

**Economic Contribution of the Green Industry to Colorado's Economy:
A 2016 Update**

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Executive Summary

- The total economic contribution of Colorado's green industry in 2015 was \$2.8 billion
 - Nursery, garden center and farm supply stores have the largest sectoral contribution of \$980 million, followed by landscaping services contributing \$716 million and golf courses and country clubs contributing \$525 million.
- From 1999 to 2015, Colorado's green industry grew by 90% from \$900 million in sales to \$1.7 billion. Since 2011, the industry has grown by 24%, outpacing the economic growth of the state during the same time period by 8%.
 - As of 2015, Colorado's green industry has recovered to pre-recession sales levels with 2015 sales 2% higher than 2007 sales (despite a notable dip for several years following 2008).
 - Nursery, garden center, and farm supply stores and landscaping services comprise over half of all green industry sales, representing 30% and 22% of total sales, respectively.
- From 1999-2015 green industry employment in Colorado grew by 23%, from 35,000 to 43,000, outpacing employment growth across the state by 4%.
 - Unlike revenue, employment has not yet recovered from pre-recession levels, with 2015 green industry employment levels remaining 1% below 2007 levels.
 - Landscaping services provides the largest share of green industry jobs with 21,000 jobs annually, accounting for 48% of green industry employment.
- From 1999-2015 green industry wages have increased by 87% from \$636 million to \$1.5 billion. Pre-recession wages peaked in 2007 at \$1.3 billion and since that time have increased steadily to \$1.5 billion, a 14% increase.

The Economic Contribution of Colorado's Green Industry: A 2016 Update

The environmental horticulture industry, or green industry, is comprised of a diverse supply chain of enterprises ranging from those producing plant materials (and their input providers) to those in direct interaction with the consumers, households and businesses seeking plants and landscapes, including producers, wholesalers, retailers and service activities. Subsequently, when trying to frame the economic activity this industry contributes, one must look at a wide array of products and services. This includes wholesale nursery, water supplies and irrigation services, landscaping services, nursery and garden center supply stores (including mass merchandisers with garden centers), nursery and tree production, cemeteries, floriculture production, golf courses, zoos and botanical gardens, landscape architectural services, and florists.

The green industry has historically been a fast growing segment of the U.S. economy, reaching peak growth in 2007 followed by a sharp decline as a result of the 2008 global recession; as of 2013 the U.S. green industry had yet to fully recover to pre-recession levels (Hodges, et al., 2015). In 2013, the U.S. green industry provided 1.6 million jobs and a direct economic contribution to the economy of \$136 billion (Hodges, et al., 2015). In Colorado, population growth is driving competition for water, land, and labor, and as this growth continues, it is important to track the progress of the green industry in Colorado and its economy.

The goal of this study is to provide an estimate of the economic contribution of Colorado's green industry to Colorado's economy, primarily by updating a more complete project reported in a 2008 study (Thilmany et al., 2008). For this reason, the reader should refer to the 2008 study for a complete explanation of methods and for a more detailed explanation of sectors that comprise the green industry that were fully vetted with industry leadership. To estimate the economic contribution, the Colorado green industry is divided into three types of

businesses: input suppliers, wholesaler/retailers, and end consumers. Input suppliers include water and irrigation systems (221310), flower, nursery stock, and florists' supplies merchant wholesalers (424930), and home and garden equipment repair and maintenance (811411). Input suppliers provide their goods and services to green industry wholesalers, retailers, and end consumers, thus the economic contribution of input suppliers is not explicitly calculated, but rather included in the economic contribution of the forward-linking green industry sectors.

The wholesale and retail sector includes those businesses that act as either wholesalers, retailers, or both. This sector includes nursery and tree production (111421), floriculture production (111422), outdoor power equipment stores (444210), nursery, garden center and farm supply stores (444220), and landscaping services (561730). End consumers include florists (453110), landscape architectural services (541320), zoos and botanical gardens (712130), golf courses and country clubs (713910), and cemeteries and crematories (812220). All industries used in this study, including their North American Industry Classification System (NAICS) codes, are presented in Table 1 along with the portion of revenue from each sector that can be attributed to the green industry and wholesale/retail adjustments.

To estimate the economic contribution of Colorado's green industry, retail sales data from the Colorado Department of Revenue (2016) were compiled for the 13 sectors listed Table 1 from 1999-2007 and 2011-2015¹ as well as employment data from the U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (2016) from 1999-2015. These data, combined with economic multiplier data from the commonly employed input-output model, IMPLAN (IMpact Analysis for PLANning) from the IMPLAN Group, LLC (2013), are used to

¹ Revenue data from 1999-2007 is from Thilmany et al. (2008) and revenue data from 2011-2015 is from the Colorado Department of Revenue. Data before 2011 is not available through the Colorado Department of Revenue due to a migration in accounting functions from a legacy mainframe-based system to the server-based Colorado Integrated Tax Architecture.

estimate the 2015 economic contribution of Colorado's green industry, including both the direct contribution as well as the impacts resulting from linkages of the industry to the state's broader economy.

Sector-share estimates as well as wholesale/retail adjustments shown in Table 1 are based on Thilmany et al. (2008). By using sector share estimates that were vetted by industry leadership and studies that collected more data in other U.S. states, we assume only a portion of some industries can be attributed to the green industry. It is assumed that 50% the revenue and employment in the water supply and irrigation (221310) sector is attributed to the green industry, 3% of home and garden equipment repair and maintenance (811411), 5% of outdoor power equipment stores (444210), and 33% of both landscaping services (561730) and cemeteries and crematories (812220).

Retail and wholesale adjustments are made due to missing data. The wholesale and retail data collected from the Colorado Department of Revenue and U.S. Bureau of Labor Statics are based on NAICS codes. These data do not include large box stores with garden centers because it is not possible to disentangle product specific data from the retail sales and employment data reported by these types of stores. Based on Thilmany et al. (2008), to account for unreported sales from large box stores with garden centers, sales from flower, nursery stock, and florists' supplies merchant wholesalers (424930), nursery, garden center, and farm supply stores (444220), and florists (453110) are increased by 35%.

Additionally, many businesses, organization, cities, and counties have landscaped grounds that they manage internally and are thus not included in the sales and employment data reported by the Colorado Department of Revenue and the Bureau of Labor Statistics. Based on Thilmany et al. (2008), unreported data is accounted for by increasing sales and employment by

20% in the following sectors: water and irrigation systems (221310), home and garden equipment repair and maintenance (811411), nursery and tree production (111421), floriculture production (111422), outdoor power equipment stores (444210), landscaping services (561730), and landscape architectural services (541320).

From 1999 to 2015, the Colorado green industry grew by 90% from \$900 million in sales to \$1.7 billion (Figure 1 and Table 2). Since 2011, the industry has grown by 24%, outpacing the economic growth of the state during the same time period by 8% (Colorado Department of Revenue, 2016). During the 2008 recession, the green industry was hit particularly hard throughout the country including Colorado (Hodges, et al., 2015), but as of 2015, Colorado's green industry has recovered to pre-recession levels with 2015 sales 2% higher than 2007 sales.

