

5. Results for the Horticultural Service Sectors

Horticultural service firms include those that provide a plethora of lawn and landscape design, installation (construction), and maintenance services. This section also includes definitions for each major industry sector within the horticultural services industry. These include *Landscape Services* (561730) and *Landscape Architectural Services* (541320), which are described in more detail below (Table 5-1).

Table 5-1. Specialties for Horticultural Service Firms.

Landscape Service Firms	
Arborist Services	Plant And Shrub Maintenance In Buildings
Cemetery Plot Care Services	Plant Maintenance Services
Fertilizing Lawns	Pruning Services, Ornamental Tree And Shrub
Garden Maintenance Services	Seasonal Property Maintenance Services (I.E., Snow Plowing)
Hydroseeding Services (e.g., Decorative, Erosion Control Purposes)	Seeding Lawns
Landscape Care And Maintenance Services	Shrub Services (e.g, Bracing, Planting, Pruning, Removal, Spraying)
Landscape Contractors (Except Construction)	Snow Plowing Services Combined With Landscaping Services
Landscape Installation Services	Sod Laying Services
Landscaping Services (Except Planning)	Spraying Lawns
Lawn Care Services (e.g., Fertilizing, Mowing, Seeding, Spraying)	Tree And Brush Trimming, Overhead Utility Line
Lawn Fertilizing Services	Tree Pruning Services
Lawn Maintenance Services	Tree Removal Services
Lawn Mowing Services	Tree Services (e.g., Bracing, Planting, Pruning, Removal, Spraying)
Lawn Seeding Services	Tree Surgery Services
Lawn Spraying Services	Tree Trimming Services
Line Slash (i.e., Rights Of Way) Maintenance Services	Tropical Plant Maintenance Services
Maintenance Of Plants And Shrubs In Buildings	Turf (Except Artificial) Installation Services
Mowing Services (e.g., Highway, Lawn, Road Strip)	Weed Control And Fertilizing Services (Except Crop)
Ornamental Tree And Shrub Services	
Landscape Architectural Service Firms	
Architects' Offices, Landscape	Landscape Architectural Services
Architects' Private Practices, Landscape	Landscape Consulting Services
Architectural Services, Landscape	Landscape Design Services
City Planning Services	Landscape Planning Services
Garden Planning Services	Ski Area Design Services
Golf Course Design Services	Ski Area Planning Services
Industrial Land Use Planning Services	Town Planners' Offices
Land Use Design Services	Town Planning Services
Land Use Planning Services	Urban Planners' Offices
Landscape Architects' Offices	Urban Planning Services
Landscape Architects' Private Practices	

Landscaping Services (561730). This industry sector comprises: (1) establishments primarily engaged in providing landscape care and maintenance services and/or installing trees, shrubs, plants, lawns, or gardens and (2) establishments primarily engaged in providing these services along with the design of landscape plans and/or the construction (i.e., installation) of walkways, retaining walls, decks, fences, ponds, and similar structures. As a cross-reference, firms in this sector do not include establishments primarily engaged in: installing artificial turf or in constructing or installing walkways, retaining walls, decks, fences, ponds, or similar structures, which are

classified in under Construction (Sector 23); planning and designing the development of land areas for projects, such as parks and other recreational areas; airports, highways, hospitals, schools, land subdivisions, and commercial, industrial, and residential areas (without also installing trees, shrubs, plants, lawns/gardens, walkways, retaining walls, decks, and similar items or structures), which are classified in, Landscape Architectural Services (541320); retailing landscaping materials and providing the installation and maintenance of these materials, which are classified under Nursery, Garden Center, and Farm Supply Stores (444220).

Landscape Architectural Services (541320). This industry sector is comprised of establishments primarily engaged in planning and designing the development of land areas for projects, such as parks and other recreational areas; airports; highways; hospitals; schools; land subdivisions; and commercial, industrial, and residential areas, by applying knowledge of land characteristics, location of buildings and structures, use of land areas, and design of landscape projects. Cross-references in the NAICS database do not include establishments primarily engaged in providing landscape care and maintenance services and/or installing trees, shrubs, plants, lawns, or gardens along with the design of landscape plans, which are classified under Landscaping Services (561730).

