

Final report

Project title:

Nursery Industry Statistics 2020-21 to 2024-25

Project leader:

Greenlife Industry Australia Limited

Delivery partner:

Acil Allen

Down To Earth Research

Report author/s:

Celeste Cook

Project code:

NY21000 Nursery Industry Statistics 2020-21 to 2024-25

Date:

31st August 2026

Disclaimer:

Horticulture Innovation Australia Limited (Hort Innovation) makes no representations and expressly disclaims all warranties (to the extent permitted by law) about the accuracy, completeness, or currency of information in this final report.

Users of this final report should take independent action to confirm any information in this final report before relying on that information in any way.

Reliance on any information provided by Hort Innovation is entirely at your own risk. Hort Innovation is not (to the extent permitted by law) responsible for, and will not be liable for, any loss, damage, claim, expense, cost (including legal costs) or other liability arising in any way (including from Hort Innovation or any other person's negligence or otherwise) from your use or non-use of the final report or from reliance on information contained in the final report or that Hort Innovation provides to you by any other means.

Funding statement:

Levy funds – R&D projects

This project has been funded by Hort Innovation, using the nursery research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

Publishing details:

ISBN <Hort Innovation to add>

Published and distributed by: Horticulture Innovation Australia Limited
ABN 71 602100149

Level 15
141 Walker Street
North Sydney NSW 2060

Telephone: (02) 8295 2300

www.horticulture.com.au

© Copyright 2026 Horticulture Innovation Australia Limited

Contents

Public summary..... 4

Keywords 5

Introduction..... 6

Methodology 8

Results and discussion 10

Outputs 11

Outcomes..... 18

Monitoring and evaluation 20

Recommendations..... 25

Intellectual property 26

Appendices 27

Public summary

The NY21000 Nursery Industry Statistics project was undertaken to provide the Australian nursery industry with accurate, reliable and up-to-date information on industry production, employment, business performance, market channels and industry trends. Historically, the nursery industry has faced challenges collecting comprehensive national data due to the diversity of businesses, complex supply chains and concerns about confidentiality. Without robust statistics, growers, industry organisations, government and researchers have limited evidence to support business planning, investment decisions, advocacy and future industry development.

To address this need, Greenlife Industry Australia, Down To Earth Research and ACIL Allen delivered five years of annual industry data collection covering the 2020/21 to 2024/25 financial years. The project used a statistically representative survey of approximately 300 production nurseries each year, supported by telephone, online and email data collection methods. Over the life of the project, 1,435 production nursery surveys were completed. Additional validation surveys with retail nurseries and landscape businesses were undertaken to strengthen confidence in survey data and verify findings. The project also delivered annual statistics reports, benchmarking tools, webinars, communications activities, an Economic Contribution Analysis, a PESTLE environmental scan and an interactive Power BI dashboard.

The project successfully established the most comprehensive longitudinal datasets available for the Australian nursery industry. Results demonstrated the ongoing economic importance of the sector, with annual production values exceeding \$2 billion and strong indicators of industry confidence and future growth. The Economic Contribution Analysis estimated the nursery industry generated \$2.78 billion in production value, contributed \$2.49 billion in value added to the Australian economy and supported more than 12,500 full-time equivalent jobs. Validation activities confirmed strong alignment between production nursery data and downstream market purchases, increasing confidence in the reliability of the statistics.

The project has provided significant benefits to growers and industry stakeholders by improving access to trusted industry intelligence. The Nursery Industry Benchmarking Tool, distributed to more than 1,192 levy payers and participants, enables businesses to compare their performance against industry benchmarks and make more informed decisions regarding productivity, profitability and investment. Approximately 65% of users reported that the benchmarking tool influenced decision-making within their business.

New information and resources developed through the project include annual Nursery Industry Statistics reports, the Nursery Industry Benchmarking Tool, Facts at a Glance publications, data validation reports, the Economic Contribution Analysis, the PESTLE Environmental Scan, benchmarking tool webinars and the Nursery Industry Statistics Power BI Dashboard. Publicly available reports, statistics, factsheets and project resources can be accessed through the Greenlife Industry Australia website and associated project communication channels.

Keywords

Nursery Industry Statistics; Australian Nursery Industry; Greenlife Industry; Production Nursery Data; Nursery Industry Benchmarking; Business Benchmarking Tool; Nursery Industry Survey; Industry Performance Data; Nursery Industry ; trends; Greenlife Production; Nursery Business Performance; Horticulture Statistics; Industry Benchmarking; Nursery Market Analysis; Nursery Employment Data; Nursery Industry Economics; Economic Contribution Analysis; Industry Sentiment; Data Validation; Production Nursery Sector; Industry Intelligence; Nursery Business Planning; Nursery Industry Dashboard; Power BI Dashboard; Australian Horticulture; Greenlife Industry Australia; Evidence-Based Decision Making; Industry Research and Development; Nursery Industry Investment; Industry Forecasting

Introduction

The Nursery Industry Statistics 2020-21 to 2024-25 project (NY21000) was established to continue and build upon the successful nursery industry statistics programs delivered through projects NY16004 and NY17008. These earlier projects collected comprehensive and representative data for the Australian production nursery industry across the 2015/16, 2017/18, 2018/19 and 2019/20 financial years, providing the first robust national dataset on industry size, production, employment, markets and economic value. The previous projects demonstrated that a collaborative approach between Greenlife Industry Australia (GIA), Down to Earth Research (DTER) and ACIL Allen could successfully engage growers and generate reliable industry statistics while maintaining participant confidentiality and trust.

NY21000 covers the period from 2020/21 to 2024/25 and involves annual data collection, analysis, validation and reporting, alongside the continued development of the industry benchmarking tools. It is delivered through a partnership between GIA, DTER and ACIL Allen, combining industry engagement, survey expertise, economic analysis and data interpretation capabilities.

The project was undertaken because the nursery industry has historically faced significant challenges in collecting accurate industry-wide data. These challenges include the diversity of businesses across different sizes, locations and product types, the complex supply chain where plants may be sold multiple times before reaching the end user, and a general reluctance among businesses to share commercial information due to concerns about confidentiality and perceived value.

To address these challenges, the project aims to deliver accurate, timely and longitudinal industry statistics that support:

- Strategic planning and industry development.
- Business decision-making and investment decisions.
- Record keeping and benchmarking.
- Productivity and profitability improvements.
- Sustainable business management.
- Evidence-based investment by Hort Innovation and industry stakeholders.

