the industry data and production of the market reports. Informark has operated in this field for over 25 years and specialise in providing industries with reliable systems, a confidential service and quality assured output.

GfK

Industry Reference Group

NGIA and Informark are in regular contact with the Industry Reference Group. Throughout the project this group will provide NGIA and Informark with their insights to ensure collection, transparency and reporting is relevant and acceptable to industry.

The Group has provided input into the framework for data collection, market definitions, structure of the reporting, identifying and overcoming challenges to the project and more. With the assistance of this Group we have developed the foundations for a market research program that will have relevance to and longevity with Industry.

More information on the members of the Industry Reference Group can be found at www.ngia.com.au.

> "Much thought has been invested in the foundations for the research and I am confident in what the Industry Reference Group has worked to develop. We will be contributing data to the research."
>
> Hamish Mitchell, Market Research – Industry Reference Group
> Speciality Trees and Warren Park Nursery, Victoria

New features of this research project

The nursery industry does not fit into a standard research methodology and this is a key difference this project offers over past projects. This research framework has been developed by the Industry with the support of the Industry Reference Group. As a result, many concerns about data supply and credibility of reporting have been addressed in the development phase. The new features of this research project include:

- Appointment of an Industry Reference Group to assist in the establishment and review of the framework.
- Appointment of Informark, an experienced independent market research company.
- New collection methodology – collecting only from greenlife producers, allied traders and growing media suppliers giving a baseline for industry's worth at the farm gate.
- Undertaking a detailed examination of the supply chain for each sector to establish collection points and minimise double counting.
- Monthly data collection via easy to complete Excel input sheets.
- Valuable and confidential business performance report packages for individual contributors. This has never been offered before and will confidentially deliver comprehensive detail on your business performance and on trends specific to this industry.

> "To better assist with planning it is extremely important to understand, define and measure the markets we choose to operate in. These insights lead to better decision and reduced business risk. Yates is very supportive of better understanding the value and volume of the segments it operates in and will assist the Industry to establish reliable industry data that all Contributors will benefit from."
>
> David Jakobs, Market Research – Industry Reference Group
> Business Development Manager, Yates

Research methodology

In developing the framework for the research the Industry Reference Group, NGIA and Informark have made decisions having regard to a number of considerations. These include:

- Managing Industry expectations of the research.
- Balancing organisational capability to supply data with the need to deliver useful information.
- Ensuring forms are easy to follow and use.
- Ensuring the report package provides useful information that is easy to interpret.
- Balancing transparency of contributors with confidentiality and the credibility of statistics.
- Undertaking measures to ensure the research has sufficient contributors to provide meaningful reports across product categories, states and nationally.
- Establishing rules around data reporting and access guidelines for industry data.

Why you should participate

The importance of obtaining this research cannot be overstated and there are two primary reasons you should participate in the research:

For your business

You will access valuable and confidential information on your business performance and market trends not available to non-contributors.

- The information will give contributors greater confidence in business decision making reducing risk and enhancing reward.
- Over time, the provision of industry data will enable contributors to make better strategic business investment decisions.
- This data will positively support business proposals where finance is being sought.
- It will enable credible discussions with customers on trends and opportunities based on the insights gained from the reports.
- Having the insight to trends will enable contributors to take early advantage of opportunities and profit from them ahead of competitors.
- Monitoring trends will enable contributors to better service customers via informed product development, service enhancement and targeted marketing programmes.

For your Industry

The Nursery & Garden Industry needs current, accurate, reliable and sourced data. With contributions from Industry operators this program can deliver a powerful advocating tool, benefiting the whole Industry.

- This data will enable Industry to better target funding and manage policy from decision makers, peak bodies and other key stakeholders in areas including education and training, budget allocation; environment, sustainability, urban planning; health and wellbeing.
- It will give the Nursery & Garden Industry greater impact with decision makers.
- It will support future industry strategic planning, improving return on investment.
- It will give credibility to industry policy positions, decision making and longer term funding decisions.
- It will provide an accurate figure on the value of the Nursery & Garden Industry – that is supported and promoted by the Industry.

> “I see this research as the most important levy project we have. The information collected will inform future levy project planning and enable us to accurately measure industry size and growth.”
>
> David Mathews, Chairman, Industry Advisory Committee
> Proteaflora Nursery, Victoria

The reporting process

When your signed Contributor Agreement has been received by NGIA, Infomark will commence the collection and reporting process with you.

They will allocate you a username and password so you will be able to access the secure portal on the website. Through this portal you will be able to upload your data and reports.

Each month, the following stages occur in order to produce reporting:

1. Email reminders are sent by Informark to all Contributors on the 1st of every month (due date for data supply is the 10th of every month).
2. Once the 'Data Input Form' at Figure 1 has been completed, with the previous month's sales (volume) and employment data, Contributors log onto Informark's secure website, using their own unique credentials, to submit their data.
   Don't be overwhelmed by the Data Input Form. Your product lines and customer channels may mean you only complete a small number of cells in this form.
3. All 'Data Input Forms' received are validated for integrity by an experienced Informark operator.
4. The data is then run through the Informark Processing System where it is validated for consistency - any anomalies that are found are investigated. Where the anomaly cannot be explained by looking at it in comparison with historical data, or in context of current market conditions, the contributor is contacted in order to confirm the data that has been submitted.
5. Once data from all Contributors has been successfully run into the Informark Processing System, it is then aggregated accordingly to product Industry figures.
6. The reports are then produced, and final checks on the reports are conducted.
7. An email is then sent to all businesses receiving reports to advise them that the reports are available to download from Informark's secure website.
8. Businesses log on, at any time of their convenience, to then download the respective reporting.

"If you cannot measure it, you cannot improve it."

Sir William Thomson

Figure 1

Informark Sell-In Service

Nursery & Garden Industry Market Research
Greenlife

Data Input Instructions

1. complete the fields in light green and return to Informark by the **10th** calendar day after **Month** end.
2. to submit the completed form, upload this file on to the secure Informark website **https:\\www.informark.com.au**, or fax to (02) 6162 9522.

Company:		(i.e. your company's name.)
Postcode:		(i.e. the postcode for your business. State analysis in reports is based on address of business.)
Contact Name:		(i.e. the person Informark should contact if there are any queries with the data.)
Month:		(i.e. the calendar month for which you are reporting sales e.g. January 2012.)
FTE:		(i.e. **F**ull **T**ime **E**quivalent staffing levels for the month. Note that if your company reports sales in either Allied Product and/or Growing Media then this figure will only be counted once. The aggregated industry figure will be used by NGI for lobbying purposes.)
Licence Fees Collected:		(i.e. Fees or royalties collected by your company from a Licensee for the rights to produce a licensed breed of plant)

Sales **into** these channels:

Sales **of** these products:

			Greenlife Production	Brokerage/Resale *	Primary Industry	Revegetation	Government	Landscape	Retail		Export *
									Corporates	Independents & Other	
			Tubes and Plants sold to another business for potting (value add).	Plants sold to another business, to be on-sold as is, including a mark-up (no value add).	Plants sold for commercial food production, vegetable, fruit etc.	Tubes sold for revegetation purposes. Includes Forestry.	Plants sold to the Government. Includes Local, State and Federal Government, including government bodies e.g. Water Corporations, RTA.	Plants sold to landscapers, designers or developers for landscaping. Includes housing and commercial land developers.	Plants sold to "Corporate" Retailers for sale to the public. Includes Bunnings, Masters, hardware, grocery, discount department stores. Excludes franchised small business.	Plants sold to retailers other than "Corporate" for sale to the public. Includes independent and franchised garden centres and direct to consumer (inc. online).	Plants sold to another country.
Greenlife - sales in value terms (as whole $, excluding GST and pot levy)											
Seeds & Bulbs		Includes all herb, flower, vegetable, sprouts seeds; seed tapes; all bulbs (including tubers, corms etc.).									
Propagation Plants		Includes plugs, tubestock, cuttings, rooted cuttings, rootstock and tissue culture.									
Edibles (excl. Seeds & Bulbs, Propagation Plants)		Herbs, vegetables, fruit trees & vines (seedlings, standard, advanced).									
Bedding Plants & Potted Colour (excl. Edibles)		Includes annuals etc (seedlings, standard, advanced).									
Indoor (excl. Edibles)		Includes flowering, foliage, hanging baskets, palms and ferns.									
Perennial / Trees & Shrubs (excl. Edibles)	Ground Dug Stock	Includes perennials, climbers, conifers, advanced trees, deciduous trees, exotics, natives, fruit trees & vines, rose, ground covers and in-ground grown.									
	Advanced Stock (over 45L)										
	Potted Stock										

Note that company **confidential** data will not be disclosed to any third parties unless express written permission is given to do so.

* these channels will not be counted in the "Total" figures for each category; there will be separate analysis available for these channels.

This project is funded using the Nursery Industry Levy which is matched by the Australian Government through Horticulture Australia.

Frequently Asked Questions

Why is the Industry conducting the research?

The sole purpose of the project NY11004 Nursery Market Data (Nursery Industry Market Research) is to collect accurate industry statistics for uses such as those detailed under 'Why you should participate' on page 5.

How is this market research project different to previous research projects?

For information on the differences between this and past projects see 'New features of this research project' on page 4.

Who is collecting the data?

Informark, an independent market research company has been appointed to collect the data. For more information on Informark visit www.informark.com.au.

If I agree to contribute data for the research, who will my contract be with?

Agreements to contribute data will be directly with Informark and NGIA.

This agreement specifically states that NGIA will not ever see or have access to individual contributor data.

Who is data being collected from?

Data is being collected from greenlife producers, growing media suppliers and allied traders.

Why is the research limited to these sectors?

Collecting sales data from these sectors will provide a baseline for Industry's worth. There will be an opportunity to increase the scope of the project after its establishment.

What data is being requested?

Monthly sales data is being requested from three industry sectors, being greenlife producers, growing media suppliers and allied traders. Initially, historical data will also be collected from contributors, if available. This will allow for trends to be tracked earlier and will provide more value to contributors.