Looking at the sectoral trends, with the exception of landscape architectural services, all green industry sectors have grown between 2011 and 2015 (Figure 2). The highest revenue generating sector in Colorado's green industry is nursery, garden center, and farm supply stores, with sales of \$519 million, growing by 31% since 2011 and recovering to revenues 13% higher than pre-recession levels. Landscaping services is the second largest revenue generating sector with \$378 million in sales and 15% growth since 2011. This sector has not yet recovered to pre-recession levels with 2015 sales 3% below 2007 sales. The sectors with the highest rates of growth since 2011 include water supply and irrigation services (74%), floriculture production (53%), and flower, nursery stock, and florists' supplies merchant wholesalers (43%).

Two sectors, nursery, garden center, and farm supply stores and landscaping services comprise over half of all green industry sales, representing 30% and 22% of total sales, respectively (Figure 3). Golf courses and country clubs, water supply and irrigation systems,

landscaping and florists represent 16%, 10% and 8% of revenue, respectively. All remaining sectors represent 4% or less of the total revenue generated by the industry.

From 1999-2015 green industry employment in Colorado grew by 23%, from 35,000 to 43,000, outpacing employment growth across the state by 4% (Figure 4 and Table 3). Green industry employment reached its highest level in 2007 at 43,700 before the economic recession of 2008. Employment levels reached a low in 2011 of 37,300 and have since increased by 16%, growing to 43,000 jobs and outpacing statewide growth during the same time period by 3%. Unlike revenue, employment has not yet recovered from pre-recession levels, with 2015 green industry employment levels remaining 1% below 2007 levels. Landscaping services provides the greatest number of green industry jobs with 21,000 jobs annually², accounting for 48% of green industry employment (Figure 5). This is followed by golf courses and country clubs and water supply and irrigation systems, providing 6,100 and 4,600 jobs and representing 14% and 11% of green industry jobs, respectively. Employment growth in Colorado's green industry since 1999 has been relatively modest in most sectors and negative in some, with the exception of landscaping services, which has grown from 11,000 to 21,000 jobs annually (Figure 6).

From 1999-2015 green industry wages have increased by 87% from \$636 million to \$1.5 billion (Figure 7 and Table 4). Pre-recession wages peaked in 2007 at \$1.3 billion and since that time have increased steadily to \$1.5 billion, a 14% increase. Landscaping services provides 47% of the wages earned in the green industry, followed by water supply and irrigation systems and golf courses and country clubs at 17% and 11%, respectively. Although golf courses and country clubs provide a higher number of jobs, water supply and irrigation systems provide a larger share

²This is similar to a recent survey of Colorado landscaping businesses that estimated 22,000 jobs in the sector with a growth rate of 13% since 2009 (Leeds School of Business-Business Research Division, 2016). During the same time period, this study estimates job growth in landscaping services of 14%.

of the wages. Of the sectors that provide over 2% of green industry wages, nursery, garden and farm supply stores have seen the largest percentage increase in wages of 46% since the 2008 recession, followed by water supply and irrigation systems and landscaping services, increasing 28% and 17%, respectively (Figure 8).

Next, we use IMPLAN data (IMPLAN Group, LLC, 2013) to estimate the economic contribution of Colorado's green industry. IMPLAN provides estimates of the direct, indirect and induced contribution of a particular industry to the broader economy, the sum of which constitutes the total contribution. The direct contribution of the green industry is the revenue, jobs and wages presented in Tables 2, 3 and 4 for the wholesale/retail and end consumer sectors. The indirect and induced contributions of the green industry are calculated based on IMPLAN's economic multipliers, which represent the extent to which the green industry is linked to other industries in Colorado. The indirect contribution of the green industry results from the purchases of inputs from other industries in Colorado. In order to avoid double counting, the green industry sectors categorized as inputs are not directly included in the contribution analysis. Following the logic above, the output of these sectors is already captured through the indirect contribution multiplier. The induced contribution of the green industry accumulates when the labor income resulting from green industry employment is spent on local goods and services by households employed by the sector.

The direct economic contribution of Colorado's green industry in 2015 was \$1.5 billion, resulting in indirect and induced contributions of \$522 and \$814 million, respectively, leading to a total economic contribution of \$2.8 billion (Table 5). Nursery, garden center and farm supply stores have the largest sectoral contribution of \$980 million, followed by landscaping services contributing \$716 million and golf courses and country clubs contributing \$525 million.

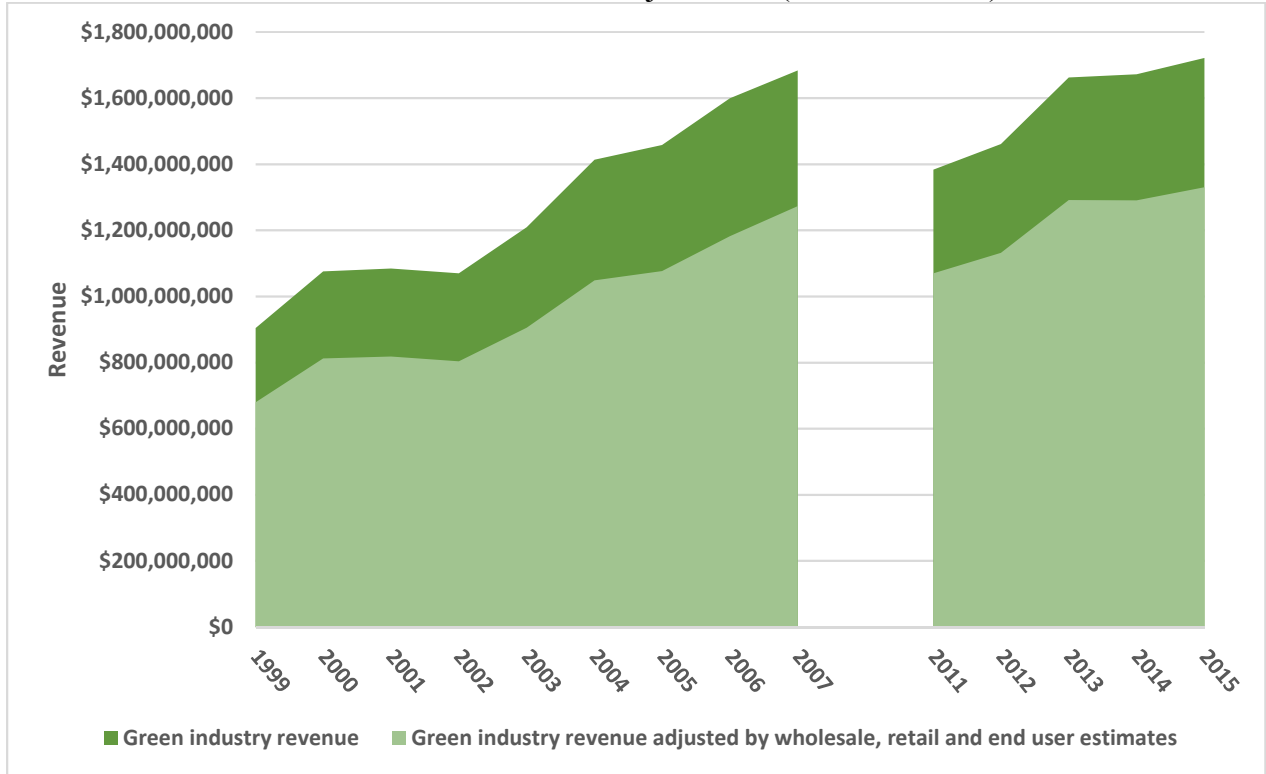
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Table 1. North American Industry Classification System (NAICS) key for the green industry, including the proportion of sectoral revenue and employment attributed to Colorado's green industry and retail/end user adjustments