The project also responds directly to recommendations from NY17008, which highlighted the importance of ongoing, multi-year data collection to ensure continuity, improve data validation, and allow industry trends to be measured over time. By maintaining a consistent methodology and collecting data annually, the project creates a reliable evidence base to inform future industry priorities and investments.

The project is significant because it provides the nursery industry with the most comprehensive and reliable source of national intelligence available. It delivers annual information on:

- Nursery gate value of production.
- Volumes of greenlife products sold.
- Production area and capacity.
- Number of businesses and employees.
- Business turnover and operating costs.
- Capital investment and technology adoption.
- Industry sentiment and future confidence.
- Long-term industry trends.

The resulting data enables growers, industry bodies, government agencies, researchers, banks and insurers to make more informed decisions based on verified industry information rather than anecdotal evidence. The project also supports the ongoing refinement of a nursery business benchmarking tool, allowing levy payers to compare their performance against industry averages and identify opportunities to improve productivity, profitability and competitiveness.

Importantly, the project aligns with Outcome 4 (Business Insights) of the Nursery Industry Strategic Investment Plan 2022-2026 by providing the data needed to measure industry performance, understand market and operating trends, identify emerging issues and support evidence-based decision making across the sector. The project further strengthens industry

capability by validating production data through supply chain surveys, assessing the economic contribution of the sector, and providing environmental scanning and trend analysis to help guide future industry strategy and investment.

Overall, NY21000 provides the foundational data infrastructure needed for industry planning, policy development, investment prioritisation and business benchmarking, ensuring that the Australian production nursery industry has access to reliable and trusted information to support its long-term growth and sustainability.

Methodology

The project employed a statistically robust survey-based methodology to collect annual industry data from approximately 300 production nursery businesses each year. The primary data collection method was Computer Assisted Telephone Interviewing (CATI), supported by mail, email and online survey options to maximise participation and improve response rates. This approach was selected because it had proven effective in previous projects and provided a statistically representative sample of the Australian nursery industry.

The methodology was chosen over alternative collection methods because it:

- Produces higher response rates than self-completion surveys, particularly by offering telephone-based survey completion for growers who are reluctant to use or do not trust online systems.
- Generates statistically reliable and robust datasets.
- Supports calculation of confidence intervals and margins of error.
- Enables consistent year-on-year comparisons and trend analysis.

Survey data collected included:

- Volumes of greenlife products sold.
- Nursery gate value of production.
- Production area.
- Number of businesses and employees.
- Business turnover and operating costs.
- Capital investment and technology adoption.
- Industry confidence and sentiment.
- Longitudinal business and market trends.

Statistical analysis included trend analysis across survey years and application of appropriate statistical techniques such as chi-square testing and t-testing to assess significant changes over time. Sampling error, response rates and statistical confidence measures were also reported.

Data Validation Activities

To improve confidence in industry statistics, the project incorporated data validation activities using information collected from downstream supply chain participants. Validation surveys were conducted with retail and landscape customers purchasing products directly from production nurseries. This process enabled comparison between nursery sales data and customer purchasing data to verify industry estimates and strengthen the robustness of the results. Validation studies were undertaken during Years 2 and 4 of the project.

A major output of the project was the ongoing development and refinement of the Nursery Business Benchmarking Tool, originally developed under project NY16004. The tool allows nursery businesses to benchmark their performance against industry averages across key indicators such as:

- Sales and turnover.
- Employment levels.
- Productivity.
- Labour costs.
- Business performance metrics.

Following each annual survey cycle, benchmarking data were updated and incorporated into the tool. The project also investigated opportunities to transition the benchmarking tool to a web-based platform, subject to industry requirements

relating to privacy, security, usability and value for money.

Additional Research Activities

The project included specialised research activities to expand the value of the industry dataset, including:

- Economic Contribution Study (Year 2): Estimation of the nursery industry's contribution to the Australian economy using Census, AgCensus and input-output economic modelling.
- Environmental Scan (Year 3): A PESTLE (Political, Economic, Social, Technological, Legal and Environmental) analysis to identify emerging industry trends, risks and opportunities.

The project included a strong extension and communication component to ensure findings were disseminated and adopted by industry.

Extension activities included:

- Distribution of benchmarking tools to participating businesses and levy payers who requested the tool.
- Development of case studies demonstrating how growers use project data and benchmarking outputs for decision making.
- Annual summaries of industry statistics: "Facts at a glance".
- Industry communications and reporting.
- Website content and industry articles.
- Information webinars such as how to use the benchmarking tool.

Communication and extension activities were delivered through the nursery levy-funded communications program NY18001/NY22000, ensuring alignment with existing industry communication channels and maximising industry reach.

Project Governance and Management

Project oversight was provided through a Project Reference Group (PRG) comprising representatives from the industry and Hort Innovation, Greenlife Industry Australia and the project delivery team. The PRG met at least twice annually to:

- Review project progress.
- Identify future priorities.
- Make recommendations regarding continuation of project activities at annual Stop/Go decision points.

The project also incorporated:

- A Program Logic.
- Monitoring and Evaluation Plan.
- Risk Register.
- Stakeholder Engagement and Communication Plan.
- Independent mid-term review in Year 3 to assess project performance and identify opportunities for improvement during the final project years.
- Linkages to Previous and Related Projects

The methodology directly built upon the successful approaches developed in NY16004 Nursery Industry Statistics and Research 2016-17 and NY17008 Nursery Industry Statistics 2017-18 to 2019-20. Survey instruments, sampling methodologies, reporting frameworks and benchmarking tools developed under those projects were refined and continued to provide a consistent longitudinal data series for the nursery industry.

Project outputs were also linked to the nursery communications project NY18001/NY22000, which supported extension and dissemination activities, and informed strategic planning under the Nursery Industry Strategic Investment Plan 2022-2026.

The project used a nationally representative survey and validation methodology, supported by economic analysis, benchmarking tool development, industry engagement and structured governance. By building on previous industry

project investments and integrating extension activities with existing communication programs, the project delivered a robust and repeatable framework for generating accurate, longitudinal nursery industry data to support evidence-based decision making across the Australian nursery sector

Results and discussion

The NY21000 Nursery Industry Statistics project generated the most comprehensive and reliable longitudinal dataset currently available for the Australian production nursery industry, covering the 2020/21 to 2024/25 financial years. Across the project, 1,435 production nursery surveys were completed, resulting in the production of the Production Nursery Data Collection Report. The report provides robust data on industry production value, plant volumes, employment, business performance, investment, market channels, industry confidence and business intentions.