We are requesting contributors indicate their full time equivalent staff levels each month and this will give us a more accurate picture of the industry's employment rates, which has been difficult to capture due to its seasonality.

We are also requesting volume data for some allied product categories and growing media. The purpose of this is to assist in validating the data we have collected from the greenlife sector.

Why is the data request limited to these figures?

This information should be relatively easy for businesses to draw from their records. Once contributing organisations are comfortable with the research input process, the scope of the data collection can be reviewed by the Industry Reference Group.

What other data can the research collect?

There are many data collection opportunities including volume, stock movement, pot size and more. The inclusion of this data will require review by the Industry Reference Group. Custom reporting is also a possibility for the future but will not be offered initially.

What product groups you are collecting from?

The research is formed around product groups ensuring flexibility in the framework.

- Greenlife NSW & ACT
- Greenlife VIC
- Greenlife QLD
- Greenlife SA
- Greenlife NT
- Greenlife WA
- Greenlife TAS
- Allied Garden Product
- Growing Media

Across which categories and channels will data be collected?

The data input sheet for greenlife can be found at Figure 1. These input sheets detail the product categories and distribution channels being collected and provide definitions for easy allocation. It is important to note that not all categories and channels may be relevant to you. You may only be required to complete a small number of the cells provided. All data input sheets can be found at: www.ngia.com.au

This industry is very complex. How can you be sure you are not counting sales more than once?

We can't be sure but we can put measures in place to avoid double counting. In this case, we have mapped the industry supply chain and we are capturing data at points where double counting might occur. By capturing this data in its own channel we can remove it from the Industry total thereby ensuring accuracy in the totals and measuring an entire channel. The greenlife supply chain map is detailed in Figure 2. For the allied and growing media supply chains visit www.ngia.com.au.

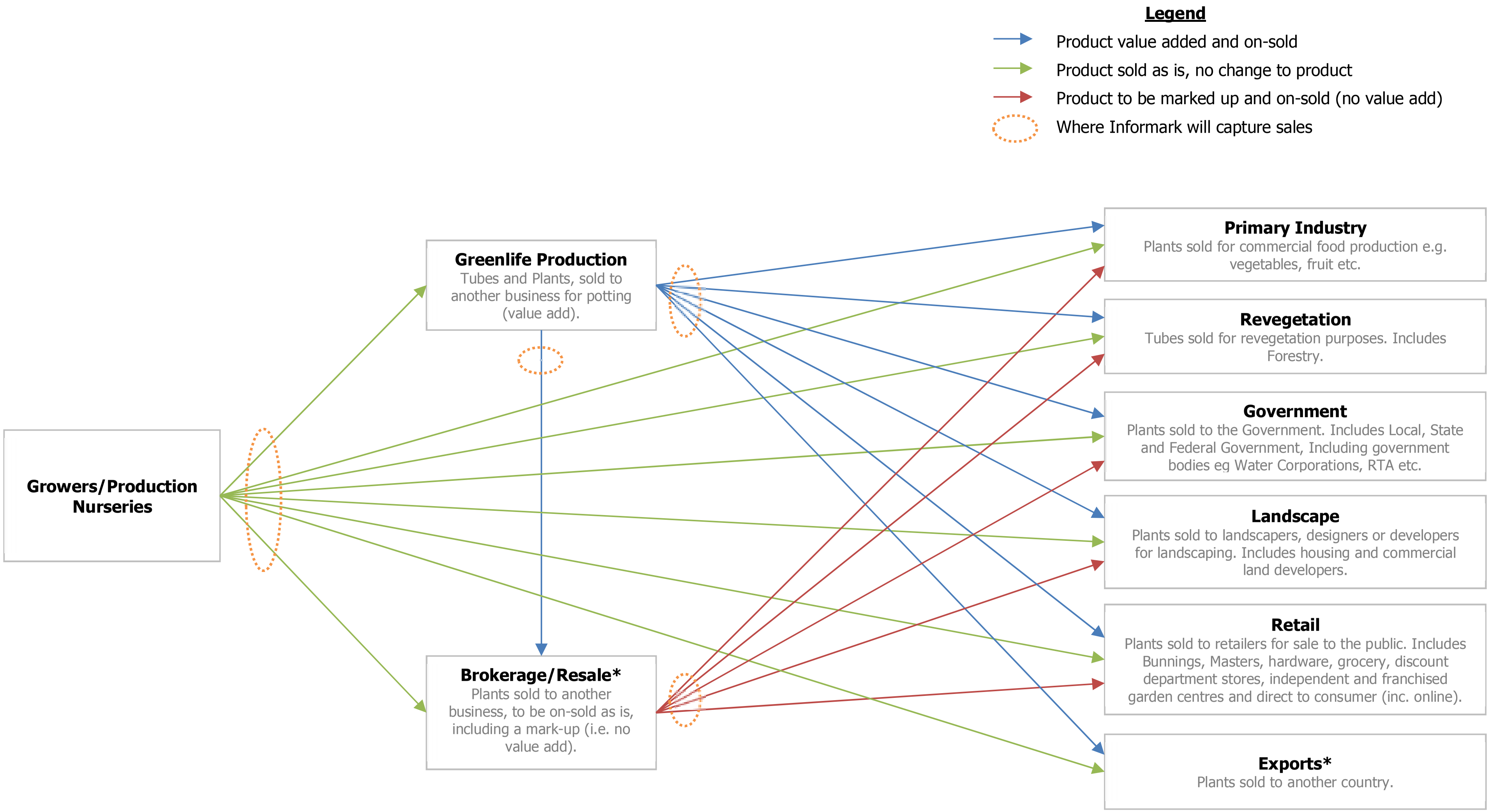
Figure 2

Informark Sell-In Service

Nursery & Garden Industry Australia Market Research Project

Greenlife Australia Supply Chain 2012

Reference month (i.e. as at) October 2012



I don't collect the information you are requesting. What does this mean?

You may need to allocate time to apply codes and set up a report in your record keeping programs in order to complete the data input sheet. This should only need to be done once and then it can be scheduled to run monthly. The benefits of the reporting will be worth the investment of time to set up this system.

How long will I need to commit to providing data?

We are requesting contributors provide monthly data for a term of three years. This has been done to ensure the success of the research project for the same term of the HAL Contract which is funding this project. NY11004 Nursery Market Data (Nursery Industry Market Research) is a three year project.

How will the data be collected?

It's all done online. Each month businesses contribute their previous months data by completing a data input form via the simple excel spreadsheet featured in Figure 1. Informark are flexible with how the information is delivered to them however any variations to the default input sheet should be discussed directly with Informark.

Contributors will upload their completed data input sheet to the secure Informark website. Once all contributors have provided their data to Informark and quality assurance checks are completed, reporting will be produced.

How much time will it take to complete the data input form?

The form is simple and easy to follow as detailed in Figure 1. The time it will take to complete will vary depending on the capabilities of each business.

When does collection happen?

You will be asked to provide your previous month's data around the 10th day of each month. This request will be emailed to you with the accompanying data input sheet.

Which product group (geographical point) should I report my data into?

Greenlife producers should report data based on where the contributing business is geographically located.

Allied and Growing Media contributors should report data based on which State the category line is sold into. In this case, a data input sheet may need to be completed for each State.

When is reporting received?

If you have elected to receive a single free annual report, this will be available after the relevant financial year, for each year of the contract. If you have elected to receive the reports monthly, your report will be available around the 24th day of each month. All report timing is subject to contributors submitting data by the nominated date.

How will I know when my reports are ready?

For all report packages, you will be advised by email that your report package is available for download from the secure Informark website. All report timing is subject to contributors submitting data by the nominated date.

What is included in my report package?

Each report package includes the following.

- Data Input Record
- Company Performance for Latest Month
- Company Performance for Financial YTD
- Employment Levels Analysis
- Channel Performance Analysis
- Market Share Trend Analysis – (one report for each product category eg Seeds & Bulbs or Plant care)

Figure 4 highlights the 'Company performance' and Figure 5 'Market share trend analysis' reports. For the detailed sample package visit: www.ngia.com.au

Who will have access to what information?

There are four levels of access: Contributor, Non-Contributor, Public and NGI.

Contributor reporting is available only to businesses that contribute data to that sector. Each individual contributor report package is provided confidentially to each contributor using a unique login on the Informark website. No competitor sales are disclosed to other businesses.

The table on page 11 details the access levels for reporting.

Will others know if I have contributed to the research?

Yes. The report package includes a Data Input Record, a sample of this report is shown at Figure 3. This simply details the businesses that contributed for a product group in that month and the date they contributed the data. Making this information available demonstrates the transparency of the methodology, instils confidence and provides a greater understanding of the figures reported.

Access levels for reporting

	Contributor	Non-Contributor	Public	NGI (National & State Associations)
Industry Aggregate Figures – National Level	✓	✓value only	✓	✓
Industry Aggregate Figures – State Level	✓	✓value only		✓
Industry Aggregate Figures – Channel Level	✓	✓value and totals only		✓
Industry Employment Figures	✓			✓
Data Input Record	✓			✓
Own Company Figures	✓			

How much will the report package cost?

If you contribute to the research you have two choices. Either, opt to receive a free annual report; or purchase monthly reports for a substantially reduced fee. The Contributor Report Order Form details the fee for the monthly report package.

Non-contributors will pay a significantly higher fee to access the industry aggregated information only and will need to apply to the NGIA Board to purchase the report. Informark will not sell the information to a non-contributor without approval from the NGIA Board. A percentage of the total fee will be reinvested into the continuation of industry market research. The Report Request Form details the fee for the report package.

Where do I purchase reports from?

In order to access reports, you will need to complete a Report Order Form and return it to Informark. You will receive an invoice for payment to Infomark.

How will the information in my report package benefit me?

For information on how the research will benefit your business see 'Why you should participate' on page 5.

How will the information benefit industry bodies?

For information on how the research will benefit Industry see 'Why you should participate' on page 5.

Is the report package a tax deductable expense?