NAICS	Industry Description	% of sector allocated to the green industry	Retail (35%) and end user (20%) adjustments
	Inputs		
221310	Water Supply and Irrigation Systems	50%	20%
424930	Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	100%	35%
811411	Home and Garden Equipment Repair and Maintenance	3%	20%
	Wholesale/Retail		
111421	Nursery and Tree Production	100%	20%
111422	Floriculture Production	100%	20%
444210	Outdoor Power Equipment Stores	5%	20%
444220	Nursery, Garden Center, and Farm Supply Stores	100%	35%
561730	Landscaping Services	33%	20%
	End Users		
453110	Florists	100%	35%
541320	Landscape Architectural Services	100%	20%
712130	Zoos and Botanical Gardens	100%	0%
713910	Golf Courses and Country Clubs	100%	0%
812220	Cemeteries and Crematories	33%	0%

Figure 1. Revenue generated by Colorado’s green industry from 1999-2015*, including revenue with and without wholesale, retail and end user adjustments (nominal dollars)



*Revenue data from 2008, 2009 and 2010 is not available through the Colorado Department of Revenue due to a migration in accounting functions from a legacy mainframe-based system to the server-based Colorado Integrated Tax Architecture.

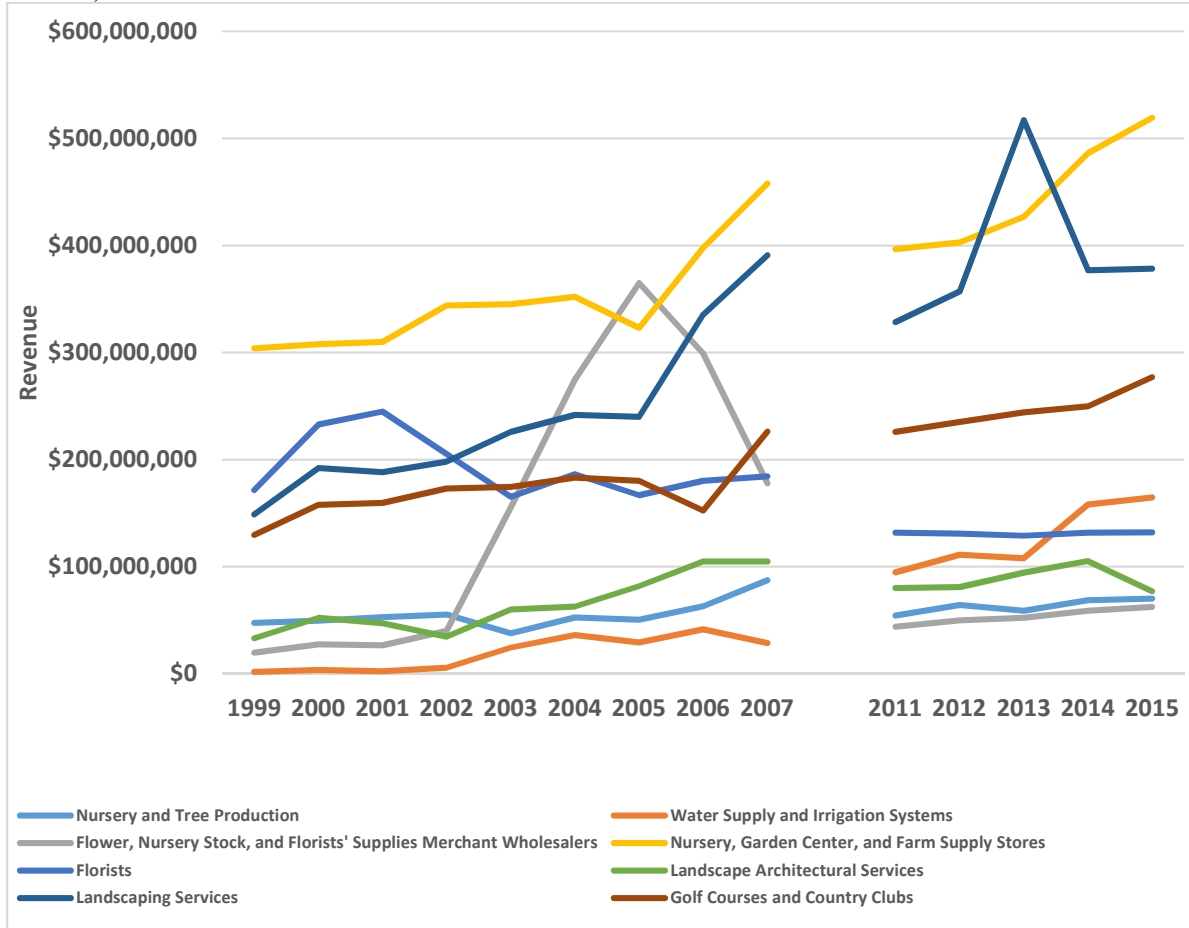
Table 2. Revenue generated by Colorado's green industry from 1999-2007 and 2011-2015, in millions (nominal dollars)