Results demonstrate that the Australian nursery industry remained economically significant throughout the project period, with annual survey collections consistently estimating industry production values exceeding \$2 billion and providing detailed insight into changes in production trends, workforce requirements, technology investment and industry sentiment. The annual survey reports enabled industry stakeholders to monitor year-on-year performance and identify emerging opportunities and challenges affecting nursery businesses.

Industry confidence and growth intentions remained positive over the life of the project. The final survey year identified industry confidence levels of approximately 78%, with 45% of surveyed businesses indicating intentions to grow over the next five years. These findings suggest a resilient industry that continues to invest in future expansion despite ongoing pressures associated with labour availability, costs, water access and broader economic conditions.

Data validation activities involving 100 retail nurseries and 100 landscape businesses across two validation exercises confirmed alignment between nursery production data and downstream purchasing information. This validation strengthened confidence in the reliability and credibility of industry estimates and demonstrated that the survey methodology provides a sound basis for industry planning, advocacy and investment decisions.

The project also delivered an Economic Contribution Analysis, which estimated that the nursery industry generated approximately \$2.78 billion in production value, contributed \$2.49 billion in value added to the Australian economy, and supported more than 12,500 full-time equivalent jobs. These results provide important evidence to support industry advocacy, policy development and future investment in nursery production.

The PESTLE Environmental Scan identified a range of emerging political, economic, social, technological, legal and environmental trends influencing future industry development. Together with the annual statistics reports, these findings provide a valuable evidence base to support industry strategy, RD&E prioritisation and long-term planning.

A key project outcome was the continued refinement and distribution of the Nursery Industry Benchmarking Tool. Over the project period, the tool was distributed to 1,192 levy payers and participants and supported by five webinars, enabling growers to compare their business performance against industry benchmarks and use data-driven insights for business planning, investment and productivity improvement. Approximately 65% of users reported the tool influenced decision-making within their businesses.

The project's findings have been disseminated through annual statistics reports, benchmarking tools, webinars, communications activities, the Power BI dashboard and Facts at a Glance publications. Collectively, these outputs have increased industry access to reliable statistics and enhanced the industry's capacity to make informed business and investment decisions. The resulting datasets provide a valuable foundation for future nursery industry research, economic analysis, market forecasting and benchmarking initiatives.

Outputs

Table 1. Output summary

Output	Description	Detail
Program logic	The Program Logic links project activities, outputs, and intended outcomes. It demonstrates how data collection, validation, stakeholder engagement, and the development of the benchmarking tool will lead to improved industry knowledge, better business decision-making by growers, and stronger evidence to support industry planning, marketing, advocacy, and R&D prioritisation. The program logic identifies the expected short, medium, and longterm benefits of the project, including increased access to reliable nursery industry statistics, improved confidence in industry data, and greater use of benchmarking information by nursery businesses to improve performance and inform strategic decisions.	Submitted to Hort Innovation milestone 102
M&E plan	The Monitoring and Evaluation (M&E) Plan for NY21000 provides a framework for measuring the effectiveness of the project over 2021-2025. It outlines how project activities, outputs, and outcomes will be monitored through data collection, stakeholder feedback, annual reporting, and evaluation against key questions relating to relevance, effectiveness, engagement, and industry impact. The plan establishes responsibilities, reporting processes, and continuous improvement mechanisms to ensure the project delivers reliable nursery industry statistics, validated data, and benchmarking tools that support informed business and industry decision-making	Submitted to Hort Innovation milestone 102
Risk management plan	The Risk Management Plan for NY21000 identifies potential risks that could affect project delivery, data quality, stakeholder	Submitted to Hort Innovation milestone 102

	participation, privacy, and survey outcomes, and outlines mitigation measures to manage these risks. It uses a structured risk assessment framework to evaluate likelihood, consequence, controls, responsibilities, and acceptable risk levels, helping ensure the project delivers reliable industry statistics while protecting participant confidentiality and maintaining industry confidence.																															
Stakeholder engagement and communications plan	The Engagement Plan for NY21000 outlines how GIA will communicate with and engage growers, supply chain participants, and industry stakeholders throughout the first year of the project. The plan aims to increase participation in industry data collection, promote the value of industry statistics and benchmarking tools, and encourage adoption and feedback through activities such as social media, webinars, media releases, infographics, industry publications, and direct communications. The document also details target audiences, communication objectives, engagement activities, evaluation measures, and reporting requirements to ensure the project's research findings and benchmarking resources are effectively shared with the nursery industry and other key stakeholders	Submitted to Hort Innovation milestone 102.																														
Greenlife collection survey	The Greenlife survey performed by DTER is used to collect production nursery data for the NY21000. It captures information on workforce, wages, production area, plant sales, customer markets, operating costs, profitability, investment, business confidence, growth intentions, and industry challenges, providing the data used to generate national nursery industry statistics report and benchmarking tool.	1,435 surveys completed in total for the project by the following methods. <table><tr><th>Year</th><th>CATI/Telephone</th><th>Email</th><th>Online</th><th>Total</th></tr><tr><td>2020/21</td><td>167</td><td>57</td><td>45</td><td>269</td></tr><tr><td>2021/22</td><td>173</td><td>51</td><td>42</td><td>266</td></tr><tr><td>2022/23</td><td>180</td><td>60</td><td>63</td><td>303</td></tr><tr><td>2023/24</td><td>171</td><td>56</td><td>69</td><td>297</td></tr><tr><td>2024/25</td><td>174</td><td>59</td><td>67</td><td>300</td></tr></table> Survey results are detailed in the Production Nursery Data Collection Report each year of the project and submitted to Hort Innovation in annual milestone reports.	Year	CATI/Telephone	Email	Online	Total	2020/21	167	57	45	269	2021/22	173	51	42	266	2022/23	180	60	63	303	2023/24	171	56	69	297	2024/25	174	59	67	300
Year	CATI/Telephone	Email	Online	Total																												
2020/21	167	57	45	269																												
2021/22	173	51	42	266																												
2022/23	180	60	63	303																												
2023/24	171	56	69	297																												
2024/25	174	59	67	300																												
PRG Meetings	Project Reference Group (PRG) meetings are held to provide industry oversight, guidance, and feedback throughout the NY21000 project. The PRG includes	11 meetings held over the project life with minutes submitted to Hort Innovation as an appendix to each milestone report. See appendix C																														