Our understanding is that a research report such as this would be a tax deductable expense however, independent taxation advice should be sought as individual circumstances may vary.

Do I need to seek professional advice about the agreement?

Individual circumstances may vary so we encourage every industry operator to undertake their own due diligence and to seek any advice they see fit.

Will my contact details be provided to any third parties?

No.

Who owns the information?

You retain ownership of your information. Informark owns the format and information presented in the reports. At the conclusion of the contract with Informark, reports will remain available for purchase by contributors for a period of 12 months.

What happens if I don't participate?

The more participants in the research project the more accurate the data, so we encourage contribution from as many businesses as possible. Your participation will be rewarded with valuable business information. If you choose not to contribute to the project, we will respect your choice.

Sign up process

To sign up as a contributor to the market research project you need to complete the Contributor Agreement. You can register to receive a copy of the agreement online at www.ngia.com.au. Alternatively contact NGIA on (02) 8861 5100 for a copy to be mailed to you. Signed agreements need to be forwarded directly to NGIA.

Nursery Industry Market Research

NGIA

PO Box 7129

Baulkham Hills BC, NSW, 2153

"The team has worked hard to build a research program specifically for the benefit of both your business and your Industry. The results will allow your association bodies to vigorously and professionally represent the Nursery & Garden Industry with the knowledge that the evidence is reliable. My experience has shown that our Industry is compromised without this data and so I unreservedly encourage your contribution."

Robert Prince
CEO, Nursery & Garden Industry Australia

For more information

For more information on the Nursery & Garden Industry Market Research Project please contact Nursery & Garden Industry Australia on (02) 8861 5100 or visit www.ngia.com.au. Alternatively, please do not hesitate to contact the members of the Industry Reference Group or your State Association.

Figure 3

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife NSW & ACT
Data Input Record - June 2012
Produced: 24/07/2012

CONFIDENTIAL
Not To Be Published Externally

Company	Date Received	Company	Date Received
Company 1	dd/mm/yyyy	Company 51	dd/mm/yyyy
Company 2	dd/mm/yyyy	Company 52	dd/mm/yyyy
Company 3	dd/mm/yyyy	Company 53	dd/mm/yyyy
Company 4	dd/mm/yyyy	Company 54	dd/mm/yyyy
Company 5	dd/mm/yyyy	Company 55	dd/mm/yyyy
Company 6	dd/mm/yyyy	Company 56	dd/mm/yyyy
Company 7	dd/mm/yyyy	Company 57	dd/mm/yyyy
Company 8	dd/mm/yyyy	Company 58	dd/mm/yyyy
Company 9	dd/mm/yyyy	Company 59	dd/mm/yyyy
Company 10	dd/mm/yyyy	Company 60	dd/mm/yyyy
Company 11	dd/mm/yyyy	Company 61	dd/mm/yyyy
Company 12	dd/mm/yyyy	Company 62	dd/mm/yyyy
Company 13	dd/mm/yyyy	Company 63	dd/mm/yyyy
Company 14	dd/mm/yyyy	Company 64	dd/mm/yyyy
Company 15	dd/mm/yyyy	Company 65	dd/mm/yyyy
Company 16	dd/mm/yyyy	Company 66	dd/mm/yyyy
Company 17	dd/mm/yyyy	Company 67	dd/mm/yyyy
Company 18	dd/mm/yyyy	Company 68	dd/mm/yyyy
Company 19	dd/mm/yyyy	Company 69	dd/mm/yyyy
Company 20	dd/mm/yyyy	Company 70	dd/mm/yyyy
Company 21	dd/mm/yyyy	Company 71	dd/mm/yyyy
Company 22	dd/mm/yyyy	Company 72	dd/mm/yyyy
Company 23	dd/mm/yyyy	Company 73	dd/mm/yyyy
Company 24	dd/mm/yyyy	Company 74	dd/mm/yyyy
Company 25	dd/mm/yyyy	Company 75	dd/mm/yyyy
Company 26	dd/mm/yyyy	Company 76	dd/mm/yyyy
Company 27	dd/mm/yyyy	Company 77	dd/mm/yyyy
Company 28	dd/mm/yyyy	Company 78	dd/mm/yyyy
Company 29	dd/mm/yyyy	Company 79	dd/mm/yyyy
Company 30	dd/mm/yyyy	Company 80	dd/mm/yyyy
Company 31	dd/mm/yyyy	Company 81	dd/mm/yyyy
Company 32	dd/mm/yyyy	Company 82	dd/mm/yyyy
Company 33	dd/mm/yyyy	Company 83	dd/mm/yyyy
Company 34	dd/mm/yyyy	Company 84	dd/mm/yyyy
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Company 44	dd/mm/yyyy	Company 94	dd/mm/yyyy
Company 45	dd/mm/yyyy	Company 95	dd/mm/yyyy
Company 46	dd/mm/yyyy	Company 96	dd/mm/yyyy
Company 47	dd/mm/yyyy	Company 97	dd/mm/yyyy
Company 48	dd/mm/yyyy	Company 98	dd/mm/yyyy
Company 49	dd/mm/yyyy	Company 99	dd/mm/yyyy
Company 50	dd/mm/yyyy	Company 100	dd/mm/yyyy

This report is to provide transparency of which businesses have contributed data to the NSW Greenlife report, and the date the data was received by Informark.

In the live report, the name of each Business that has contributed data will be listed on this page.

Figure 4

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife NSW & ACT
Company Snapshot - Current Month
Produced: 24/07/2012

Demonstration Only - Contains Sample Data

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This report shows your percentage share of the total market in each category and channel you contribute data to, for the latest month. Use this report to identify areas of strength, and opportunities for further growth for your business.

Lists the product categories reported

Explains what data is displayed, and the timeframe

Total of each category

The Brokerage and Export Channels are not counted in the "Total" figures for each category.

Own Company Market Shares - June 2012

	Greenlife NSW & ACT - Based on Value ($)		Greenlife Production	Primary Industry	Revegetation	Government	Landscape	Retail: Corporates	Retail: Independents & Other	Retail: Total	Total	Brokerage / Resale	Export
15	Seeds & Bulbs							5.0%		**2.5%**	**10.0%**	12.0%	3.0%
16	Propagation Plants												
17	Edibles (Excl. Seeds & Bulbs, Propagation Plants)												
18	Bedding Plants and Potted Colour (Excl. Edibles)												
19	Indoor (Excl. Edibles)												
20	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	75.0%	10.0%	5.0%	25.0%	100.0%				**80.0%**		
21		Advanced Stock (over 45L)	28.0%		3.0%	30.0%	100.0%				**70.0%**		
22		Potted Stock	32.0%	8.0%	1.0%	15.0%					**25.0%**		
23		**Total**	**40.0%**	**6.0%**	**6.0%**	**22.0%**	**75.0%**				**60.0%**		
24	**Total**		**70.0%**	**1.0%**	**0.1%**	**9.0%**	**50.0%**	**0.2%**		**0.1%**	**30.0%**	**2.0%**	**0.4%**

Total of each channel

This report shows your growth in each category and channel you contribute data to, comparing this month with the same month last year. Use this report to track how your business is performing, and flag underperforming categories.

Own Company Growth - June 2012

	Greenlife NSW & ACT - Based on Value ($)		Greenlife Production	Primary Industry	Revegetation	Government	Landscape	Retail: Corporates	Retail: Independents & Other	Retail: Total	Total	Brokerage / Resale	Export
35	Seeds & Bulbs							0.1%	0.1%	**0.1%**	**3.0%**	3.0%	7.0%
36	Propagation Plants												
37	Edibles (Excl. Seeds & Bulbs, Propagation Plants)												
38	Bedding Plants and Potted Colour (Excl. Edibles)												
39	Indoor (Excl. Edibles)												
40	Perennial / Trees & Shrubs (Excl. Edibles)	Ground Dug Stock	15.0%	2.0%	-0.1%	5.0%	20.0%				**16.0%**		
41		Advanced Stock (over 45L)	10.0%		-1.5%	10.2%	60.0%				**17.1%**		
42		Potted Stock	8.0%	0.1%	-2.7%	9.3%					**10.4%**		
43		**Total**	**10.0%**	**1.0%**	**-1.2%**	**8.2%**	**30.0%**				**16.5%**		
44	**Total**		**14.0%**	**0.1%**	**-1.0%**	**1.8%**	**10.0%**	**0.1%**	**0.1%**	**0.1%**	**6.0%**	**1.0%**	**3.4%**

Figure 5

Informark Sell-In Service
Nursery & Garden Industry Market Research
Greenlife NSW & ACT
Market Share Trend Analysis - Perennial / Trees & Shrubs (Excl. Edibles)
Produced: 24/07/2012