Industry Definition	1999	2000	2001	2002	2003	2004	2005	2006	2007
End Consumers									
Florists	\$171.6	\$232.8	\$245.0	\$205.2	\$165.3	\$186.6	\$166.7	\$180.3	\$184.4
Landscape Architectural Services	\$33.2	\$52.2	\$47.2	\$34.6	\$60.0	\$62.8	\$81.8	\$105.0	\$104.8
Zoos and Botanical Gardens	\$0.0	\$0.3	\$1.2	\$1.5	\$1.6	\$1.6	\$1.1	\$1.1	\$1.3
Golf Courses and Country Clubs	\$129.6	\$157.9	\$159.7	\$172.9	\$174.6	\$183.3	\$180.2	\$152.5	\$226.2
Cemeteries and Crematories	\$23.7	\$26.6	\$25.1	\$6.0	\$13.5	\$13.8	\$12.5	\$14.4	\$15.9
Wholesale/Retail									
Nursery and Tree Production	\$47.6	\$49.7	\$52.9	\$55.4	\$37.9	\$52.5	\$50.4	\$63.1	\$87.4
Floriculture Production	\$22.9	\$23.4	\$24.9	\$5.6	\$4.2	\$5.4	\$4.6	\$4.9	\$5.1
Outdoor Power Equipment Stores	\$1.0	\$1.2	\$1.2	\$0.4	\$1.1	\$2.5	\$2.5	\$3.4	\$3.6
Nursery, Garden Center, and Farm Supply Stores	\$304.0	\$308.0	\$310.1	\$344.1	\$345.3	\$352.2	\$323.2	\$397.8	\$457.7
Landscaping Services	\$148.7	\$192.2	\$188.4	\$198.1	\$225.9	\$241.8	\$240.0	\$335.4	\$390.9
Input Suppliers									
Water Supply and Irrigation Systems	\$1.8	\$3.7	\$2.5	\$5.6	\$24.4	\$36.3	\$29.2	41.7	\$28.6
Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	\$19.7	\$27.5	\$26.5	\$40.1	\$155.4	\$274.7	\$364.9	299.2	\$177.7
Home and Garden Equipment Repair and Maintenance	\$0.2	\$0.2	\$0.2	\$0.2	\$0.3	\$0.3	\$0.4	0.7	\$0.7
All Green Industry Sectors	\$546.0	\$605.8	\$606.5	\$649.5	\$794.4	\$965.6	\$1,015.4	\$1,146.2	\$1,151.8

Table 3 continued

Industry Definition	2011	2012	2013	2014	2015
End Consumers					
Florists	\$131.9	\$130.9	\$129.0	\$131.8	\$132.0
Landscape Architectural Services	\$80.2	\$81.0	\$94.5	\$105.3	\$77.0
Zoos and Botanical Gardens	\$2.8	\$3.1	\$3.5	\$5.1	\$3.9
Golf Courses and Country Clubs	\$226.1	\$235.2	\$244.1	\$249.8	\$277.1
Cemeteries and Crematories	\$15.5	\$15.4	\$16.8	\$17.0	\$21.0
Wholesale/Retail					
Nursery and Tree Production	\$54.4	\$64.3	\$58.9	\$68.9	\$70.2
Floriculture Production	\$5.7	\$6.4	\$6.8	\$7.8	\$8.8
Outdoor Power Equipment Stores	\$2.9	\$3.2	\$3.6	\$4.7	\$5.5
Nursery, Garden Center, and Farm Supply Stores	\$396.6	\$402.8	\$426.8	\$486.3	\$519.3
Landscaping Services	\$328.3	\$357.1	\$517.1	\$376.9	\$378.5
Input Suppliers					
Water Supply and Irrigation Systems	\$94.7	\$111.1	\$107.8	\$158.2	\$164.7
Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	\$43.8	\$50.0	\$52.4	\$58.9	\$62.5
Home and Garden Equipment Repair and Maintenance	\$0.5	\$0.6	\$0.9	\$1.0	\$1.0
All Green Industry Sectors	\$927.0	\$995.5	\$1,174.3	\$1,162.6	\$1,210.6

Figure 2. Sectoral revenue trends* for the Colorado green industry 1999-2015** (nominal dollars)



* Only includes the sectors that account for over 1% of green industry sales

** Revenue data from 2008, 2009 and 2010 is not available through the Colorado Department of Revenue due to a migration in accounting functions from a legacy mainframe-based system to the server-based Colorado Integrated Tax Architecture.

Figure 3. Share of 2015 revenue by industry for all Colorado green industry sectors

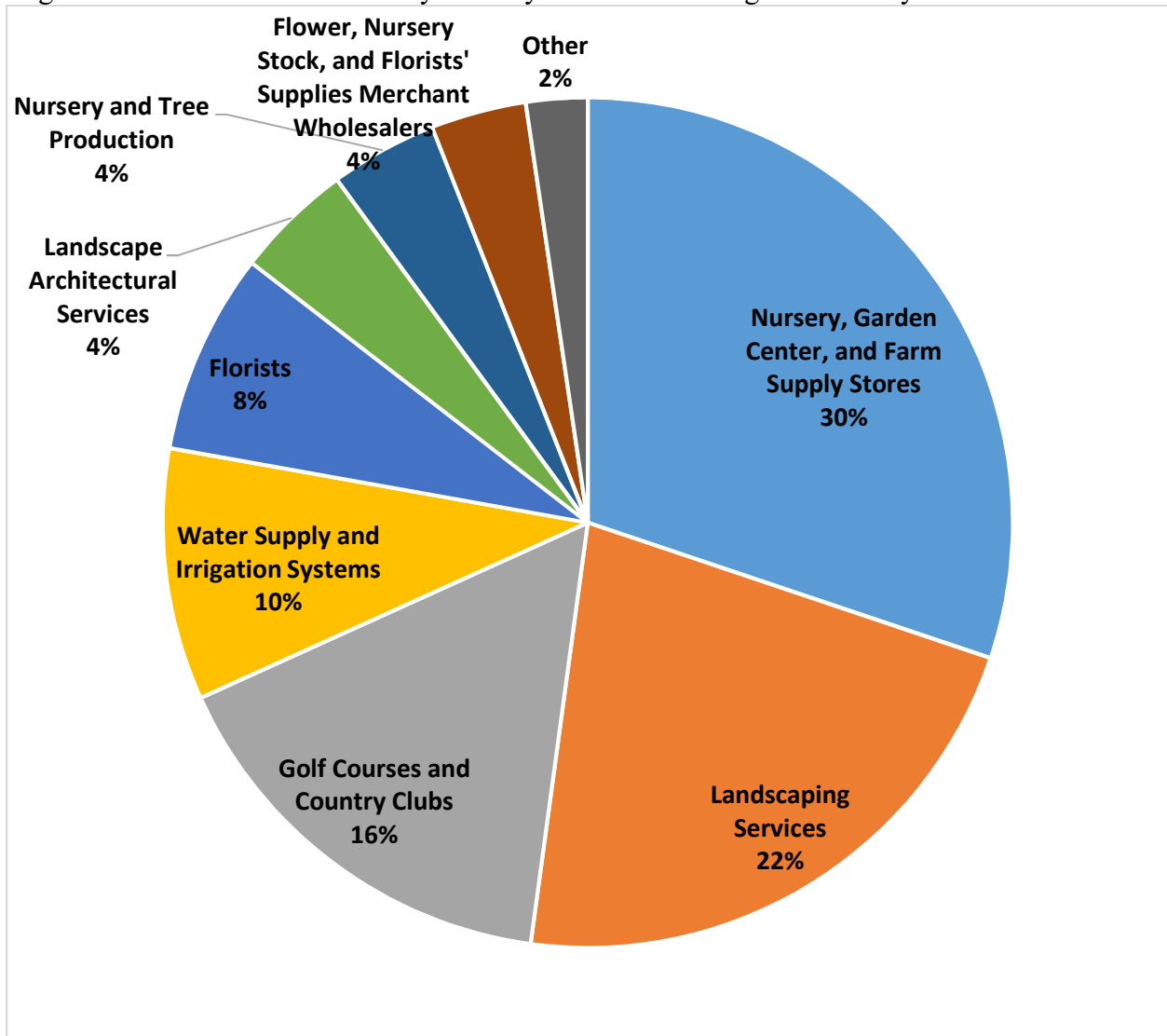


Figure 4. Colorado green industry annual employment levels from 1999-2015, including employment levels with and without end user adjustments