	representatives from Industry, GIA, DTER, ACIL Allen, and Hort Innovation, ensuring the project remains relevant to industry needs and delivers useful outcomes.	
Benchmarking Tool	The Benchmarking Tool is an interactive business analysis tool developed from the Greenlife survey data by Acil Allen. It is in the form of an Excel Workbook. The Tool enables participating growers and levy payers to compare their own business performance against industry benchmarks across key metrics such as sales, production area, workforce, wages, profitability, operating costs, investment, and market channels. The workbook transforms the survey data into a practical decision-support resource, allowing nursery businesses to assess their performance relative to similar enterprises, identify strengths and opportunities for improvement, and support strategic business planning and investment decisions.	Updated each year to reflect the latest data collected in the greenlife industry survey and has so far been provided to 1,192 levy payers.
Benchmarking tool webinar	The Benchmarking Tool Webinar is an online extension and training session designed to introduce levy payers to the latest updates to the Benchmarking Tool. The webinar explains the key findings from the annual data collection, demonstrates how to navigate and use the tool, and helps participants understand how to compare their business performance against industry benchmarks. The webinar also provides practical guidance on interpreting benchmark results and applying them to business planning, investment decisions, productivity improvements, and strategic decision-making within nursery production businesses.	206 + registrations (year one attendance not available), webinar recording 510+ views across 5 webinars for the project life. Recordings of the webinars are available through the GIA YouTube channel.
Production Nursery Data Collection Report	Nursery Industry Statistics Survey Reports present the results of a national survey of ~300 production nurseries annually to provide insights into industry production value, sales channels, plant categories, workforce, investment,	Production Nursery Data Collection Reports were submitted in February of each year of the project via milestones 102,104,106,108,110. Production Nursery Data Collection Reports suitable for distribution are available from the GIA website. Production Nursery Data Collection Reports NOT

	technology adoption, industry confidence, business intentions, and benchmarking tool usage. The reports produced by DTER are intended to support industry decision-making, strategic planning, advocacy, and benchmarking. Two versions of the report are produced each year for NY21000. The “suitable for distribution” report provides industry-wide statistics and trends that can be shared broadly with levy payers and stakeholders. The “not suitable for distribution” report contains all of the same information but also includes commercially sensitive financial insights on business profitability and operating costs.	suitable for distribution were provided in milestone reports 102,104,106,108,110.
Power BI dashboard	The Nursery industry market dashboard is an interactive Power BI dashboard produced by DTER that provides industry stakeholders with easy access to key nursery industry statistics and trends, including production value, employment, market channels, business sentiment, operating performance, and industry challenges using data collected through NY21000. It enables users to explore historical industry data, benchmark performance, and monitor changes in the Australian production nursery industry through a series of visual reports and filters	See the Nursery Industry Statistics dashboard here. Please note, currently no budget is allocated for the dashboard, it was produced for project/industry benefit as an option for those not currently engaged with the benchmarking tool and an opportunity for participants, non-participants and wider industry to see the results.
Facts at a glance infographic	The Nursery Industry “Facts at a Glance” publication provides a concise snapshot of the Australian nursery industry's performance, summarising key statistics on production, sales, employment, productivity, industry confidence, investment, and market trends. It translates findings from the Production Nursery Data Collection Report into an accessible format for growers, levy payers, and stakeholders, while highlighting industry challenges, growth opportunities, and the value of the Nursery Industry Business	Released following the Data Capture report and uploaded to the GIA website and promoted through the GIA eNews at the time of release see appendix A.

	Benchmarking Tool.											
Project communications	The project delivered a comprehensive communications program that included social media campaigns, webinars, media releases, case studies, Nursery Papers articles, and eNews content to promote industry statistics, encourage survey participation, support adoption of the benchmarking tool, and communicate key findings and industry insights to growers and stakeholders	Project total communications are detailed in appendix A. Total project communications activities: • 68 social media posts • 25 email communications (20 eNews inclusions/articles and 5 eBlasts) • 6 webinars • 9 media releases • 5 “Facts at a Glance” publications • 4 R&D Updates • 4 Nursery Papers • 3 case studies • 4 state association articles This equates to at least 131 discrete communications outputs delivered throughout the project, excluding republications, website page hosting, external media pickup, and webinar recordings. • Hort Journal republication of media release x 1 • Eco Voice republication of media release x 1 • Horticultural Media Association republication x 1 • FloraCulture International article requested by AIPH x 1 • Levy-payer Toolkit inclusion x 1 • Presentation in GIA Business Resiliency webinar x 1										
Data validation reports	The Data Validation Reports produced by DTER document the findings of the project's validation survey, which is undertaken to verify and strengthen the accuracy, reliability, and credibility of the nursery industry statistics collected from production nurseries. The reports compare and assess industry data collected from growers against information gathered from other parts of the supply chain, such as retailers and landscapers. The reports identify areas of alignment, highlight any discrepancies or emerging trends, and provide evidence to support confidence in the industry's production, sales, and market data.	Two data validation reports were delivered and submitted through milestones 104 and 108. <table><tr><th>Activity</th><th>Total</th></tr><tr><td>Retail Nursery Validation Surveys</td><td>100</td></tr><tr><td>Landscape Business Validation Surveys</td><td>100</td></tr><tr><td>Validation Exercises Completed</td><td>2</td></tr><tr><td>Validation Reports Produced</td><td>2</td></tr></table>	Activity	Total	Retail Nursery Validation Surveys	100	Landscape Business Validation Surveys	100	Validation Exercises Completed	2	Validation Reports Produced	2
Activity	Total											
Retail Nursery Validation Surveys	100											
Landscape Business Validation Surveys	100											
Validation Exercises Completed	2											
Validation Reports Produced	2											

