2026 AmericanHort Fall Meeting

Industry Pulse – Voices from Across the Industry – Panel Discussion Notes

Each Advisory Council had a representative participate in this panel discussion. The group talked about current business conditions, challenges, opportunities, innovations, what to watch out for, and shared thoughts and ideas on how AmericanHort can best impact the industry.

Advisory Council Panel Representatives:

Garden Retail – Liz Lark-Riley
Generation Next – Lyndsey Maruna
Greenhouse – Broch Martindale
Interior Plantscape – Molly Turpin
Landscape – David McKinney
Nursery – John Terhesh
Spanish – Juan Ponte

Moderated by: Mary Beth Cowardin

- **Industry Consolidation and Private Equity:** John, Brad, Genevieve, Carrie, and other participants discussed the growing role of private equity and consolidation across nurseries, suppliers, landscapers, and interior plantscape businesses, including the need for alternatives that preserve independent businesses and improve growers' negotiating power.
    - **Market Power Shift:** John explained that consolidation is increasing on both the supply side and the customer side, leaving nurseries with less negotiating leverage in both directions. Suppliers can raise input prices, while large landscapers and re-wholesalers can resist corresponding price increases, forcing nurseries to absorb costs or risk scrapping unsold products.
    - **Private Equity Changes:** John said the trend became materially visible during the prior 12–18 months. Brad added that newer private-equity investors are more patient than earlier investors, often seeking land and established operations rather than pursuing only short-term profit extraction; the Hoffman Group was cited as having acquired several major industry businesses.
    - **Business Responses:** Participants identified vertical integration, direct-to-consumer sales, grower cooperatives, and specialized niches as ways to respond. Larger businesses may have more customer diversification, while smaller nurseries are building garden-center fleets or focusing on products and services competitors cannot easily copy.

- **Ownership Alternatives:** Genevieve, Jake, and others suggested that AmericanHort could help owners approaching retirement explore alternatives to a private-equity sale, including cooperative structures, Farm Credit, and other agricultural financing. Participants emphasized that nursery land values make private equity purchases attractive even if the operating business later declines.

- **Industry Value and Quality:** Carrie and other participants raised concerns that some acquisitions reduce service quality, shift focus from service to sales, or drive prices down. Patricia noted that private equity can also produce positive outcomes, but the group agreed that the industry must adapt to its continued presence rather than expect the trend to stop.

- **Local Electrification and Regulatory Pressures:** David, Genevieve, Rachel, and other participants described the operational and financial challenges of converting landscape fleets to electric equipment, while discussing local advocacy, customer education, and collaboration with technical associations as possible responses.

  - **Equipment Conversion Costs:** David explained that electric equipment requires high upfront investment, expensive batteries, additional charging capacity, training, and sometimes mixed gas-and-electric fleets for different clients. Batteries may not last an entire workday, and the payback period for equipment such as leaf blowers remains substantial.

  - **Local Rules:** Participants clarified that many restrictions originate with municipalities, neighborhoods, or homeowners' associations rather than state or federal governments. Two clients on the same block may face different requirements, particularly concerning noise and gas-powered equipment.

  - **Alternative Compliance:** A participant described using electric equipment successfully in a nursery because the operation had centralized charging access and did not need to change a mobile fleet. In Maine, associations have addressed differing pesticide rules by showing homeowners the cost difference between compliance options and encouraging affected residents to communicate with local officials.

  - **Education Resources:** In response to a question about equipment best practices, participants identified state landscape associations, the National Association of Landscape Professionals, the Outdoor Power Equipment Institute, and Equip Expo as sources of information. AmericanHort's potential role was framed as coordinating education and partnerships rather than replacing specialized organizations.

- **Advocacy Approach:** Rachel said the organization should monitor local and state developments, explain practical effects on growers, landscapers, and homeowners, and use end users to communicate with officials. Participants emphasized presenting choices, costs, safety, environmental effects, and long-term outcomes rather than treating the issue as a simple pro- or anti-regulation debate.

- **Workforce Development and Career Pathways:** Lindsay, Juan, Emily, Molly, Broch, Gladys, and other participants identified affordability, work-life expectations, unclear advancement paths, and limited public awareness as workforce barriers, and proposed structured development, internships, mentorship, and stronger industry storytelling.

    - **Younger Worker Expectations:** Lindsay said younger professionals increasingly expect balanced lifestyles, flexible or hybrid work where possible, flexible hours, childcare support, and mental-health resources. Participants connected retention challenges to housing costs, student loans, inflation, and compensation that has not kept pace with living expenses.

    - **Career Path Clarity:** Juan said employees and early-career professionals often lack a clear understanding of how to progress toward management, leadership, or executive roles. They recommended regular conversations about employees' goals, realistic timelines, required skills, responsibilities, and available training, for both English- and Spanish-speaking employees.