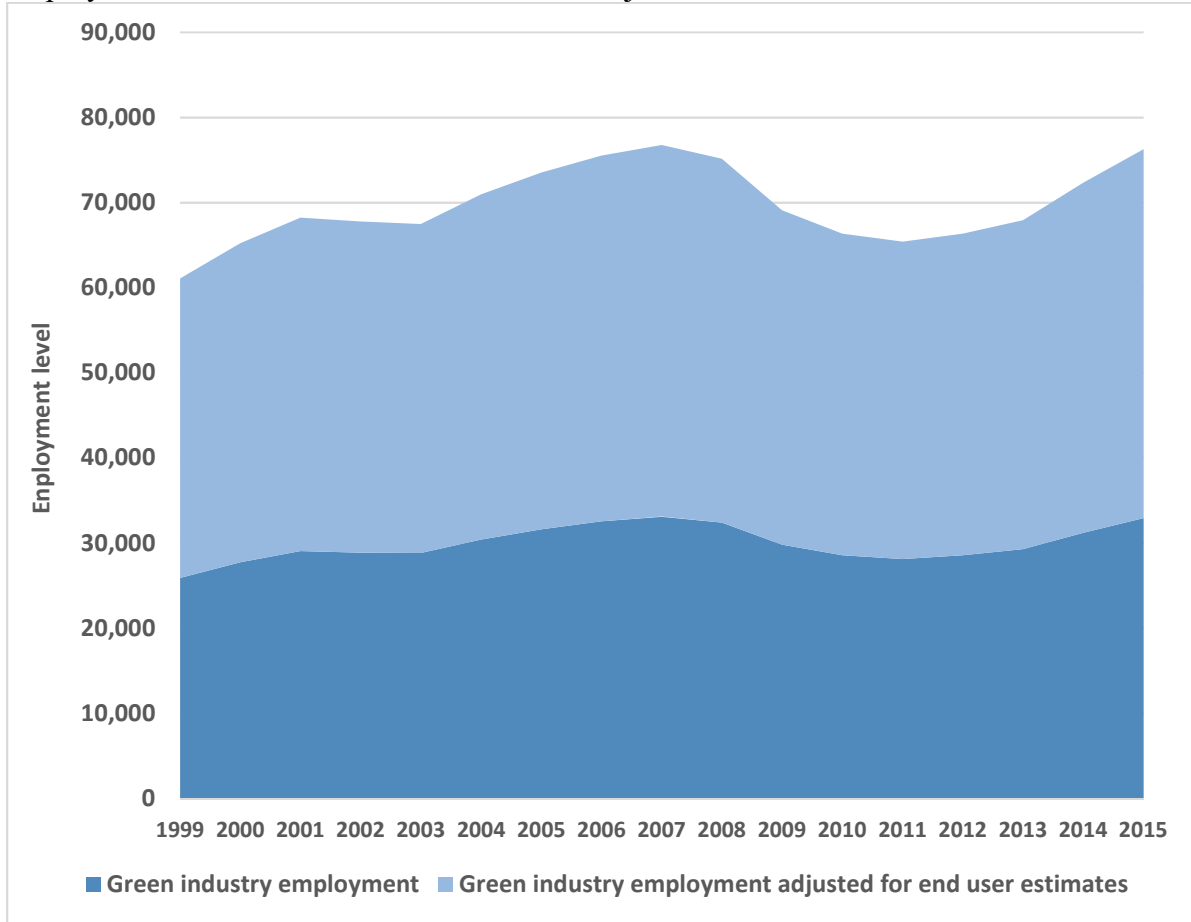


Table 4. Annual employment levels attributed to the green industry from 1999-2015

Industry Definition	1999	2000	2001	2002	2003	2004	2005	2006	2007
End Consumers									
Florists	3,212	3,346	3,268	3,063	2,825	2,714	2,618	2,531	2,318
Landscape Architectural Services	1,394	1,610	1,704	1,661	1,509	1,510	1,658	1,746	1,699
Zoos and Botanical Gardens	390	414	405	407	368	366	597	675	735
Golf Courses and Country Clubs	4,255	4,472	4,640	4,850	5,175	5,311	5,516	5,604	5,668
Cemeteries and Crematories	543	532	528	561	518	500	482	454	449
Wholesale/Retail									
Nursery and Tree Production	1,934	2,030	2,014	1,880	1,746	1,880	1,848	1,764	1,670
Floriculture Production	1,335	1,408	1,328	1,430	1,410	1,473	1,551	1,585	1,721
Outdoor Power Equipment Stores	224	223	220	198	214	221	216	218	229
Nursery, Garden Center, and Farm Supply Stores	3,094	3,100	3,114	3,174	2,751	2,755	2,575	2,566	2,649
Landscaping Services	13,454	14,868	16,384	16,126	16,655	18,379	19,296	20,318	20,896
Input Suppliers									
Water Supply and Irrigation Systems	3,838	3,849	3,949	3,985	4,031	4,116	4,139	4,183	4,249
Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	1,454	1,542	1,488	1,397	1,269	1,203	1,283	1,229	1,282
Home and Garden Equipment Repair and Maintenance	46	95	118	146	151	108	118	91	108
All Green Industry Sectors	35,172	37,487	39,157	38,878	38,622	40,536	41,897	42,963	43,672

Table 3 continued

Industry Definition	2008	2009	2010	2011	2012	2013	2014	2015
End Consumers								
Florists	2,083	1,825	1,697	1,642	1,600	1,608	1,655	1,634
Landscape Architectural Services	1,644	1,241	1,019	944	940	1,026	1,089	1,193
Zoos and Botanical Gardens	789	810	842	876	932	964	1,040	1,073
Golf Courses and Country Clubs	5,924	5,807	5,615	5,418	5,446	5,647	5,856	6,080
Cemeteries and Crematories	488	431	418	412	392	402	426	439
Wholesale/Retail								
Nursery and Tree Production	1,549	1,305	1,085	1,086	1,033	1,023	1,090	1,116
Floriculture Production	1,456	1,506	1,651	1,611	1,644	1,648	1,546	1,626
Outdoor Power Equipment Stores	219	179	183	170	180	175	181	188
Nursery, Garden Center, and Farm Supply Stores	2,760	2,512	2,651	2,722	2,734	2,666	3,342	3,622
Landscaping Services	20,191	18,250	17,229	16,951	17,453	18,046	19,504	20,871
Input Suppliers								
Water Supply and Irrigation Systems	4,351	4,409	4,443	4,420	4,461	4,501	4,516	4,563
Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	1,185	923	865	948	905	848	795	834
Home and Garden Equipment Repair and Maintenance	91	78	73	75	75	84	88	86
All Green Industry Sectors	42,730	39,275	37,769	37,274	37,793	38,637	41,128	43,324