Demonstration Only - Contains Sample Data

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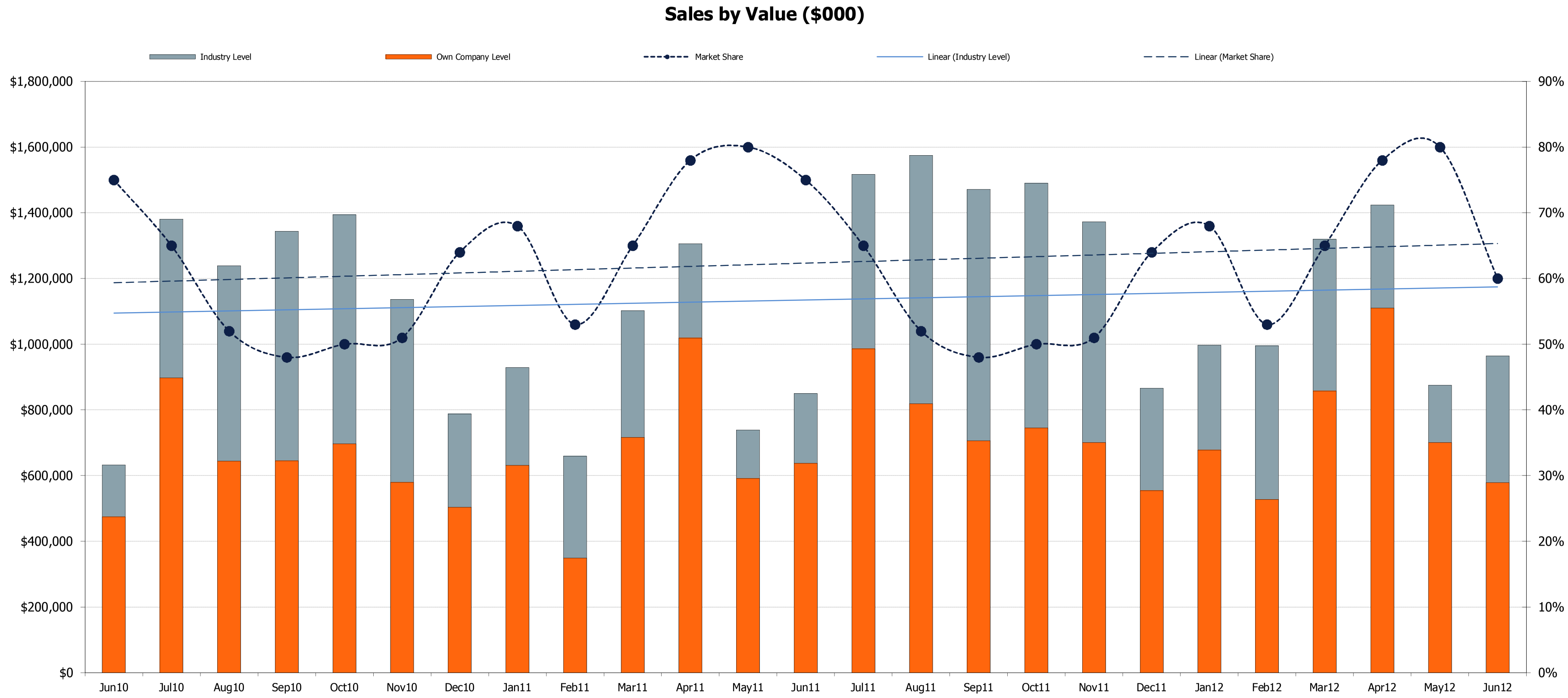
This chart shows the sales for Perennial/Trees & Shrubs in NSW, both the aggregated Industry figures and your own company sales. Also displayed is your share of the market, as well as how your business and the industry is trending over 25 months. Use this information to track performance over time, and get an idea of where the market is heading. This highlights any potential problems, or shifts in the market. Seasonality can also be analysed, so you can plan for the future.



	Jun10	Jul10	Aug10	Sep10	Oct10	Nov10	Dec10	Jan11	Feb11	Mar11	Apr11	May11	Jun11
Industry Level (value)	632,000	1,380,869	1,238,951	1,343,568	1,393,999	1,136,394	787,359	928,946	659,324	1,101,418	1,305,535	739,101	850,000
Own Company Level (value)	474,000	897,565	644,254	644,913	696,999	579,561	503,910	631,683	349,442	715,922	1,018,317	591,281	637,500
Market Share	75.0%	65.0%	52.0%	48.0%	50.0%	51.0%	64.0%	68.0%	53.0%	65.0%	78.0%	80.0%	75.0%

	Jul11	Aug11	Sep11	Oct11	Nov11	Dec11	Jan12	Feb12	Mar12	Apr12	May12	Jun12
Industry Level (value)	1,516,869	1,574,951	1,471,568	1,489,999	1,372,394	865,359	996,946	995,324	1,319,418	1,423,535	875,101	964,207
Own Company Level (value)	985,965	818,974	706,353	744,999	699,921	553,830	677,923	527,522	857,622	1,110,357	700,081	578,524
Market Share	65.0%	52.0%	48.0%	50.0%	51.0%	64.0%	68.0%	53.0%	65.0%	78.0%	80.0%	60.0%

This project is funded by the Nursery Industry Levy and funds are matched by the Australian Government through Horticulture Australia (HAL).

Nursery & Garden Industry

HAL

Horticulture Australia

GfK

Australian Bureau of Statistics

Australian Government
Department of Agriculture
ABARES

National Agricultural Statistics Review (NASR)

SUBMISSION COVER SHEET

Please complete and submit this form with your submission:

By email (preferred): nasr@daff.gov.au **OR** **By mail:**
Australian Bureau of Statistics
GPO Box 66
Hobart
Tasmania 7001
By telephone:
1800 683 051 – NASR Project Team

Name (first name and surname): Kobie Keenan

If submitting on behalf of a company or organisation:

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Submission to the National Agricultural Statistics Review (NASR)

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Date: 14 February 2014

Contents

Introduction

Nursery & Garden Industry Australia (NGIA) is grateful for the opportunity to make a submission to the National Agricultural Statistics Review. For several years our industry has been concerned by the discrepancies in data reported through ABS and ATO regarding nursery production statistics including industry value and number of businesses operating in the industry and as such, we welcome this review.

Due to these data discrepancies, the nursery industry is currently conducting and funding its own research project to capture industry data and is also concurrently seeking advice from ABS on nursery industry user funded surveys.

We believe that the joining of ABS and ABARES into the review will provide a holistic perspective on agricultural data. However we also see a need for several other statistical agencies to work with ABS and ABARES to consider procedures which will also contribute to an improvement in reporting to the nursery industry.

In this submission, we respond to the submission questions directly and also provide general commentary on key issues specific to the nursery industry.

Background

The nursery industry is far broader than the 'perceived' ornamental market, with businesses involved in large scale forestry, nurseries, medicinal products, cut flowers, alcohol production, revegetation for mine sites, landscaping and starter plants for fruit and vegetable production all engaged as levy payers.[1]

The scope of the nursery industry is extensive and the value of plants increases overtime. Understanding the specifics of the nursery industry will demonstrate that the industry should not only be valued by what leaves the farm but also how, over time, the vegetative products (greenlife) it produces positively impact human health, climate, productivity, urban sustainability.

NGIA is a member of Horticulture Australia (HAL). Through HAL, the nursery industry levy program is facilitated in partnership with NGIA. The program is funded by the nursery products Research & Development and Marketing levy as well as voluntary contributions from industry. The Australian Government provides matched funding for all HAL's Research & Development activities. It is through this levy program that NGIA continues to consider a more appropriate data collection methodology than is currently being employed by the various collection agencies.

Since 2012, NGIA has also been in discussions with ABS working to improve the representation of the nursery industry both with the agency and within the data collected. ABS has been very helpful in working with industry to identify data sources outside of the ABS collections to assist the industry in understanding their collection processes and different ways to interrogate the data available through

[1] 2010-2015 Nursery Industry Strategic Plan

the ABS. Unfortunately, during this time we have been unable to encourage any change in survey questioning. Additionally, by ABS referring industry to alternative data sources, we have considerable concern relating to data discrepancies between agencies, an example between ABS and ATO is provided below.

As the benefits of greenlife become more apparent to government, the corporate sector and community, the need for nursery industry data will continue to grow. It is essential to have accurate, reliable and timely data to ensure that as a nation we can maintain, protect and support the financial investment (by growers) and to quantify the financial benefit of greenlife over time. The information gained will benefit multiple organisations including industry, all tiers of government and the corporate sector.

Section 1 - Nursery industry and the enduring goals for Australian agriculture

Many of the enduring goals for agriculture align with the 2012-2016 Nursery Industry Strategic Investment Plan.

The nursery industry is working towards establishing prosperous communities and addressing issues such as climate change and natural resource management by communicating the value and benefits of greenlife on the health and productivity of our nation to the community. There is a growing body of research both domestic and international that support the need to improve our surroundings including that plants are good for our health and productivity, keep cities cool and reduce pollution. [2] We are currently pursuing a national campaign called the 202020 vision (www.202020vision.com.au) to increase Australian urban green space by 20% by 2020. This collaborative project brings together partners across government, community and business sectors in order to champion this initiative. Some of the organisations that support this campaign include:

- Councils and State Governments - e.g. City of Melbourne, NSW Government
- Developers and asset managers - e.g. Brookfield Multiplex and Frasers
- Community and non for profits - e.g. Green Building Council, Royal Botanical Gardens and small grass roots organisations like Touched by Olivia Foundation which aims to provide inclusive playgrounds
- Commercial/business sector - e.g. BUPA, Go Get and Medibank Private,

These organisations have committed to support the 202020 Vision and are leading the way in creating a sustainable future for all Australians to enjoy.

In promoting the value and benefits of greenlife to the community we are also working to improve the competitiveness and profitability of our sector. We are focused on innovation, looking for growth

[2] 202020 Vision in an initiative of the Nursery & Garden Industry Australia to achieve 20% more greenlife in urban environments by 2020. For more information visit www.202020vision.com.au

opportunities, investing in research and technology development and working to ensure we have sufficiently trained human resources to continue to build the capacity of the industry.

Additionally, our best practice management guidelines, accreditation and certification programs work to minimise the impact of nursery operations on the surrounding environment as well as minimise and manage biosecurity risks to plants, animals and humans.

Section 2 - Nursery industry priorities

The top three information needs for the Australian nursery industry are:

1. A classification of businesses contributing data into collection surveys on the business type: We would like to ascertain if they are a:
    - ***Greenlife Producer*** – an organisation that grow tube stock and/or plants, sold to another business. Purchasers of their product could include production nurseries, government, landscapers, retailers etc.
    - ***Greenlife Broker/Reseller*** – an organisation who onsell plants without adding value to the plant, however apply a mark-up. Identifying resellers and brokers allows us to more accurately measure the industry by not counting plant values more than once.
2. Total sales receipts by classification in point 1 above.
3. Total annual full time equivalent (FTE) employees.

Through the nursery industry's own data collection program which is discussed in more detail below, NGIA is seeking to capture the above three priorities. The number of participants in this program has increased overtime however at its current participation level and without the knowledge of which organisations participated; this data is viewed with caution.

Conversely, while the ABS data captures total receipts in surveys, variation in figures across different agencies and across boarders renders this data doubtful. An example of this is provided below.