Sales, payroll, and employment data for the horticultural services sector are presented in Table 5-2. Within the total number of firms providing horticultural services (82,683), 93 percent are in the Landscape Services sector (76, 458 firms), with the remaining firms offering Landscape Architectural Services (6,225 firms). These sectors combined represent 32 percent of the total number of establishments included in the study. Although landscape service only represent roughly one-third of the number of establishments, they employ almost 51 percent of the total number of paid employees, with an annual payroll exceeding \$11.5 billion. Again, firms in the landscape service sector dominated the employment and payroll breakdown, representing 93 percent of the paid employees and 90 percent of the annual payroll. The \$38.8 Bn in sales for the landscape sector made up almost 27 percent of the total sales for all sectors included in the study (\$145.4 Bn), with landscape services firms and landscape architectural firms representing 91 percent and 9 percent, respectively.

Table 5-2. Sales and Employment in the U.S. Horticultural Services Sectors, 2002

Industry Sector	Establishments	Paid Employees	Annual Payroll (\$Mn)	Sales Receipts (\$Mn)
Landscaping Services	76,458	514,962	11,509	35,235
Landscape Architectural Services	6,225	36,679	1,330	3,569
Total Horticultural Services	82,683	551,641	12,839	38,804

Sources: 2002 Economic Census (US Census Bureau)

Table 5-3 presents estimates of the economic impacts of the horticultural services sectors in the U.S. In terms of output, the landscaping services sector represents 92 percent of total horticultural services industry output, whereas landscape architecture firms represent the remaining 8 percent. Additionally, landscaping service firms accounted for 93 percent of the persons employed in the horticultural services industry at \$11.5 Bn in labor income. The horticultural services industry as a whole also paid \$1.3 Bn in indirect business taxes, roughly 20 percent of that paid by all sectors included in the survey. In terms of value added, the horticultural services sectors contributed \$39 Bn, which was almost 41 percent of the total value added for all sectors in this study.

Table 5-3. Economic Impacts of the U.S. Horticultural Services Sectors, 2002

Industry Sector	Output Impacts (\$Mn)*	Employment (jobs)	Value Added (\$Mn)*	Labor Income (\$Mn)*	Indirect Business Taxes (\$Mn)*
Landscaping Services	52,971	704,875	35,564	27,719	1,312
Landscape Architecture	4,803	48,683	3,449	2,549	74
Total Horticultural Services	57,774	753,557	39,013	30,269	1,387

* Values expressed in 2004 dollars (GDP Implicit Price Deflator, US Dept. Commerce).

Landscaping Services

Tables 5-4 and 5-5 present the economic impacts of the landscape services and landscape architectural sectors by state, respectively. The top 5 states providing landscape services include (in rank order): California, Florida, Texas, Illinois, and Ohio with impacts ranging from \$8.3 Bn for California to \$2.2 Bn for Ohio. These top five states represent 38 percent of the national total, with combined impacts of a little over \$20 billion. The next five states in terms of importance are New Jersey, Pennsylvania, North Carolina, Virginia, and Maryland. The top 10 states combined represent 55 percent of the national economic impacts for landscape services, while the top 20 states account for 81 percent (\$42.8 Bn) of the national total.

In terms of the 704,875 jobs created by the landscape services sector nationally, the top five employment states (California, Florida, Texas, Ohio, and North Carolina) account for 280,562 of them, representing 40 percent of the national work force. Illinois, Virginia, Georgia, Pennsylvania, and Arizona are the next five highest employing states, adding another 119,335 jobs and, when combined with the top five states, represent 57 percent of the national workforce. Considering these top 10 states, along with the next 10 states, then the top 20 employing states account for 80 percent of the national workforce.

Landscape Architecture

The top five states providing landscape architectural services include (in rank order): California, Texas, Illinois, Florida, and Michigan with impacts ranging from \$1.1 Bn for California to \$236 Mn for Michigan. These top five states represent 46 percent of the national total, with combined impacts of a little over \$2.2 billion. The next five states in terms of importance are Massachusetts, Colorado, New York, Pennsylvania, and New Jersey. The top 10 states combined represent two-thirds (66 percent) of the national economic impacts for landscape services, while the top 20 states account for 86 percent (\$4.1 Bn) of the national total.

In terms of the 48,683 jobs created by the landscape services sector nationally, the top five employment states (California, Texas, Florida, Michigan, and Illinois) account for 21,904 of them, representing 45 percent of the national landscape architectural work force. Massachusetts, Pennsylvania, Colorado, New York, and North Carolina are the next 5 highest employing states, adding another 8,480 jobs and, when combined with the top five states, represent 62 percent of the national workforce. Considering these top 10 states, along with the next 10 states, then the top 20 employing states account for 84 percent of the national landscape architect workforce.