Figure 5. Share of 2015 employment by industry for all green industry sectors

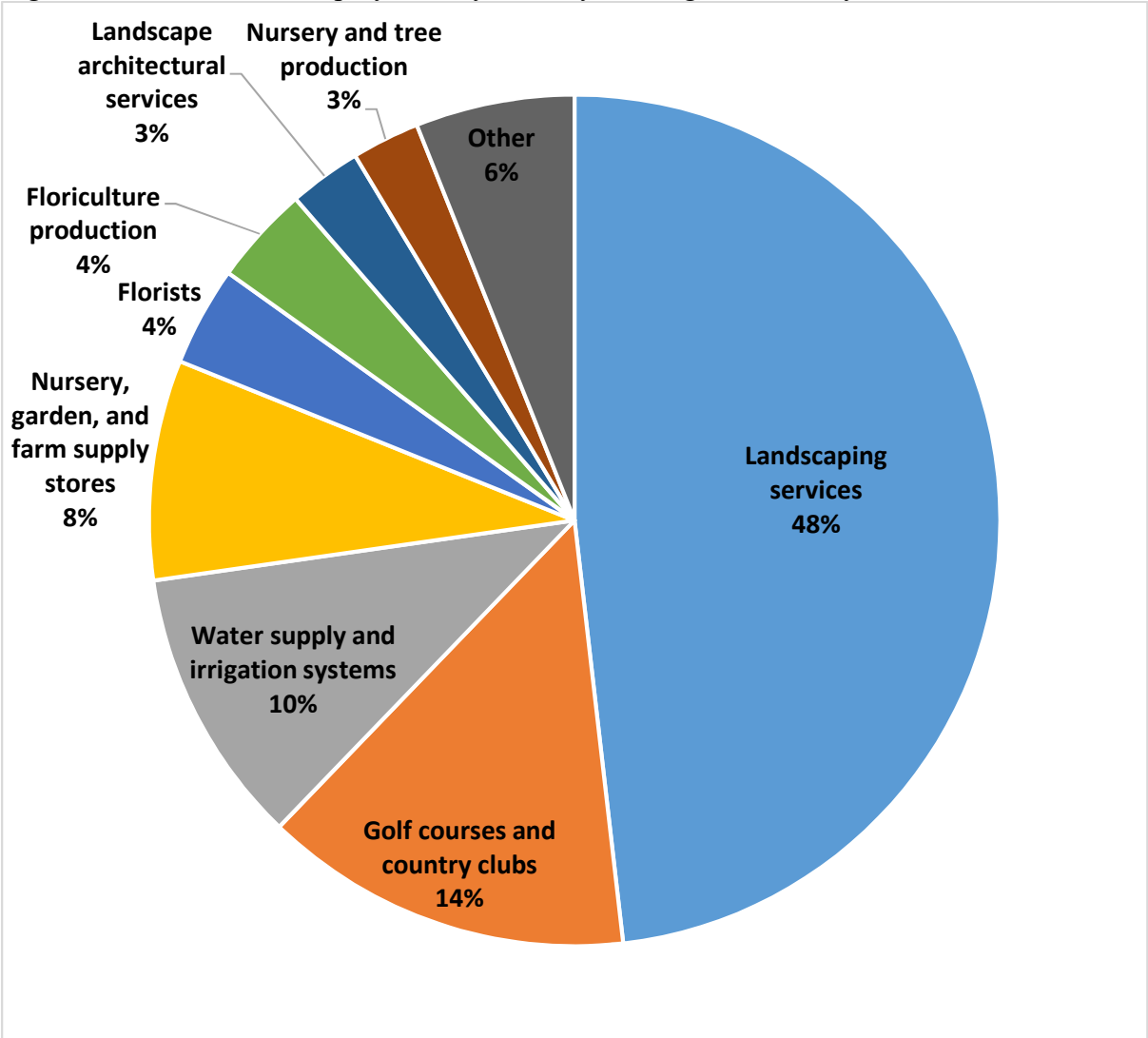
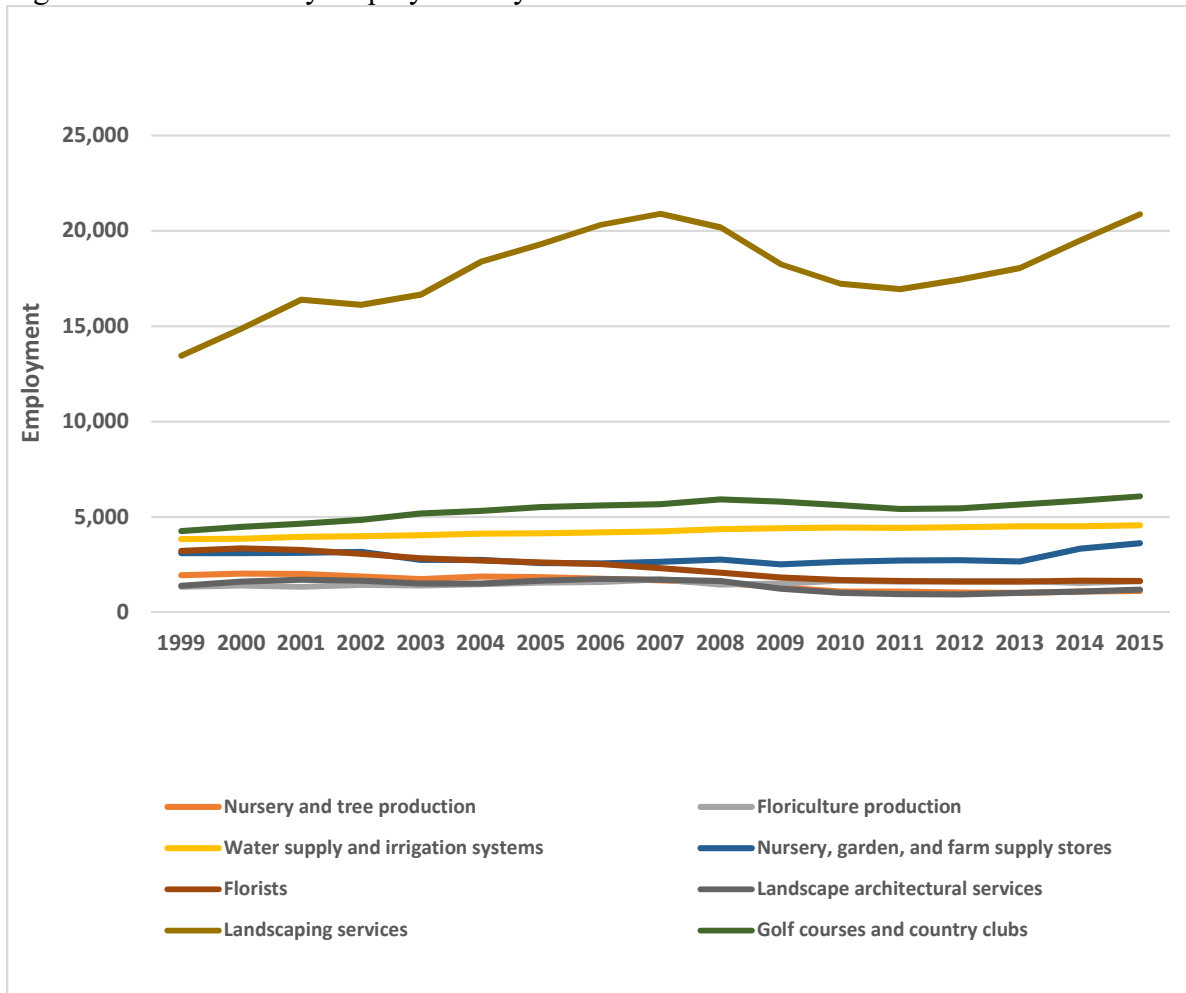