As an industry we find that voluntary programs do not achieve the required level of participation to ensure we have captured a significant percentage of the greenlife market. It is for this reason we are looking towards a compulsory survey via the ABS.

Section 3 - Critical statistical assets and challenges to accessing statistical information

We have responded to these questions jointly to provide an overall picture of both assets critical to our program but also the challenges surrounding those assets and how this impacts the nursery industry.

The nursery industry currently sources statistical information through a number of sources. However, we are not confident in the figures provided by many of these sources. Allowing for a margin of error between these sources, they often report results with significant differences. As a result of this, the nursery industry commissioned our own research project to establish a credibly sourced picture of the industry. This project has had its own difficulties which are discussed below.

- Nursery industry commissioned research

  The nursery industry has previously conducted user funded surveys with the ABS to capture information on the industry. The last user funded survey was conducted for data ending 30 June 1997. A copy of this survey is attached for your reference at Appendix A.

  Between 1997 and 2010 the nursery industry contracted a researcher who published a six monthly report titled the Garden Market Monitor. This report captured information from various sources including ABS and industry sampling and extrapolated the data to illustrate an overall picture of the industry. This included commentary on economic indicators, the retail garden environment, the production environment and growth drivers. Over time, nursery industry stakeholders lost confidence in the monitor citing uncertainty over the accuracy of the various data sources such as ABS but also concern in relation to the number and type of organisations contributing to the report.

  Industry became aware that the researchers were utilising ABS data, and ABS were using the same data as a source for their reports i.e a closed loop with little external input.

  In response to the need for accurate industry information, the Nursery industry commenced a market data project in 2011 to accurately map the industry, collect data from common points and engage a significant percentage of participants in the greenlife market, in an effort to obtain reliable data. Data requested included the industries top three data priorities outlined above for the financial years 11/12 and 12/13This project is ongoing and preliminary figures are currently being considered for the 2013-2014 financial year.

  The primary challenges faced by the industry in commissioning its own research include:

  - Whether the businesses are actually collecting the data being requested
  - Concern over data privacy and security
  - Industry operators don’t understand the need to contribute to industry data or how the information will benefit the industry or their business (we offered reporting back to contributors detailing the position of their business in relation to the averages in their classification both for their state and nationally).
  - Not wanting to be identifiable within the figures (this was managed by our third party and it was communicated that identifiable data would not be reported, however the fear remained)
  - Time
  - Accessibility of the most appropriate person

- Other statistical data accessed.

  - The nursery industry is currently considering the benefits of sourcing growing media data and controlled release fertiliser (CRF) data. This information will assist with industry predictions and trends and in ascertaining the confidence of growers. Discussions needed to undertake this collection are in progress and this information is provided on a good will basis.

- To assess contraction or growth of industry, understand employment figures and size (Ha) of production, the industry considers results from ABS & ABARES censuses and surveys including the reports released and also through ABS's Table Builder facility. We also access other agency data including:
    - The **Levies Revenue Service (LRS)** collect the nursery products levy on behalf of industry and where it is invested and managed by HAL. The levy is currently set at 5% of the wholesale value of the container. As an industry the levy receipts provide basic trending data. The limitations of this data are that levy payers are not identifiable and the type of container is unknown. Both these details would enhance this information as it would give an insight into the market share of operators and where in the value chain the intended product sits
    - The **Australia Tax Office ATO)** taxation statistics. The ATO uses the same ANZIC classification as the ABS. There is often a delay in the release of these figures. The most recent figures available are for the financial year 2010-2011.
    - Queensland Lifestyle Horticulture Industry Survey report of July 2011[3]. This was conducted by the **QLD Department of Employment, Economic Development & Innovation**. To our knowledge this is the most intensive State agency survey conducted. A comparison of this data is detailed in example 2 below

  Of concern is the variation in the figures that are reported and how relevant businesses are captured. This is despite giving consideration to the variation from different financial years and guidelines within which the reports are published such as definitions, exclusions and inclusions.

Section 4 - Examples causing concern in the nursery industry

Below are five examples for consideration that illustrate the above discussion.

Example 1 – Count of Agricultural Businesses for Nursery & Floriculture Production

NGIA conducted a search for number of agriculture businesses for the subdivision of nursery/floriculture with both the ATO (see Table 1) and ABS (see Table 2) The variation in the results are concerning, suggesting inadequacies in data collection and assumptions The ATO taxation statistics indicate 2250 businesses within nursery and floriculture production however the ABS statistics indicate 1794 for one year later.

[3] http://www.landscapequeensland.com.au/files/ddxxyecwfa/Lifestyle-Horticulture-Survey-Report---July-2011.pdf

Table 1 10/11 Taxation Statistics for Division Agriculture, Subdivision Nursery & Floriculture Production[4]

Taxation Statistics 2010-11 (most current information available)
http://www.ato.gov.au/content/00345977.htm?alias=taxstats
Division: Agriculture, forestry, fishing Subdivision: Nursery and floriculture production

	Total No. of	No. of	Total income (PP & NPP)	No. of	Net business income or loss (PP & NPP)
Trust returns	500	405	340,744,785	430	17,292,676
Company tax returns	575	535	616,838,347	na	na
Partnership returns	1175	1050	182,439,314	1105	20,129,971
Personal tax	2190	na	na	955	6,445,630
Total entities	**4440**		**1,140,022,446**		**43,868,277**

Table 2 Value of Agricultural Commodities Produced, Australia 2011/2012[5]

75030DO002_201112 Value of Agricultural Commodities Produced, Australia, 2011-12
Released at 11:30 am (Canberra time) Fri 31 May 2013
Table 1 Value of Agricultural Commodities Produced, Australia, 2011-12
http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/7121.02011-12?OpenDocument

Nurseries, cut flowers and cultivated turf	Gross Value $m	Local Value $m	Land Estimate	Number of ag businesses
Cultivated turf	218.6	218.4	6,606(ha)	275
Nurseries undercover	188.3	169.5	3,887,378(m2)	1,116
Nurseries outdoor	514.4	462.9	4,295(ha)	1,418
Nurseries - Total	**702.7**	**632.4**	**4,684 (ha)**	**1,794**
Cut flowers undercover	169.8	152.8	4,129,963(m2)	360
Cut flowers outdoor	180.4	162.4	4,675(ha)	856
Cut flowers - Total	350.2	315.2	5,088(ha)	982
Nurseries and cut flowers and cultivated turf - Total	**1,271.5**	**1,166.0**	16,378	2,918

Noting a 12 month difference between the data sets, further investigation was made to the ABS Counts of Australian Businesses including entries and exits (CABEE Collection) (See Table 3).

2011/2012 data sets were not yet available in this collection and so 09/10 and 10/11 were compared. This indicates a variation in businesses across the two years totalling 79. It also indicates less than 900 businesses were operating in this subdivision which is a significant difference to the 1794 and 2250 reported in the other data sets.

Table 3 **Counts of Australian Businesses including entries and exits (CABEE Collection)**[6]**.**

CABEE Collection		*2009/2010*		*2010/2011*	
		Start	*End*	*Start*	*End*
0111	Nursery Production (Under Cover)	182	177	177	168
0112	Nursery Production (Outdoors)	271	264	264	254
0113	Turf Growing	171	162	162	165
0114	Floriculture Production (Under Cover)	50	52	52	42
0115	Floriculture Production (Outdoors)	222	221	221	208
TOTAL		**896**	**876**	**876**	**837**

4 http://www.ato.gov.au/content/00345977.htm?alias=taxstats as at 26 June 2013
5 http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/7121.02011-12?OpenDocument as at 26 June 2013
6 http://www.ausstats.abs.gov.au/ausstats/subscriber.nsf/0/3501C8DDF770CC94CA2579950012015F/$File/81650_jun%202007%20to%20jun%202011.pdf

Example 2 – Industry Turnover

The Queensland Lifestyle Horticulture Industry Survey report of July 2011 was conducted by the Queensland Department of Employment, Economic Development & Innovation. For the first time in a number of years, the nursery industry had the opportunity to compare turnover reported in ABS statistics as compared to a single state.

The Queensland Lifestyle Horticulture Industry Survey report of July 2011 reported $1208.2 million (see Figure 1). The 2007-2008 ABS Value of Agricultural Commodities Produced for QLD reports $342.0 million (see Figure 2). For same time period, the difference in these figures is circa $866 million.

Table 1: Summary of whole-of-industry estimates

	Gross turnover ($ million)
Production	
Nursery	797.3
Turf	159.7
Cut flower	151.3
Total production	**1108.2**
Services	
Retail nursery	534.9
Florist	60.0
Landscape design and architecture	324.3
Landscape construction	1280.1
Garden and lawn maintenance	690.0
Horticulture consultant	9.8
Arboriculture	299.2
Indoor plant hire	82.0
Total services	**3280.4**
Estimated total industry	**4388.5**

Figure 1 Summary of whole of industry estimates, Queensland lifestyle horticulture industry survey report July 2011. Survey period 2007-2008.