	They are an important component of the overall research program, ensuring that the statistics and benchmarking outputs are robust, defensible, and suitable for industry planning, advocacy, investment, and decision-making.	
Economic Contribution Analysis	The Economic Contribution of Australia's Nursery Industry report by Acil Allen assesses the nursery industry's contribution to the Australian economy using modelling by the Centre for International Economics (CIE) and industry data collected through the NY21000 Nursery Industry Statistics Project. It quantifies the industry's economic impact in terms of gross value of production (GVP), employment, and gross value added (GVA) at national and state levels and provides forecasts through to FY2030.	Delivered in year The analysis demonstrates the significant economic importance of the nursery industry, estimating that in FY2022 it generated \$2.78 billion in production value, supported 12,506 full-time equivalent jobs, and contributed \$2.49 billion in value added to the Australian economy, while also highlighting broader environmental and social benefits such as urban greening, biodiversity conservation, carbon sequestration, and community wellbeing. The Economic Contribution Analysis (ECA) was completed in Year 3 submitted to Hort Innovation in MS105.
Industry PESTLE Environmental Scan	The PESTLE Analysis examined the key Political, Economic, Social, Technological, Legal, and Environmental factors influencing the Australian nursery industry and its future development. It provided a strategic assessment of external opportunities, risks, and emerging trends to inform industry planning, investment decisions, research priorities, and long-term industry sustainability.	The PESTLE analysis was submitted to Hort innovation in MS107.
Independent Mid-Term Evaluation	The Mid-Term Evaluation was an independent assessment undertaken by RM Consulting Group (RMCG) on behalf of Hort Innovation to review the performance NY21000 at the midpoint of delivery.	The evaluation assessed the project's effectiveness, efficiency, relevance, and appropriateness, measured progress against the project's program logic and monitoring and evaluation framework and provided recommendations to support continuous improvement and successful delivery of project outcomes through to completion in 2026. The independent mid-term evaluation found that the NY21000 project was performing well and was on track to achieve its intended outcomes, with strong progress in delivering industry statistics, data validation, benchmarking tools, and industry engagement activities. The evaluation concluded that the project provided valuable data to support business decision-making, had successfully met its milestones, and was well regarded by industry participants, while recommending increased industry engagement, additional opportunities for feedback, and refreshment of Project Reference Group membership. Since the reports completion, the project has had one

		new member join the PRG – Mark Jackson from Southern Plants in VIC. Submitted to Hort Innovation in MS107.
Milestone reports	The formal project reporting document submitted to Hort Innovation that records progress against agreed project activities, outputs, deliverables, risks, and performance measures for a defined reporting period. It provides evidence of work completed, highlights key achievements and outcomes, identifies any issues or variations to project delivery, and demonstrates progress toward the project's objectives and contracted milestones.	10 reports including this report have been submitted at each milestone to Hort Innovations.

Outcomes

Table 2. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Nursery industry/stakeholders have access to up-to-date nursery statistics. Participating growers are using the outputs and benchmarks to enable informed business decision making. The industry has access to baseline industry data that can act as a foundational input to prioritising R&D, support marketing and production decisions and advocacy.	Outcome 4: The Australian nursery industry is more profitable through informed decision-making using consumer knowledge and tracking, production statistics, forecasting, benchmarking and independent reviews. Specifically supporting levy payers to a) use industry production benchmarking activity to measure and track industry productivity and profitability; and b) Use industry production and market segmentation statistics to inform long-term and/or in-season market planning and supply strategies.	Data capture report based on the project annual data capture survey performed by DTER with results compared to previous years, and trends identified. Survey methodology is refined each year by the PRG to deliver the Data survey report and benchmarking tool. Output delivery per the communications plan provides project outputs to industry in accessible formats such as excel spreadsheets for the benchmarking tool, use of the GIA website, eNews and social media platforms. Industry benchmarking tool is available online by request to levy payers.	Survey response rates have been monitored and compared with past collections and anecdotal evidence towards participation gathered. Response rates for the survey over the life of the project were maintained at ~300 participants annually with 1435 responses over the project life. Five Benchmarking tool webinars were attended by each year of the project with total project registrations of 206+. In total for the project 1192 industry members have requested and been provided access to the benchmarking tool of which there has been an updated version produced for each financial year to reflect latest survey findings. Discussion has been ongoing throughout the project in the past 9 PRG meetings and again during the latest (10th) PRG meeting to improve industry involvement in the project survey and participation in the PRG. In 2025 the project attracted one new PRG member from VIC. Discussions during the PRG meetings have also centered around improvements that can be provided to the data to ensure relevance to industry and future ideas for improving the Benchmarking Tool. Evidence provided through

			all project milestones. Results of all project reports, power BI dashboard and benchmarking tool communicated to industry and stakeholders. See appendix A Refinement of data collection methodologies via PRG meetings twice per year with the latest currently in review and on track for implementation of the survey in September 2025. See appendix C Landscape and retail associations were engaged by GIA on behalf of DTER for validation of the industry survey data. Data validation reports were submitted in milestones 104 and 108. Access to industry of the DTER Data Capture Report for each financial year of the project are available through the GIA website,
--	--	--	--

Monitoring and evaluation

Table 3. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
1. To what extent has the project achieved its expected outcomes?	The project successfully achieved its expected outcomes, delivering on all project deliverables, collecting 1,435 production nursery surveys across five years, producing annual statistics reports, validation reports, benchmarking tools, and establishing a comprehensive national dataset for industry decision-making. The independent mid-term evaluation found all project outcomes were On Track. Across five annual collections, the project generated robust data on plant volumes, production value, product categories, supply channels, business characteristics, employment and workforce metrics, supported by 1,435 completed production nursery surveys. The surveys successfully captured industry sentiment, confidence, growth intentions and business outlook, showing for example that industry confidence increased to 78% in 2024/25 and businesses planning future growth increased to 45%. The project delivered annual Nursery Industry Statistics reports from 2020/21 to 2024/25, providing growers and stakeholders with up-to-date information on industry production volumes, sales values, employment, market channels, business performance, and industry trends. Data reliability was strengthened through formal validation activities and independent review processes. Two validation exercises involving more than 200 retail and landscape businesses confirmed that production nursery sales estimates aligned with supply chain purchase data, validating the methodology and increasing confidence in the reported industry statistics.	If continued, the project will leverage Greenlife Industry Australia’s national and state industry networks, including the GIA CEO’s engagement with State GIA Association CEOs and executive staff, to promote survey participation and strengthen industry involvement in the Nursery Industry Statistics project. It will continue to present annual survey results, benchmarking tool updates, and individualized reports for state-level findings to encourage State Associations to support data collection, improve grower participation, enhance the accuracy and reliability of state-based statistics, and work toward delivering increasingly detailed state and business-level benchmarking insights as data coverage and project resources allow.