Figure 6. Green industry employment by sector* from 1999-2015



* Only includes the sectors that account for over 2% of green industry employment

Figure 7. Colorado green industry annual wages from 1999-2015, including employment levels with and without end user adjustments (nominal dollars)

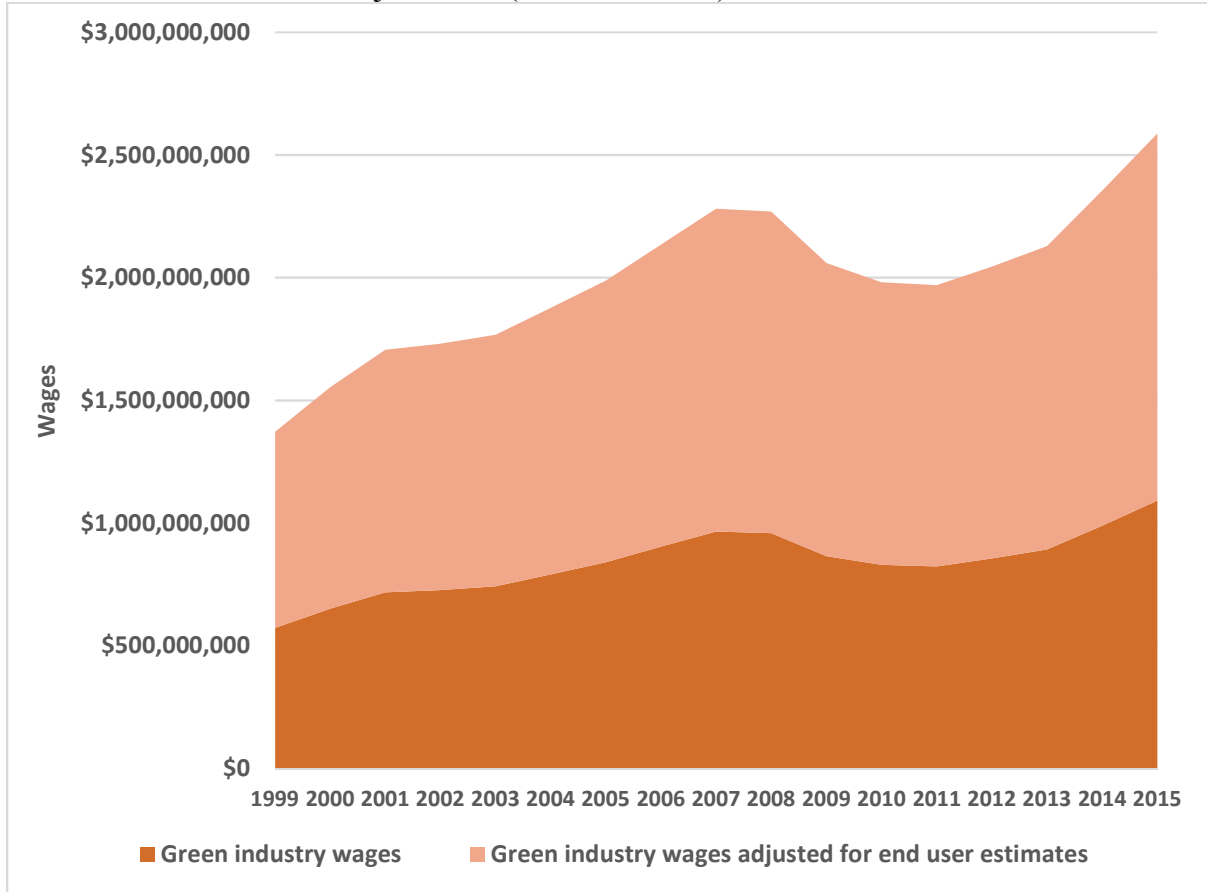


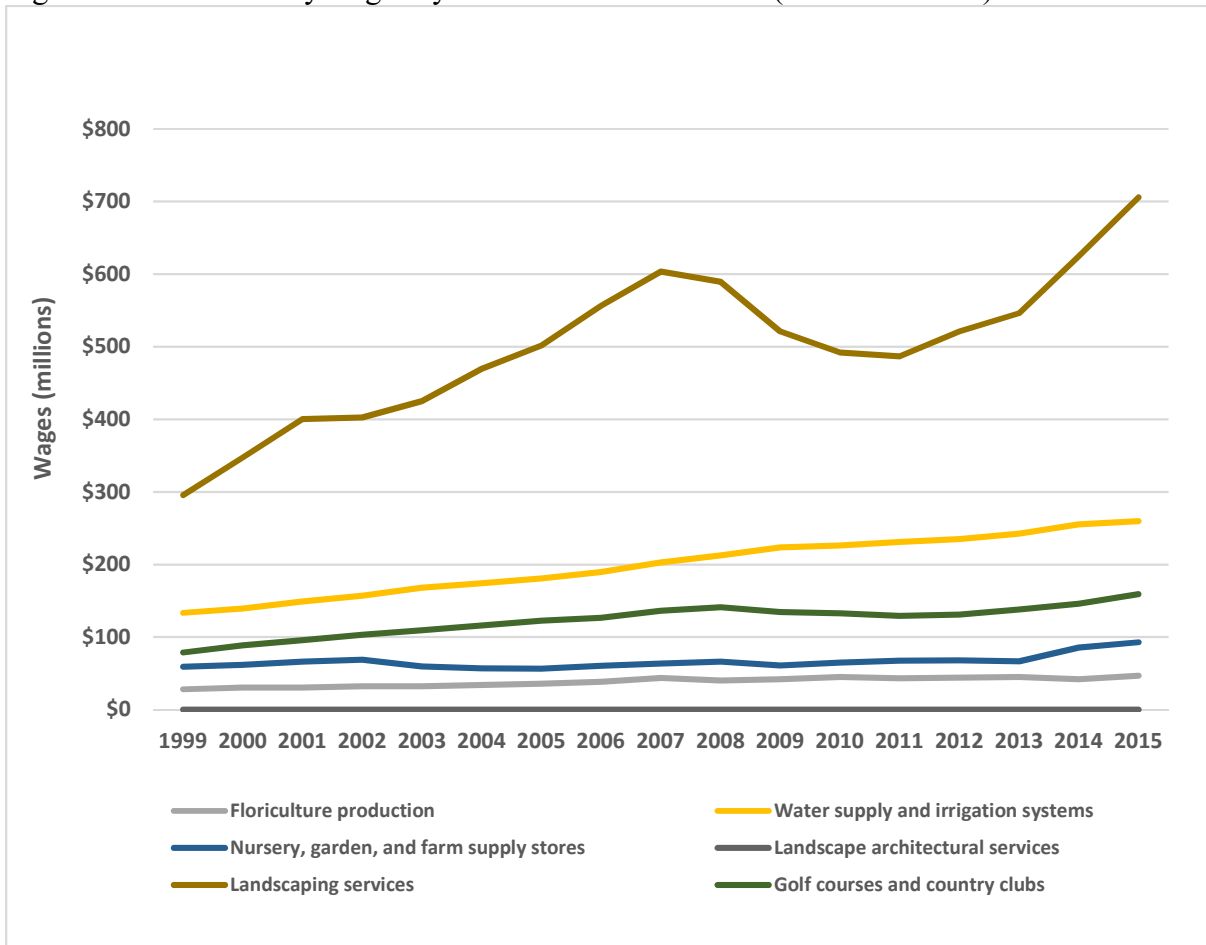
Table 4. Annual wages attributed to the green industry from 1999-2015, in millions (nominal dollars)