2 GROSS VALUE OF AGRICULTURAL COMMODITIES PRODUCED—Year en

	AUST.			2008				
	2006	2007	2008	NSW	Vic.	Qld	SA	WA
	$m	$m	$m	$m	$m	$m	$m	$m
Crops								
Cereals for grain								
Wheat	5 099.2	2 618.5	5 291.9	888.7	687.6	353.4	934.4	2 418.0
Oats	248.7	180.5	422.5	60.8	107.3	^ 4.4	^ 38.4	208.8
Barley	1 417.4	1 038.9	2 244.0	276.7	563.6	44.0	476.9	874.6
Sorghum	276.0	273.7	977.4	339.6	—	637.2	*—	**0.5
Rice	273.7	^ 55.0	7.3	7.3	—	—	—	—
Other(a)	279.0	241.0	na	na	na	na	na	na
Cotton(b)	933.3	506.7	227.3	148.0	—	79.2	—	—
Fruit and nuts (excluding grapes)	2 626.9	3 499.2	2 757.5	478.0	688.8	^ 1 060.3	249.3	173.8
Grapes	1 377.5	1 137.8	1 693.6	342.1	398.1	32.8	762.8	124.1
Hay(c)	1 450.7	1 618.6	2 817.9	671.9	1 327.4	201.4	187.1	353.2
Legumes for grain(a)								
Lupins	251.1	124.9	221.5	^ 13.7	^ 14.0	**0.6	23.6	169.3
Other(a)	406.4	254.3	na	na	na	na	na	na
Nursery production	1 418.0	1 447.9	1 432.8	274.2	^ 527.7	^ 342.0	68.2	166.7
Oilseeds								
Canola	473.4	227.2	658.6	44.4	125.9	**0.2	84.3	403.2
Other(a)	54.7	^ 19.9	na	na	na	na	na	na
Sugar cane for								

Figure 2 Gross value of agricultural commodities produced, Australian Bureau of Statistics 2007-2008

Example 3 – Capture of Relevant Businesses

ABS draw their data from the same Business Activity Codes/ANZIC Classifications used by the ATO. For nursery, it is at this first point where there is a known risk whereby business won't be captured. For example, when establishing a business or reporting for tax purposes a nursery business has the option to select the following two categories

- *Agriculture, Forestry and Fishing: Nursery Production* OR
- *Wholesale Trade: Nursery Stock* or *Trees or shrubs, potted wholesale*.

The industry wants to be certain that all greenlife producers trading as wholesalers are being counted in the agricultural figures. How this is done has not yet been made clear to the industry.

For example, are wholesale trade statistics for the Division 'Agricultural produce wholesaling' for *Nursery Stock* or *Trees & Shrubs, potted wholesale* included in the agricultural statistics? If so, given the Business Activity Code /ANZIC code for these two classifications (33190) is the same as '*landscape supplies wholesaling'* and '*seed wholesaling,'* how are the figures calculated for incorporating into the overall agriculture (horticulture, nursery) statistics?

For official communication regarding the nursery products levy, NGIA requests access to the address information of organisations paying a levy. Access is for single use only and confidentiality agreements are required between NGIA and the list provider to obtain the information. While we are unable to use this information in any other format, it provides a rare glimpse into the industry. After excluding non-relevant levy payers we can see that the businesses being counted in the Nursery & Floriculture subdivision do not correlate to the number of relevant levy paying businesses reinforcing for the nursery industry the discrepancies in data.

Example 4 – Biosecurity Incursion 'Myrtle Rust'

It is necessary that statistical representation of the nursery industry is accurate. Without accurate data coupled with the basic understanding of what the nursery industry contributes to the economy neither the industry nor government can justify an appropriate investment in the management of biosecurity risks.

Myrtle Rust is a disease that affects the Myrtaceae Family - some of the most popular and iconic varieties of trees and shrubs of Australia. For example, 43% of the trees in the City of Melbourne belong to the Myrtaceae Family.[7] This fungus first appeared in Australia in 2010 and has the potential to infect Myrtaceous plants in Australian National Parks and World Heritage Listed Rainforests. Furthermore, it can destroy the habitat for our native fauna and may reduce timber production with flow on effects that may further impact housing and construction, effect employment and subsequently the economy.

Since it was first detected in 2010, government investment in the eradication and management of Myrtle Rust has been approximately $7.7 million. Nursery & Garden Industry Queensland estimates a loss of over $9 million dollars per year due to lost stock, additional treatment and labour, cancelled orders, trade restrictions and more.

Example 5 – Timeliness

Timeliness should be addressed on two fronts.

While it has improved, the time lag for the release of data needs to be addressed. For agriculture, horticulture and specifically the nursery industry, the delay in data releases make responding to industry issues such as drought or biosecurity incursions a difficult prospect. To our knowledge the current figures relate ABS and ATO relate to 2010-2011.

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[7] http://www.google.com.au/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CCsQFjAA&url=http%3A%2F%2Fwww.melbourne.vic.gov.au%2FSustainability%2FUrbanForest%2FDocuments%2FUrban_Forest_Diversity_Guidelines.doc&ei=pwn8Up_SH8emkQWZ5oCgCg&usg=AFQjCNGFhxEXTACSgLfqyegW0dGdsLmYeA&bvm=bv.61190604,d.dGI page 8 at 13 February 2014

As an example, assuming data from these organisations was considered accurate; it is in these figures industry and government could consider the impact of the Myrtle Rust incursion in 2010. Two and half years on, it is no longer useful to aide strategy or investment by industry or government in response to this biosecurity issue and can only serve to manage the risks of future incursions.

Secondly, on 26 August 2013 the nursery industry requested a quote from the ABS for a user funded survey which was based on the format of the user funded survey conducted by ABS on behalf of the nursery industry in 1997. At the time of writing this submission, we are yet to receive a quotation for this consultancy.

Section 5 - Recommendations to improve efficiencies

The following suggestions are made in the interests of improving the statistical representation of agriculture, horticulture and in particular the nursery industry.

Industry Liaison Officers

So often, finding the correct liaison within the various agencies becomes the first difficult task when working to achieve better representation for industry. The experience of the nursery industry is that the same information and explanations were provided to five or six different people within the ABS as described in Example 5 above.

An Industry Liaison Officer skilled within a particular field (in our case horticulture) would be able to easily understand the requirements of an industry or group of similar industries and represent their needs to the appropriate people. As an appointee operating on a united-agency platform they would utilise a pull strategy to extract the necessary information from the industries.

Regular industry liaison would:

- Guarantee the best survey questions are asked and not necessary *more* survey questions.
- Reduce current departmental liaison with industry by eliminating repetitive transfer of information. It will also reduce time and frustration of industry to communicate the needs to multiple agencies.
- Keep agencies abreast of industry changes as they happen.
- Demonstrate a desire by the departments to deliver relevant and accurate statistical data by working to extract the information from the industry.
- Ultimately result in better representation of industry and more reliable data to form policy and structure investment.
- Promote stronger relationships between the agencies and the industries.

Agency driven industry education

For the most part, the nursery industry takes responsibility for educating its stakeholders about the need for statistical data and the benefits of the information to them, their industry, the community and to government. Despite these campaigns, industry continues to be met with challenges of capturing data.

It would be appropriate that where an industry is communicating the needs and benefits of capturing data that it should be complimented by an Agency supported education program. Agency support could be in the support of delivering a short workshop to industry stakeholders, co-branded information material or participating at industry events and conferences.

Additionally, in requesting survey participation from the agricultural contributors (whether compulsory or not), for the nursery industry as least, providing information on how the information will be used could deliver greater participation rates (including completed questionnaires) and result in more accurate data.

<u>Statistics Bank</u>

A central point for all research to be held would provide a timely solution for all industries seeking data. An online bank requiring registration and password entry could allow industry representatives to sort and save relevant research and reports. It would also provide agencies with information on who, what, where, when information is being access and provide valuable insights for the departments into the users of such information.

The bank would reduce administrative support by the departments to the industries allowing them to focus on projects with greater priority.

A statistics bank would be a useful tool for an Industry Liaison Officer also.

<u>Multi-agency statistical review</u>

An overall review of the how the different agencies involved in data collection impact each other is essential. For horticulture, such departments would include ABS, ABARES, ATO and State DPI's.

Additionally, a common language for reporting would be extremely beneficial. If the various organisations used the same guidelines for reporting including the same definitions, inclusions and exclusions, there would be less opportunity for discrepancies across departmental data.

<u>Administration efficiency</u>

Improvements in processing requests and accessing data need to be made. Accessing data from ABS is a lengthy process. On two occasions that the nursery industry has requested data from the ABS, it has taken multiple months to process. Please refer to Example 5 above for more information. If timeliness cannot be improved, then it would be appropriate that Industry would benefit from understanding why requests take some time to process.

Conclusion

The current data available on the nursery industry is difficult to interpret, is contradictory across both intra and inter agency reports. It is often a long and repetitive process to action such information and when the data lacks credibility, then the effort to obtain and interpret the information cannot be justified by a non-profit industry organisation.

Implementing some of the above suggestions would contribute significantly to an alignment of data and allow both the agricultural and the horticultural sectors to adequately represent themselves confidently.

Additionally, having basic statistical priorities supported by the various agencies would provide Industry with opportunity to invest in research to specifically examine priorities areas. Industry research would subsequently be contributed to the *statistics bank.*

As raised in the introduction above, the community is becoming more aware of the benefits of greenlife and both government and the corporate sector recognise greenlife can significantly impact their triple bottom line. For this reason, it is essential data on greenlife production and its value to the community over time is measured and available in a timely manner so all sectors incorporating greenlife into their operational structures assess the benefits of greenlife holistically.

It is also necessary for the accurate representation of agriculture, horticulture and the nursery industry and importantly will significantly contribute to the statistical goals for Australian agriculture.

More Information

For more information on the Australia nursery and garden industry please visit www.ngia.com.au.

The contributors to this submission would be happy to assist you with any questions you have regarding the nursery industry or this submission if requested.

Submission Authorisation

This submission is made on behalf of the Australian nursery industry by Robert Prince, CEO of Nursery & Garden Industry Australia.

Robert Prince

Chief Executive Officer

Nursery & Garden Industry Australia

14/02/2014

Appendix A

Australian Bureau of Statistics

Nursery, Cut Flower, Florist, Hiring of Plants and Turf Statistics 1997

▼ In correspondence, please quote this number

Please correct any errors on this label ▶

Duplicate
Please keep this copy
for your records

Purpose of Collection

This form collects information supplementary to that collected by the Agricultural Census and the periodic Surveys of Wholesale and Retail Establishments. It seeks information on all the activities associated with the nursery, cut flower and florist, and turf growing operations of this establishment.

The information you supply assists both government and industry organisations concerned with the analysis and future development of nursery, cut flower, florist, plant hire and turf industries.

Collection Authority

The information asked for is collected under the authority of the *Census and Statistics Act, 1905*. Your co-operation is sought in completing and returning this form by the due date. The Act provides me with the power, if needed, to direct you to provide the information sought.