Table 5-4. Economic Impacts of the U.S. Landscaping Services Sector by State, 2002

Rank	State	Establishments	Employment	Annual Wages (\$Mn)*	Output (\$Mn)*	Output Impacts (\$Mn)*	Employment Impacts (jobs)	Value Added Impacts (\$Mn)*	Labor Income Impacts (\$Mn)*	Indirect Business Tax Impacts (\$Mn)*
	Total	76,458	514,962	11,978	36,670	52,971	704,875	35,564	27,719	1,312
1	California	7,271	86,446	1,790	5,480	8,269	115,134	5,644	4,523	215
2	Florida	6,308	45,096	843	2,580	3,801	59,935	2,562	2,045	98
3	Texas	3,617	36,772	726	2,223	3,179	47,435	2,086	1,675	80
4	Illinois	2,997	16,952	614	1,879	2,621	24,818	1,786	1,449	63
5	Ohio	3,431	22,854	537	1,644	2,248	30,400	1,479	1,200	48
6	New Jersey	3,568	16,163	462	1,414	1,982	21,878	1,354	1,095	49
7	Pennsylvania	3,488	18,960	490	1,501	1,909	23,589	1,300	1,067	41
8	North Carolina	2,620	17,939	337	1,033	1,803	27,658	1,173	910	53
9	Virginia	2,040	17,829	387	1,183	1,760	24,768	1,170	938	43
10	Maryland	1,598	13,940	344	1,054	1,720	21,702	1,166	929	45
11	New York	4,807	15,907	512	1,567	1,693	17,198	1,219	1,033	29
12	Georgia	2,268	18,886	392	1,199	1,664	24,250	1,127	910	41
13	Michigan	2,933	12,539	410	1,254	1,561	16,066	1,060	32	32
14	Massachusetts	2,468	9,515	350	1,070	1,558	14,659	1,062	858	39
15	Colorado	1,523	11,552	296	907	1,408	17,234	939	749	38
16	Arizona	1,373	15,461	281	860	1,393	21,970	929	733	39
17	Indiana	1,592	9,992	251	768	1,096	14,155	714	573	27
18	Washington	1,952	10,331	248	760	1,096	14,196	734	592	27
19	Connecticut	1,791	6,900	233	715	1,080	10,691	742	592	29
20	Wisconsin	1,475	6,829	213	653	957	10,765	633	508	24
21	South Carolina	1,306	8,900	163	499	933	14,770	606	420	29
22	Tennessee	1,193	8,913	194	593	910	12,865	603	477	24
23	Nevada	576	7,719	168	516	897	12,067	610	479	27
24	Minnesota	1,501	5,883	184	562	877	9,570	576	459	23
25	Missouri	1,468	8,936	202	619	676	9,667	450	380	11
26	Alabama	833	6,994	131	402	627	10,027	405	318	16
27	Oregon	1,079	6,324	143	439	602	8,436	406	329	14
28	Kansas	619	3,859	87	266	378	5,330	246	199	9
29	Kentucky	755	4,098	85	259	353	5,370	230	186	8
30	Iowa	658	3,134	76	233	306	4,158	199	162	7
31	Oklahoma	551	6,469	89	273	305	6,909	199	168	5
32	Utah	680	2,740	63	192	302	4,238	195	156	8
33	New Hampshire	555	2,110	62	190	298	3,428	195	156	8
34	Hawaii	251	2,514	52	158	274	4,038	186	147	8
35	Louisiana	662	4,035	71	217	244	4,414	158	133	4
36	Arkansas	435	2,916	54	166	240	3,980	154	123	6
37	Idaho	453	2,205	52	159	239	3,404	156	124	6
38	Maine	452	1,686	45	137	227	2,998	147	116	6
39	Rhode Island	502	1,185	42	129	226	2,404	151	117	6
40	Delaware	259	1,939	41	125	213	3,010	138	108	6
41	Nebraska	540	2,064	52	159	199	2,626	129	107	4
42	New Mexico	235	2,408	44	135	184	3,121	121	98	4
43	Mississippi	429	2,210	37	114	168	2,995	106	85	4
44	West Virginia	229	1,822	37	114	141	2,245	92	76	3
45	Vermont	282	726	24	73	111	1,264	72	58	3
46	Montana	254	641	16	48	62	872	39	32	1
47	Wyoming	164	437	15	46	62	682	40	32	1
48	Alaska	93	349	14	42	46	400	31	26	1
49	South Dakota	173	541	11	34	41	647	25	21	1
50	North Dakota	149	345	8	25	31	442	20	16	1

Note: export share values shown for TX, MN and NM were taken from 1999 *Implan* model data to correct unreasonably low values (<1%).