Industry Definition	1999	2000	2001	2002	2003	2004	2005	2006	2007
End Consumers									
Florists	\$42.25	\$44.95	\$44.83	\$43.45	\$40.67	\$38.97	\$39.53	\$37.55	\$37.65
Landscape Architectural Services	\$51.94	\$63.19	\$71.83	\$72.87	\$70.30	\$75.21	\$84.10	\$92.68	\$93.51
Zoos and Botanical Gardens	\$9.36	\$11.21	\$11.37	\$10.61	\$9.19	\$9.01	\$14.73	\$16.26	\$18.18
Golf Courses and Country Clubs	\$78.73	\$88.89	\$95.71	\$103.47	\$109.22	\$115.98	\$122.68	\$126.42	\$136.37
Cemeteries and Crematories	\$10.35	\$11.60	\$11.91	\$13.84	\$12.95	\$13.67	\$13.26	\$13.73	\$13.93
Wholesale/Retail									
Nursery and Tree Production	\$46.91	\$51.84	\$54.28	\$50.37	\$49.59	\$51.97	\$50.36	\$49.53	\$47.70
Floriculture Production	\$28.11	\$30.72	\$30.73	\$32.28	\$32.49	\$34.24	\$35.59	\$38.61	\$43.77
Outdoor Power Equipment Stores	\$5.02	\$5.28	\$5.89	\$4.87	\$6.04	\$6.07	\$5.79	\$6.12	\$7.34
Nursery, Garden Center, and Farm Supply Stores	\$59.27	\$61.99	\$66.30	\$69.05	\$59.61	\$57.10	\$56.54	\$60.54	\$63.66
Landscaping Services	\$295.56	\$347.65	\$400.53	\$402.67	\$425.00	\$469.56	\$501.77	\$556.30	\$603.55
Input Suppliers									
Water Supply and Irrigation Systems	\$133.37	\$139.43	\$149.09	\$156.83	\$167.88	\$174.09	\$180.91	\$189.54	\$203.01
Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	\$36.84	\$42.24	\$43.23	\$39.56	\$38.12	\$36.87	\$39.64	\$41.69	\$43.71
Home and Garden Equipment Repair and Maintenance	\$0.98	\$2.35	\$2.90	\$3.73	\$3.98	\$2.89	\$3.13	\$2.37	\$2.80
All Green Industry Sectors	\$798.68	\$901.34	\$988.58	\$1003.6	\$1025.0	\$1085.6	\$1148.0	\$1231.3	\$1315.2

Table 4 continued

Industry Definition	2008	2009	2010	2011	2012	2013	2014	2015
End Consumers								
Florists	34.92	30.82	28.52	28.23	27.93	28.73	30.69	31.64
Landscape Architectural Services	91.92	66.03	51.84	47.84	47.96	54.36	59.87	67.84
Zoos and Botanical Gardens	20.81	22.26	23.72	25.34	28.07	29.22	32.11	34.45
Golf Courses and Country Clubs	141.01	134.71	132.99	129.33	131.20	138.05	146.16	159.18
Cemeteries and Crematories	15.95	13.80	14.16	14.42	13.30	14.10	15.31	16.22
Wholesale/Retail								
Nursery and Tree Production	44.72	37.74	32.13	30.82	30.30	30.21	32.78	37.15
Floriculture Production	40.08	41.94	44.92	43.10	44.33	45.20	42.03	46.95
Outdoor Power Equipment Stores	7.81	6.22	6.12	6.03	6.79	6.68	6.89	7.48
Nursery, Garden Center, and Farm Supply Stores	66.25	60.94	64.95	67.51	68.17	66.47	85.41	92.83
Landscaping Services	589.71	521.17	492.07	486.81	521.23	546.39	624.96	705.88
Input Suppliers								
Water Supply and Irrigation Systems	212.47	223.47	226.42	230.92	235.29	242.45	255.22	259.82
Flower, Nursery Stock, and Florists' Supplies Merchant Wholesalers	42.23	32.31	31.15	33.37	31.87	31.57	30.98	33.78
Home and Garden Equipment Repair and Maintenance	2.57	2.40	2.29	2.27	2.28	2.02	2.21	2.16
All Green Industry Sectors	1310.45	1193.81	1151.30	1145.99	1188.72	1235.45	1364.61	1495.38

Figure 8. Green industry wages by sector* from 1999-2015 (nominal dollars)



* Only includes the sectors that account for over 2% of green industry wages

Table 5. Economic contribution of for each of Colorado’s green industry sectors in 2015 in terms of output, in millions

Industry Definition	Direct output contribution	Indirect output contribution	Induced output contribution	Total output contribution
End Consumers				
Florists	\$132.0	\$32.9	\$70.0	\$234.9
Landscape Architectural Services	\$77.0	\$28.4	\$53.8	\$159.2
Zoos and Botanical Gardens	\$3.9	\$1.6	\$1.5	\$6.9
Golf Courses and Country Clubs	\$277.1	\$94.7	\$152.9	\$524.7
Cemeteries and Crematories	\$21.0	\$8.0	\$15.3	\$44.3
Wholesale/Retail				
Nursery and Tree Production	\$70.2	\$18.8	\$47.2	\$136.3
Floriculture Production	\$8.8	\$2.4	\$5.9	\$17.1
Outdoor Power Equipment Stores	\$5.5	\$2.0	\$2.9	\$10.5
Nursery, Garden Center, and Farm Supply Stores	\$519.3	\$184.7	\$275.9	\$979.9
Landscaping Services	\$378.5	\$149.0	\$188.8	\$716.3
Total	\$1,493.3	\$522.4	\$814.2	\$2,829.8