2. How relevant was the project to the needs of intended beneficiaries?	The project was highly relevant to the needs of growers, levy payers, industry organisations, and other stakeholders by providing reliable industry statistics, benchmarking data, and market insights that supported business decision-making, strategic planning, resource allocation, and performance assessment. Industry feedback indicated that the benchmarking tool and annual statistics reports were valuable for conducting business health checks, comparing performance against industry benchmarks, identifying trends, and informing production and marketing decisions. Approximately 65% of benchmarking tool users reported that the tool influenced decision-making in their business, demonstrating strong relevance and usefulness to industry participants. Survey participants also expressed a willingness to continue contributing data, recognising that ongoing participation improves the quality and value of industry insights. The project successfully balanced industry demand for detailed information with confidentiality requirements and practical survey delivery constraints. Statistics were presented through annual industry reports, benchmarking tools, webinars, Facts at a Glance publications, Nursery Papers, and other communication materials. Industry feedback indicated that the benchmarking tool and visual presentation of data were valuable for understanding trends, comparing performance, and informing business decisions. Growers provided feedback through Project Reference Group meetings, benchmarking tool reviews, surveys, webinars, and interviews conducted as part of the independent mid-term evaluation. This feedback was used to refine the benchmarking tool, improve reporting formats, and adjust survey questions over the life	Engagement by project partners with State GIA Associations will strengthen the relevance and value of the Nursery Industry Statistics project by ensuring survey activities, reporting outputs, and benchmarking resources reflect the priorities, challenges, and information needs of the industries they represent. Through Greenlife Industry Australia's national and state networks, including collaboration between the GIA CEO and State Association CEOs, the project will promote survey participation, enhance industry ownership of the data, and support the development of increasingly accurate and meaningful state-level statistics and benchmarking insights.
--	--	--

	of the project.	
3. How well have intended beneficiaries been engaged in the project?	Intended beneficiaries were well engaged throughout the project through annual surveys, PRG meetings, benchmarking tool webinars, industry communications, reports, and ongoing extension activities. Engagement remained strong, with 1,435 production nursery survey responses, 10 PRG meetings, 5 webinars, and benchmarking tools distributed to more than 1,192 growers and levy payers over the life of the project. The project delivered a broad communications and engagement program that included webinars, social media, eNews articles, Nursery Papers, media releases, Facts at a Glance publications and other extension activities designed to promote survey participation and use of project outputs. More than 131 communication activities were delivered across the project. Participation increased from 266 surveys in 2021/22 to 303 in 2022/23, then remained consistently high at 297 surveys in 2023/24 and 300 surveys in 2024/25. While participation did not increase every year, the project maintained participation at or near the target level and achieved a total of 1,435 completed production nursery surveys. The benchmarking tool was provided annually to survey participants and made available to levy payers on request. Over the project, more than 1,192 industry members received access to the tool, supported by webinars, user guides, and extension activities, with 65% of users reporting that the tool influenced business decision-making	By actively engaging State GIA Associations and providing regular access to survey results, benchmarking updates and state-specific reporting, the project will strengthen industry ownership and demonstrate the value of participation. This increased relevance and visibility will encourage greater grower engagement, improve survey response rates, and foster ongoing support for the project across the nursery industry. resources allow.
4. To what extent were engagement activities appropriate to the target audience/s of the project?	The engagement activities were considered appropriate and effective for the target audience, with industry members reporting that project communications, benchmarking webinars, reports, and extension activities were valuable and accessible. The independent mid-	Engagement with State GIA Associations will help ensure project engagement activities are aligned with industry priorities, emerging issues, and the information needs of growers across different regions. Regular interaction with state associations will enable the project

	term evaluation found that participation levels remained high, communication activities were robust, and the benchmarking tool, webinars, and supporting resources were well received by growers and industry stakeholders. Feedback on survey processes was gathered throughout project delivery and used to refine survey questions, collection methods, and reporting outputs. Input from growers, the Project Reference Group, and survey participants informed ongoing improvements to data collection and project delivery. Feedback was collected through benchmarking tool reviews, webinars, Project Reference Group discussions, industry engagement activities, and the independent mid-term evaluation. This feedback informed improvements to benchmarking tool design, reporting formats, and communication materials. Annual benchmarking tool reviews and user feedback processes were undertaken to improve tool usability, navigation, graphics, data presentation, and functionality. Feedback from users and the Project Reference Group was incorporated into successive benchmarking tool releases. The project delivered five benchmarking webinars and supporting extension resources, making the benchmarking tool accessible to levy payers nationally. Participation was strong, with more than 157 registrations across webinars, and attendance and recording views demonstrated ongoing engagement with the training and extension materials.	to tailor communications, extension activities, and reporting outputs to maximise relevance, participation, and industry value.
5. What efforts did the project make to improve efficiency?	The project team continuously refined project delivery to improve efficiency, including streamlining data management processes, refining survey methods, improving benchmarking tool design, and incorporating feedback from users and the PRG. The independent mid-	The project will continue to improve delivery efficiency by refining survey collection methods, streamlining data management processes, and incorporating feedback from growers, benchmarking users, and the PRG to ensure resources are focused on activities that provide the

	term evaluation found the project was managed efficiently and that improvements had reduced workload while maintaining high-quality outputs. The project used a combination of telephone (CATI), email, and online survey collection methods to maximise participation and reduce barriers to survey completion. Survey questions and collection processes were refined over time based on industry and PRG feedback, while improved data handling systems reduced data processing effort increasing overall efficiency. The project undertook annual benchmarking tool reviews, improved tool graphics, navigation and usability, delivered five benchmarking webinars, developed supporting communications and extension materials, and distributed the tool to more than 1,192 levy payers and participants. Alternative delivery platforms, including Power BI, were investigated to improve accessibility, but the Excel format was retained as the most practical, familiar, low-cost and secure option for industry users.	greatest industry value. Ongoing reviews of the benchmarking tool, communications, and reporting processes will further enhance usability, reduce administrative effort, and support the cost-effective delivery of high-quality industry statistics and insights. The project will also continue to monitor emerging technologies, including artificial intelligence (AI), for opportunities to further improve data analysis, reporting, stakeholder engagement, and operational efficiency, where practical and beneficial to project outcomes.
--	--	---

Recommendations

The following recommendations and next steps have been identified through project delivery, stakeholder feedback, and discussions held by the NY21000 Nursery Industry Statistics PRG. These recommendations aim to maximise the value of industry statistics for growers, industry organisations, researchers and policy-makers, while guiding future investment in nursery industry data collection and analysis.