* Values expressed in 2004 dollars (GDP Implicit Price Deflator, US Dept. Commerce).

Table 5-5. Economic Impacts of the U.S. Landscape Architecture Sector by State, 2002

Rank	State	Establishments	Employment	Annual Wages (\$Mn)*	Output (\$Mn)*	Output Impacts (\$Mn)*	Employment Impacts (jobs)	Value Added Impacts (\$Mn)*	Labor Income Impacts (\$Mn)*	Indirect Business Tax Impacts (\$Mn)*
	Total	6,225	36,679	1,384	3,714	4,803	48,683	3,449	2,549	74
1	California	894	7,923	287	771	1,102	11,294	785	601	20
2	Texas	293	2,916	103	277	372	3,959	264	203	6
3	Illinois	377	1,575	83	224	256	1,909	186	146	3
4	Florida	422	2,532	88	236	250	2,697	185	146	2
5	Michigan	195	940	51	137	236	2,045	161	5	5
6	Massachusetts	236	1,093	56	152	230	1,890	163	124	5
7	Colorado	183	1,071	51	136	204	1,825	144	110	4
8	New York	373	1,422	69	185	194	1,507	144	114	2
9	Pennsylvania	263	1,317	50	135	183	1,844	130	100	3
10	New Jersey	233	1,004	42	112	146	1,340	105	81	2
11	North Carolina	199	1,105	36	97	122	1,414	88	68	2
12	Georgia	200	1,218	39	105	118	1,370	86	68	1
13	Arizona	133	1,082	38	102	115	1,228	84	66	1
14	Virginia	144	1,057	33	89	109	1,292	80	62	1
15	Ohio	172	855	33	88	107	1,093	77	60	1
16	Wisconsin	100	633	26	70	89	882	64	49	1
17	Maryland	133	707	26	71	87	894	64	50	1
18	Washington	171	618	24	65	85	846	61	47	1
19	Tennessee	93	729	18	48	65	929	46	35	1
20	Connecticut	96	427	20	53	62	523	46	36	1
21	Oregon	84	543	16	43	58	735	42	32	1
22	Minnesota	90	384	17	45	56	510	40	31	1
23	Hawaii	34	365	14	39	46	454	33	26	1
24	Indiana	102	382	14	36	44	477	32	25	1
25	South Carolina	90	462	14	37	44	563	32	25	1
26	Alabama	58	435	11	29	41	590	29	22	1
27	Kansas	32	373	11	28	39	507	27	21	1
28	Nevada	45	351	11	30	32	366	23	19	0
29	Missouri	78	310	10	26	27	327	20	16	0
30	Maine	44	173	7	20	26	254	18	14	0
31	Iowa	46	201	8	22	23	213	17	13	0
32	New Mexico	49	206	6	16	23	316	17	13	0
33	Mississippi	39	281	7	19	22	314	16	12	0
34	Louisiana	55	340	7	19	21	370	15	12	0
35	Kentucky	53	264	7	19	20	274	15	12	0
36	New Hampshire	29	110	5	14	18	157	13	10	0
37	Oklahoma	49	238	6	17	17	249	13	10	0
38	Delaware	25	123	4	10	16	184	11	8	0
39	Nebraska	29	147	6	15	16	157	12	9	0
40	Arkansas	30	147	6	15	15	155	11	9	0
41	Utah	67	140	5	13	14	150	10	8	0
42	Idaho	33	118	4	11	11	130	8	7	0
43	Vermont	31	52	3	7	9	81	6	5	0
44	Rhode Island	32	50	2	5	7	70	5	4	0
45	Alaska	7	50	2	5	6	68	5	4	0
46	Montana	31	50	2	5	6	60	4	3	0
47	West Virginia	14	50	2	5	6	58	4	3	0
48	Wyoming	16	50	2	5	5	53	4	3	0
49	South Dakota	15	50	2	4	4	52	3	3	0
50	North Dakota	8	8	0	1	1	10	1	1	0

* Values expressed in 2004 dollars (GDP Implicit Price Deflator, US Dept. Commerce).