Confidentiality

Your completed form remains confidential to the Australian Bureau of Statistics.

Due Date

Please complete this form and return it in the reply paid envelope to the Australian Bureau of Statistics **within 14 days of receipt**.

Help Available

If you have problems in completing this form, or feel that you may have difficulties meeting the due date, please contact the Australian Bureau of Statistics by:

Telephone – **1800 647011**
Facsimile – **(03) 6222 5946**
Mail – **GPO Box 66A, Hobart 7001**

W. McLennan
Australian Statistician

Person we should contact if any queries arise regarding this form

Name	
Signature	

Telephone Number	( )
Facsimile Number	( )
Date	/ /

Question 1 – Did you engage in any production or growing activities (excluding cut flowers and cultivated turf) during the year ended 30 June 1997?

Yes ☐

No ☐ ▶ Go to **Question 2**

1a Gross receipts from sales of plant material (excluding cut flowers and turf), grown or grown on – Sold to:

	Gross receipts from sales	22
A. Other nurseries for growing on	$	605A
B. Retailers		
Chain stores (including supermarkets and hardware stores)	$	602V
Garden centres (including retail nurseries)	$	603W
Other retail stores	$	601R
C. Wholesale markets and cash and carry operations	$	606C
D. Landscapers/plantscapers	$	607F
E. Home gardeners	$	608J
F. Re-vegetation projects/farmers/Greening Australia	$	609K
G. Production horticulture (e.g. flower growers, orchardists etc.)	$	610V
Total	$	612X

Question 2 – Did you purchase any plant material for on-sale without any significant value adding during the year ended 30 June 1997?

Yes ☐

No ☐ ▶ Go to **Question 3**

2a Gross receipts from sales of plant material (excluding cut flowers and turf) purchased and on-sold, without significant value adding – Sold to:

	Gross receipts from sales	22
A. Other nurseries for growing on	$	615F
B. Retailers		
Chain stores (including supermarkets and hardware stores)	$	616J
Garden centres (including retail nurseries)	$	617K
Other retail stores	$	619R
C. Wholesale markets and cash and carry operations	$	620X
D. Landscapers/plantscapers	$	621A
E. Home gardeners	$	622C
F. Re-vegetation projects/farmers/Greening Australia	$	623F
G. Production horticulture (e.g. flower growers, orchardists etc.)	$	624J
Total	$	626L

Question 3 – Did you sell any cut flowers and foliage, cultivated turf or items other than plant material during the year ended 30 June 1997?

Yes ☐ ▶

No ☐ Go to **Question 4**

3a Gross receipts from sales of other products not included in Questions 1 and 2.

	Gross receipts from sales	22
A. Cut flowers and foliage (including dried flowers and arrangements)	$	630C
B. Artificial flowers and plants	$	631F
C. Cultivated turf	$	632J
D. Garden accessories		
Pots and other containers	$	633K
Features (e.g. gnomes, statues, fountains, glasshouses)	$	634L
Fertilisers		
Controlled release	$	635R
Other	$	636T
Garden maintenance and design services	$	637V
Irrigation equipment	$	638W
Other landscaping supplies, e.g. pavers, pine bark, mulches and compost	$	639X
Pesticides and herbicides	$	640J
Potting media		
Potting media in bulk	$	641K
Potting media in bags	$	642L
Shade cloth and weed mats	$	643R
Soil	$	644T
Tools		
Hand tools (e.g. shovels, spades, forks, secateurs, etc.)	$	645V
Other tools (e.g. mulchers, lawn edgers, vacuum blowers etc.)	$	646W
Other garden accessories (please specify e.g. books, gloves, stakes, wire products)	$	647X
E. PBR/PVR licences and royalties	$	648A
Total	$	649C

Question 4 – Did this establishment engage in any production or growing activities during the year ended 30 June 1997?

Yes ☐
No ☐ ▶ Go to **Question 7**

	Gross receipts from sales	22
4a Gross receipts from sales of plant material (excluding cut flowers and turf)		
A. In ground/bare rooted	$	650L
B. Seeds	$	651R
C. Bulbs (including corms)	$	652T
D. Pots less than 76mm (seedlings, tubes, cells, punnets, plugs and tissue cultures)		
Bedding plants	$	653V
Vegetables (include herb seedlings)	$	654W
Houseplants	$	655X
Palms and ferns (including natives)	$	656A
Native trees and shrubs	$	657C
Exotic trees and shrubs	$	658F
E. Pots 76mm to 300mm		
Roses	$	659J
Potted colour	$	660T
Houseplants	$	661V
Palms and ferns (including natives)	$	662W
Native trees and shrubs	$	663X
Fruit trees and vines	$	664A
Other exotic trees and shrubs	$	665C
F. Pots greater than 300mm and large plants in bags		
Houseplants	$	666F
Palms and ferns (including natives)	$	667J
Native trees and shrubs	$	668K
Fruit trees and vines	$	669L
Other exotic trees and shrub	$	670W
G. Other plant material not included above(please specify) ☐	$	671X
Total gross receipts from sales	$	675J

4b Percentage of sales of ornamental plants by the following groups	Estimated % of sales	22
Australian natives	%	676K
Other	%	677L
4c Percentage of sales of plant material to the following destinations		
Within this State	%	678R
Interstate	%	679T
Overseas	%	680A

4d Area of land used for growing activities (excluding cut flower and turf growing) during the year ended 30 June 1997

Note
- Even if an area was used more than once during the year, report the area only once.

		22
Area of growing/growing-on activity carried out in:		
Shadehouses	Square metres	681C
Greenhouses/polythene tunnel houses	Square metres	682F
Open space	Hectares	683J

Question 5 – Did this establishment grow any cut flowers during the year ended 30 June 1997?

Yes ☐

No ☐ Go to **Question 6**

5a Cut flower activity during the year ended 30 June 1997

Note
- Where an area was used more than once during the year, report for each time that it was used.

Exclude
- Flowers collected from the wild

		22
Area of cut flower growing/growing-on activity carried out in:		
Shadehouses	Square metres	685L
Greenhouses/polythene tunnel houses	Square metres	686R
Open space	Hectares	687T

Question 6 – Did this establishment grow any cultivated turf during the year ended 30 June 1997?

Yes ☐

No ☐ Go to **Question 7**

6a Turf activity during the year ended 30 June 1997

	Area grown Hectares	22
Total area of land used for growing cultivated turf		690F

Cultivated turf cut for sale

Note
- Where an area was used more than once during the year, report for each time that it was used.

	Area cut Hectares	
		691J

Question 7 – Did this establishment hire out and/or maintain plants in pots under contract during the year ended 30 June 1997?

Yes ☐

No ☐ Go to **Question 8**

7a Hiring and maintenance of plants in pots during year ended 30 June 1997

	Number	22
Total number of plants (in pots 250mm or larger) hired out or maintained		695T
Total number of maintenance contracts during the year ended 30 June 1997		696V
	Purchases	
Cost of plants purchased for plant hire during the year ended 30 June 1997	$	697W
	Gross receipts	
Total gross receipts from plant hire and maintenance	$	698X

Capital and current expenditure

8 Acquisition of selected assets by this establishment during the year ended 30 June 1997

Include
- Plant, machinery and equipment (including motor vehicles)
- Land
- Dwellings
- Computer technology
- Other buildings and structures
- Intangible assets (such as patents, licences and goodwill)
- All costs capitalised in your books (including legal fees, real estate transfer costs and assets acquired under finance leases)
- Progress payments made to contractors for capital work done by them

Exclude
- Interest paid
- Financial assets (such as shares)

	Capital expenditure	**22**
Land, dwellings, other buildings and structures	$	700X
Plant, machinery and equipment	$	701A
Intangible assets	$	702C
Total	$	703F

9 Current expenditure on inputs for production or growing activities (excluding cut flowers, cultivated turf and hiring and maintenance of plants) during the year ended 30 June 1997 on the following items.

	Current expenditure	**22**
Pots and other containers	$	705K
Labels	$	706L
Packaging materials	$	707R
Inward freight and cartage	$	708T
Water (including rates, licences and pumping costs)	$	709V
Heating (including fuel and electricity)	$	710C
Marketing and promotion	$	711F
Potting media	$	712J
Fertilisers – controlled release	$	713K
– others	$	714L
Plant protection chemicals	$	715R
Other inputs	$	716T
Total current expenditure	$	718W

Employment

10 Persons who worked for this establishment during the last pay period of each month during the year ended 30 June 1997

Include
- Full-time and part-time employees
- Permanent, temporary and casual employees
- Managerial and executive employees
- Employees absent on paid or prepaid leave
- Working proprietors and partners
- Employees on workers' compensation who continued to be paid through the payroll

Exclude
- Non-salaried directors
- Self employed persons such as consultants, contractors and persons paid solely by commission without a retainer
- Volunteers

	Working proprietors and partners Number	Permanent full-time employees Number	Seasonal, casual or part-time employees Number	22
1996				
July				720J
August				721K
September				722L
October				723R
November				724T
December				725V
1997				
January				726W
February				727X
March				728A
April				729C
May				730L
June				731R

11 Estimated percentage of time spent by all persons on the following activities (including working proprietors and partners) during the year ended 30 June 1997

	Estimated percentage of time spent	22
Administration	%	735X
Marketing	%	736A
Production (growing)		
Plant material	%	738F
Cut flowers	%	739J
Cultivated turf	%	740T
Wholesaling (include selling to retailers)	%	741V
Retailing	%	742W
Hiring of plants	%	743X
Other (please specify)	%	744A
Total	**100 %**	

Question 12 – Did this establishment pay any wages or salaries during the year ended 30 June 1997?

Yes ☐

No ☐ ▶ Go to **Question 13**

12a Wages and salaries including provision expenses for employee entitlements

Note
- Refers to gross earnings before taxation and other deductions.
- Report wages and salaries as recorded in this business' profit and loss statement.