For any future project, it is recommended that ongoing efforts be made to improve delivery efficiency through the continued refinement of survey collection methods, data management systems, and reporting processes. Maintaining a mixed-method approach to data collection, including telephone, email, and online survey options, will help maximise participation and reduce barriers to engagement. Regular review of survey content, benchmarking tools, communications, and extension activities should continue to ensure they remain relevant, user-friendly, and aligned with industry needs. Opportunities to enhance benchmarking resources through improved usability, data visualisation, and supporting extension materials should also be pursued to increase industry value and adoption. In addition, the project should continue to monitor and evaluate emerging technologies, including artificial intelligence (AI), for their potential to improve data analysis, reporting, stakeholder engagement, and overall project efficiency, while maintaining data quality, security, and cost-effectiveness.

Future RD&E opportunities should focus on maintaining annual data collection to preserve and build upon the valuable longitudinal dataset established through successive nursery industry statistics projects, enabling ongoing monitoring of industry trends, performance, and structural change over time. A key priority should be increasing grower participation and sample sizes to strengthen the reliability of state-level data and support more detailed regional analysis. As data quality and coverage improve, the project should expand state-based reporting, benchmarking outputs, and economic contribution analysis to provide more meaningful insights for growers, industry organisations, policymakers, and investors. These enhanced state-level outputs would support regional advocacy, inform investment and workforce planning, and improve the industry's ability to demonstrate its economic significance and track performance across different parts of Australia.

Additional projects in this space should focus on expanding nursery industry benchmarking and cost-of-production analysis to provide growers and industry stakeholders with a more comprehensive understanding of business performance and the key drivers of profitability. Future work could investigate the collection and reporting of additional more refined data such as cost-related data, including labour, fuel, insurance, energy, freight, and production inputs, to better monitor changing cost pressures across the industry. Consideration should also be given to assessing the feasibility of developing a nursery industry cost index to track input cost trends over time and support business planning, benchmarking, and industry advocacy. Opportunities to incorporate supplier and industry data sources should also be explored to strengthen cost analysis, improve data accuracy, and minimise the reporting burden placed on growers.

Future project activities should place greater emphasis on driving adoption of project outputs and measuring their impact across the nursery industry. This could be achieved through stronger collaboration with State Industry Associations, including regular presentations, briefings, webinars, and communication activities that increase awareness of project findings and encourage participation in industry surveys and benchmarking initiatives. Continued targeted communications should clearly demonstrate how grower participation supports industry advocacy, benchmarking, research investment, and policy development, while showcasing examples of industry outcomes achieved through the statistics program to reinforce its value. The project should also develop more robust mechanisms to measure adoption and impact, including tracking the use of reports, dashboards, and benchmarking tools, and collecting feedback on how project outputs influence business decisions, productivity improvements, and strategic planning. These activities should be supported by an ongoing communications and extension program incorporating webinars, eNews articles, social media, case studies, factsheets, and industry presentations, ensuring project findings are translated into practical, accessible resources that maximise industry uptake and value.

Intellectual property

No project IP or commercialisation to report.

Appendices

Appendix A: Communications summary

NY21000 Milestone 111

Communications Summary

Highlights

- The Benchmarking Tool webinar was held on April 20, attracting 54 registrations on the day, and 127 views of the [recording](#) on YouTube.
- The annual Facts at a Glance report was published in July, receiving 111 views to date.
- Older outputs continue to see increased engagement after long-tail promotion - for example, the 2024–25 Data Capture report has been viewed 51 times in the last two months, despite publication in February,

Outputs

1 July - [2024-25 Facts at a Glance](#)

20 April - annual Benchmarking Tool Webinar held

eNews

- 1 March - [What's the state of the production nursery?](#)
- 9 April - [Benchmarking Tool webinar](#)
- 12 April - [Benchmarking Tool webinar](#)
- 20 April - [Reminder email to webinar attendees](#)
- 27 April - [Watch the webinar recording](#)
- 5 July - [Facts at a Glance](#)

Social media

- 17 March - [Data Capture Report](#) (LinkedIn)
- 17 March - [Data Capture Report](#) (LinkedIn)
- 1 April - [Benchmarking Tool Webinar](#) (LinkedIn)
- 1 April - [Benchmarking Tool Webinar](#) (Facebook)
- 16 April ([Benchmarking Tool Webinar](#) (Facebook)
- 18 April - [Benchmarking Tool Webinar](#) (Facebook)
- 15 April - [Benchmarking Tool Webinar](#) (LinkedIn)
- 17 April - [Benchmarking Tool Webinar](#) (LinkedIn)
- 24 April - [Webinar recording](#) (Facebook)

Non-project deliverables

- Dan Watson (Down to Earth Research) spoke to the Project and Benchmarking tool in a GIA [webinar on business resiliency](#) on 26 August.
- The annual [Levy-payer Toolkit](#) features insights from the 2024–25 Data Capture Report.

Table 1. Summary of Project Milestone communications activities

Milestone 102 and 103 combined	• 16 social media posts promoting survey participation (Facebook, LinkedIn, Twitter etc.) • Case study x 1 • GIA eNews letter x 2 • Landscape Association survey reminder article x 2 • Your Levy at work media release x1 • Facts at a glance x 1 (GIA website) • State association article x 1 • Benchmarking Tool webinar x 1
Milestone 104 and 105 combined	• 16 x social media posts promoting survey participation (Facebook, LinkedIn, Twitter etc.) • Your Levy at work media article x 3 • State association article x 1 • Facts at a glance x 1 (GIA website) • Floral daily article x 1 • Garden Centers Australia article x 1 • Landscape Association article x 1 • Benchmarking Tool webinar x 1
Milestone 106	• 5 social media posts promoting survey participation (Facebook, LinkedIn, Twitter etc.) • benchmarking tool "how to" film GIA website • Benchmarking Tool webinar x 1 • Case Study x 1 • Facts at a glance x 1 (GIA website) • Media release x 1 Production Nursery Data Capture Report • Media release x 1, • R&D update x 1, • Podcast episode x 1, • Facts at a Glance x 1, • eNews inclusions x 4, and • 5 x social media posts. Economic Contribution Analysis • Media release x 1 • R&D update x1, • Nursery paper x 1, 2 x • eNews inclusions x 2 • Social media posts x 3.
Milestone 107	• Social media posts x 6 • Media release x 1 • Case study x1 • Dedicated eBlast x 1

	• eNews inclusion x 1 • Benchmarking Tool Webinar x 1 • State association articles x 2
Milestone 108	• Nursery papers - 2022-23 Data Capture Report and Environmental Scan (PESTLE) x 2 • R&D update - Environmental Scan x 1 • Media release - Environmental Scan x1 • Social media posts x 9 • eNews articles x 4 • eBlast x 1 Media release 'Australian greenlife industry on track for \$3.2 billion dollar growth by 2030' was published by: • Hort Journal • Eco Voice • The Horticultural Media Association International Association of Horticultural Producers (AIPH) have requested an article on the release of the Production Industry Data Capture Report to be published in their March edition of FloraCulture International.
Milestone 109	• Facts at a Glance x 1 • Nursery paper x 1 • social media posts x 8 • eBlast x 1and • eNews inclusions x 3 • Benchmarking Tool webinar x 1 • Infographic on privacy and preparation for use in a pack for Statistics Survey participants.
Milestone 110	• R&D update x 1 • 2024–25 Data Capture Report GIA website x 1 • eBlasts x 2 • eNews inclusions x 4 • social media posts x 6

Appendix B: Statement of receipts and expenditure – confidential

Appendix C: NY21000 Project Reference Group Minutes

NY21000 Nursery Industry Statistics	
Project Reference Group (PRG)	
Date:	24 th August 2026 Time: 2:00 – 3:00pm (AEST)
Location:	Microsoft Teams online meeting
Attendees:	Daniel Watson (Down To Earth Research), JP Van Moort (ACIL Allen), Marshall Roberts (ACIL Allen), Violet Edwards (Hort Innovation), Celeste Cook (GIA Project Manager), Emily Rice (GIA Communications Coordinator), Hamish Mitchell (Levy Payer Specialty Trees).
Apologies:	Sean Cole (GIA CEO), Jenn McQueen (GIA Communications manager)
Contact:	Celeste Cook 0401 476 591 celeste.cook@greenlifeindustry.com.au

1.0 Welcome and Apologies

The Chair welcomed attendees and sought approval of the previous meeting minutes. Members present who had attended the previous meeting reviewed the minutes and confirmed them as a true and accurate record. The minutes were accepted (HM).

2.0 Review of Action Items

Action Item	Status
Submit milestone report to Hort Innovation	Completed
Final milestone submission	In progress
Confirm future project/RFP status	Completed
Convene PRG meeting regarding future project	Completed through current meeting

Celeste advised that the previous milestone had been submitted and accepted by Hort Innovation. Discussion clarified that the final milestone report is due by 31 August 2026, with the final project report also being prepared. Violet confirmed the reporting timeline and noted that a final report template is available via Hort Innovation resources.

3.0 3. Final Report and Project Close-Out

Celeste advised that work is underway on:

- The final project report.
- The final milestone submission.
- The statement of receipts/accounting documentation.
- A communications summary of project activities and outputs.

Members noted the need to document project achievements, communications, and future data priorities as part of project closure requirements.

Matters Arising

3. Final Report and Project Close-Out

Celeste advised that work is underway on:

- The final project report.
- The final milestone submission.
- The statement of receipts/accounting documentation.
- A communications summary of project activities and outputs.

Members noted the need to document project achievements, communications, and future data priorities as part of project closure requirements.

4. Future Nursery Statistics Project (NY26001)

An overview of the proposed successor project (NY26001) was provided. The proposal has been submitted and is currently under evaluation by Hort Innovation. Clarification questions are being addressed by the project team.

Key proposed enhancements include:

- Annual collection of nursery industry statistics.
- State-based data summaries where sample sizes permit.
- Expanded stakeholder engagement with state associations.
- Continued benchmarking tool development.
- Economic Contribution Analysis in Year 2.
- Enhanced communication and extension activities.

Violet advised that the project remains under evaluation and an outcome is expected within the coming weeks.

5. Discussion: Future Data Priorities

A substantial discussion was held regarding future priorities for industry statistics.

State-Level Data

Members agreed that the highest priority should be improving the quality and availability of state-based statistics. Key points included:

- State-level data would increase relevance and value for growers and associations.
- More detailed regional and state information would support advocacy with state governments.
- Stronger state engagement is expected to improve survey participation rates.
- The proposed project includes one- to two-page state summary reports where statistically robust data is available.

Advocacy and Use of Industry Data

Members discussed the need to better communicate how industry statistics are used to support advocacy. Suggestions included:

- Demonstrating how statistics support lobbying and government engagement.
- Showcasing examples of data being used by GIA and state associations.
- Developing communications materials explaining the value of participation.
- Ensuring growers understand how survey data translates into industry outcomes.

Engagement with State Associations

The group supported more active engagement with state associations. Ideas discussed included:

- Presentations to state association boards and members.
- Regular briefings on survey findings.
- Webinars and online information sessions before annual data collection.
- Building stronger communication pathways through state CEOs.

Broader Green Industry Perspective

Members discussed the strategic direction of Greenlife Industry Australia and the importance of considering broader green industry participation in the future. Discussion points included:

- The industry's strategic shift from a purely nursery focus to a broader greenlife focus.
- Potential future opportunities to collect data from additional sectors.
- Recognition that any expansion would require separate consideration regarding project objectives and funding arrangements.
- Agreement that the matter should be explored further at an industry strategy level.

Benchmarking and Cost Data

Members discussed opportunities to improve benchmarking outputs. Suggestions included:

- Collecting additional information on production input costs.
- Tracking key industry costs such as labour, fuel, insurance and production inputs.
- Exploring a nursery industry cost index similar to other industry cost benchmarks.
- Investigating whether supplier data could be used to develop input-cost reporting without increasing survey burden on growers.
- Reviewing cost categories not previously captured through the survey process.
- There was limited support for collecting debt or leverage information due to concerns regarding complexity and limited industry-wide value. Instead, members favoured a stronger focus on practical cost and profitability indicators.

Economic Contribution Analysis

- Members welcomed the inclusion of an Economic Contribution Analysis in the proposed new project. It was noted that:
- Economic contribution data will strengthen industry advocacy.
- State-level economic contribution information will be particularly valuable when engaging with governments.
- The analysis will provide stronger evidence of the industry's value and impact.

Measuring Adoption and Outcomes

Discussion was held on whether the project adequately measures outcomes rather than simply producing outputs. Members suggested:

- Gathering feedback on how statistics and benchmarking tools influence business decisions.
- Measuring grower use of reports, dashboards and benchmarking tools.
- Including feedback opportunities within communications activities.
- Continuing to assess adoption and value delivered to the industry.

6. General Business

No additional business was raised.

Action Items:

Item	Responsible	Due Date
The final report and milestone submission will be circulated to PRG members	Celeste	End of August 2026
The PRG will be reconvened once the outcome of the NY26001 proposal process is known	Celeste	September 2026