Include
- Severance, termination, and redundancy payments
- Wages or salaries paid to all full-time and part-time employees
- Wages or salaries paid to all permanent, temporary and casual employees
- Salaries and fees of directors and executives
- Overtime earnings, penalty payments and shift allowances
- Retainers and commissions paid to persons who received a retainer
- Payments made under incentive or profit sharing schemes
- Amounts paid through the payroll to employees on workers' compensation
- Bonuses

Exclude
- Non-salaried directors
- Drawings from profits
- Payments to self-employed persons such as consultants, contractors and persons paid solely by commission without a retainer
- Payments to proprietors/partners of unincorporated businesses
- Reimbursements or allowances to employees for travel, entertainment, etc.
- Payroll tax and fringe benefit tax

22

Wages and salaries paid during year ended 30 June 1997 ... ... $ ______ 746F

Comments

13 Please provide an estimate of the time taken to complete this form

Include
- The time actually spent reading the instructions, working on the questions, and obtaining the information
- The time spent by all employees in collecting and providing this information

88

______ hr ______ min 018K

14 Please provide comments on any circumstances which affected this establishment in 1996-97 (e.g. consumer preferences, market fluctuations etc.)

15 Please provide comments

– on any of the information you have supplied on this form
– on any questions which caused problems
– if you would like to suggest improvements to this form

Thank you for completing this form

National Agricultural Statistics Review (NASR)

Comment on preliminary findings

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Date: 15 May 2014

Contents

Introduction

Many of the issues raised by Nursery & Garden Industry Australia in the first submission to the National Agricultural Statistics Review (NASR) have been acknowledged in the preliminary findings report. As specified in our submission, and now in the view of the NASR, considerable attention needs to be given to data quality.

It is evidenced in the preliminary findings that the top 10 statistical assets are produced by ABS and ABARES indicating reliance by stakeholders, and particularly government, to incorporate this data into policy and investment decisions that affect industry. This point emphasizes the ongoing need for the NASR to continue its work good work in this review.

NGIA attended the NASR Stakeholder Forum in Sydney on 9 May 2014 and many of the Nursery Industry's additional comments were heard at this forum. This response to the preliminary findings of the NASR reinforce points made by the stakeholders at that meeting.

Data quality dimensions

The theory behind the seven dimensions for data quality certainly takes into account many areas of concerns by the nursery industry.

In our case, burden is placed on greenlife growers to provide data not only by government agencies but from industry also. If the management of these dimensions is effective then there is scope for the process to reduce respondent burden. If successful, other benefits may be seen in increased survey participation and in the collection of honest data.

NGIA's first submission outlined concerns relating to all seven of the dimensions. In relation to Institutional environment, coherence and accessibility we made the following suggestions:

Industry Liaison
(institutional environment, accuracy, accessibility)

While the institutional environment also reflects the financial, infrastructure, technological resources of the agency producing the data, it also specifically noted *staff*.

The mechanism for both industry and statistical agencies to have regular liaison is missing. Appropriately skilled representation and easily accessible contact points within the data collection agencies has the potential to:

- Ensure relevant survey questioning and not necessarily *more*. This will decrease survey length and frequency.
- Keep agencies abreast of industry changes as they happen allowing opportunity to respond in a timely manner.
- Eliminate repetitive transfer of information.

- Provide insight in to the data that has been collected rather than reporting 'a statement of fact'. For example, turnover in X State decreased by 10% OR turnover in X State decreased by 10% due to X biosecurity outbreak which caused stock to be destroyed.

Statistics Bank
(institutional environment, accuracy, timeliness, interpretability)

A single location for all agricultural research will greatly improve accessibility of data by users. An effective online system would reduce administrative support currently provided by the departments allowing them to redirect much needed resources. It would contribute to quicker access to information and aide interpretation.

Multi-agency statistical review
(coherence, interpretation, timeliness)

An overall review of the how the different agencies involved in data collection impact each other is essential. For horticulture, such departments would include ABS, ABARES, ATO and State DPI's, private sector and would require input from industry.

A review of this nature should look towards the formulation of a common language for reporting and identify a core data set to assist in coherence and reducing discrepancies and ultimately respondent burden.

Opportunities

Many suggestions for innovation outlined in the preliminary report offer a bright future for the NASIS.

Industry Intelligence

One element that is extremely under-utilized throughout the statistical cycle is *industry intelligence*.

The majority of the phases of the cycle will benefit from input from industry, which at the very least will begin to rebuild industry confidence in the data being reported.

The preliminary report refers to the industry being consulted in the *data processing phase* and this is definitely a valuable data checking method. Industry should also be consulted in the *planning* and *content development* phases. Involvement here will give the agencies insight into industry seasonality and the data that is required for all stakeholders of industry. Understanding these things will improve relevance of the data for industry and contribute to improved response rates.

Capturing industry intelligence can be done with regular liaison.

Communication and education

The *dissemination phase* has a primary obligation to deliver the statistics to the intended **data users**. This phase is must also be viewed by the NASIS as a vehicle to improve response rates and data accuracy.

The requirement of organisations to participate in *compulsory surveying* in itself does not produce accurate data. In today's demanding business environment business owners expect more for investing their time.

If the NASIS is looking to improve accuracy of data and reduce respondent burden then the term **'data users'** when defined, must include those organisations who are **'survey respondents'**.

Viewing the survey respondents jointly as data users creates an opportunity for the NASIS to reciprocate the sharing of information. A gesture in return for data supply would reduce the *perception* of burden and encourage greater accuracy of information from respondents. It has the potential to create more data users who will require access to accurate information.

Educating survey respondents on how to make use of the reports (which they have contributed to) will assist with accuracy and shift the perception of burden by giving something of value back to the business.

In the first instance, communication and education support would not require a large investment. It could be as simple as a thank you email or a link to the report when released. Modifications to reporting that would help to educate respondents and require low investment could be as simple as a redesign of a report to be enticing to read, attractive to look at and incorporates tips for interpreting the information. Additionally, assistance to understand the data within the report could be provided via webinars or instructional videos.

To assist, industry could provide practical support by delivering a short workshop to industry stakeholders, co-branded information material could be arranged and agencies could participate (perhaps via an industry liaison representative) in industry events and conferences, jointly promoting the release of data.

Technology & Social Media

Collection agencies should consider the use of applications (Apps) for mobile devices to assist in the collection and sharing of data. Respondents may find it more convenient to use an App and consideration should be given to this and other non-traditional methods of capturing information.

Additionally, the use of specifically targeted social media to share survey links and promote the release of reports will increase awareness of the data collections and could also assist in the communication and education of survey respondents.

Coordination of stakeholder needs

Managing the needs of the various stakeholders of the NASIS must begin with ongoing understanding of what those needs are. Additionally, the roles of government agencies and industry in the collection of statistics should be better understood. This is acknowledged in the preliminary report.

The preliminary report indicates that the top 10 statistical assets used are provided by government agencies indicating reliance by those that submitted to the NASR on government agencies to provide data.

Some attendees at the Stakeholder Forum felt that the absence of data could be viewed as a market failure. For the Nursery Industry, there is a failure across agencies to deliver coherence in the data. When considering our case, which data set should we rely upon? Which data set is government working with to form policy or assess investment? The Nursery Industry is reliant upon agency data which is driven by a current inability to capture sound industry data. This also comes at a time when the need for data on greenlife is critical. This need is critical not only for our industry but for assisting government policy for example, the Direct Action Plan to plant 20 million trees.

Roles & Responsibilities

Understanding the roles and responsibilities of stakeholders in the capture and analysis of data is also critical.

Where government data collection agencies provide data that industry has *confidence* in, industry would be prepared to invest in the knowledge gaps and analysis of the data. This information could be shared (subject to privacy law) with ABS.

Confidence in data could be achieved with:

- regular liaison with industry bodies
- input into data collection methods and questions.
- Coherence across data sets
- Greater value delivered to survey respondents.

Collaboration

As outlined under innovation, industry intelligence is a valuable, under-utilized resource.

The Nursery Industry invites the collection agencies including ABS and ABARES to work collaboratively to improve data quality relating to the nursery industry.

Collaboration in a needs assessment will guide the planning and content development phases of the statistical cycle. The result should be more informed, less onerous surveying and capture of more accurate raw data.

Surveying - segmenting agricultural stakeholders

When considering how collectively, we can reduce respondent burden we should consider how surveying could be more targeted. The primary percentage of a survey could be dedicated to a core set of data which would meet the needs of the agriculture sector holistically and government.

In segmenting the survey respondents more specific action can be taken by both government and industry to address information gaps. This would allow both industry and the agencies to make contact with relevant organisations in a timely manner, assist with policy formulation and inform appropriate responses to emergent issues such as a biosecurity incursion or drought.

General Comment

Low response rate

Horticulture Australia Limited alone represents over 40 different horticultural industries. Compared to the Agricultural Competitive White Paper which received over 400 submissions, the response rate to the NASR is disappointing at only 37 submissions. How future reviews into the NASIS are communicated to stakeholders needs consideration in order to achieve a higher response rate.

Interpretation and low response rate

The first round submission process offered two formats for submission being, an excel spreadsheet (ranking) and/or a submission addressing a selection of questions.

When the preliminary report discusses whether ‘statistical assets’ have meet the needs of stakeholders, it informs us that where a ranking was not provided it was removed from that phase of analysis, as it should be. It does not share how many of those 37 submissions did not provide a ranking.

With a higher response rate this would not be so critical however, given the low number of submissions it does raise some concerns over the accuracy of the results reported. Using the above example, *“66 per cent of the assets were rated as having mostly or fully met their needs”*. In this case, it would be useful to know how many submissions were removed from the analysis to give this figure some perspective.

It is ironic that the NASR is in the position of low response rate, as this is a challenge the nursery industry faces in its own data collection projects.

More Information

For more information on the Australia nursery and garden industry please visit www.ngia.com.au.

The contributors to this submission would be happy to assist you with any questions you have regarding the nursery industry or this submission if requested.

Submission Authorisation

This submission is made on behalf of the Australian nursery industry by Robert Prince, CEO of Nursery & Garden Industry Australia.

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