    - **Spanish-Speaking Talent:** Juan explained that language barriers can obscure the professional and technical experience of Spanish-speaking workers, including people with agricultural degrees, machinery certifications, growing experience, and business backgrounds. Participants recommended asking employees directly about their skills and creating advanced career paths rather than treating Spanish-speaking workers only as entry-level labor.

    - **Skills-Based Development:** Emily described a skill-card program in which employees, including H2A workers, discuss their existing capabilities and identify skills they want to develop, such as computer operation or English. Training is then aligned with the company's needs, and participants noted that the program was built with field input rather than being limited to HR.

    - **Succession Planning:** Juan and Gladys encouraged leaders to train the people who will eventually take over their responsibilities. Gladys said career discussions during performance reviews can identify employees who want

more responsibility, while developing successors can free current leaders to move into broader roles instead of retaining knowledge within one person.

  - **Recruitment Exposure:** Molly described inviting college students to tour interior plantscape operations; one visitor later applied specifically because of a tour completed two years earlier. Participants also recommended internships, stronger student participation at Cultivate, engagement with 4-H and FFA, outreach to parents, collaboration with Seed Your Future, and partnerships with botanical gardens and agricultural educators.

- **Spanish Advisory Council Inclusion:** Juan and Alejandra described the Spanish Advisory Council as an inclusion and advancement effort intended to reduce cultural and language barriers, expand Spanish-language education, and create professional and leadership pathways across the industry.

  - **Council Purpose:** Juan clarified that the council is not intended to create a separate organization or divide the industry. Its purpose is to make Spanish-speaking professionals more visible, strengthen participation, and provide a channel for people who may not engage fully because of cultural or language barriers.

  - **Career Advancement:** The council is working to move beyond basic workforce education toward career pathways for Spanish-speaking employees and professionals. Juan said the goal is to define the skills, responsibilities, and development needed for advancement into leadership and other professional roles.

  - **Professional Recognition:** Participants noted that many Spanish-speaking workers arrive with technical education, agricultural experience, machinery certifications, or business skills that employers may not discover because employees struggle to express them in English. Employers are encouraged to assess capabilities directly and create opportunities for those skills to be used.

  - **Training The Trainers:** Juan described a model in which professionals who receive advanced credentials can become trainers for the next generation. The council is updating foundational education while adding advanced education so that participants can eventually provide instruction themselves.

  - **Participation Growth:** Alejandra reported increased engagement with Spanish-language programs, including steady or growing Cultivate attendance, higher Spanish webinar registrations, and additional Spanish-

language programming. This was identified as evidence that members are willing to participate when accessible opportunities are provided.

- **Digital Discovery and Artificial Intelligence:** Liz, David, John, Robert, and other participants discussed how consumers increasingly use ChatGPT, Google AI, automation, and digital tools to discover plants and services, creating requirements for better product data as well as opportunities to reduce labor and improve customer expectations.

    - **AI-Based Shopping:** Liz reported that customers increasingly begin plant searches through ChatGPT, Google AI snippets, and other digital tools. Retailers are receiving automated Google calls asking whether specific plants are in stock, as part of an effort to prevent customers from making wasted trips.

    - **Digital Product Data:** Liz encouraged growers, nurseries, and retailers to improve online product information through accurate descriptions, photography, universal identifiers, and current inventory data so search engines and AI tools can return reliable answers.

    - **Operational Automation:** John said automation is beginning to address labor shortages, reduce physical strain for aging team leaders, improve product consistency, and lower costs. Participants also described AI handling routine tasks such as inventory calls, spreadsheet work, and basic production decisions so employees can focus on more complex work.

    - **AI Training:** Juan said Spanish-speaking workers should be trained to operate new technologies rather than being treated as unable to compete with them. The council is considering progressing from basic education to advanced credentials and trainer roles.

    - **Managing AI Expectations:** Andy noted that AI-generated landscape images can create unrealistic expectations by showing mature, fully blooming landscapes immediately. Participants proposed tools with sliders showing installation, one-, two-, and three-year outcomes and seasonal changes, allowing account managers or retailers to use AI while providing more accurate information.

- **Interior Plantscape Value and Market Conditions:** Molly and other participants explained that interior plantscape is a professional horticultural and biophilic service rather than basic plant watering, and described how cost pressures, hybrid work, construction trends, and client education are shaping the segment.

- **Professional Service Positioning:** Molly said interior plantscape companies need to communicate that they provide professional horticultural services and biophilic solutions for commercial spaces, not merely plant watering. The sector is educating architects and designers about integrating plants into environments where people spend much of their time.

- **Cost And Service Value:** Rising labor and operating costs are being passed through to customers, making it necessary to explain the quality and scope of service. Participants said service differentiation is increasingly important because multiple companies may offer similar products, while existing clients are more cautious about upgrades and additional services.

- **Hybrid Work Impact:** Reduced office occupancy and slower commercial construction affected the sector, but the impact has improved from the worst pandemic-era conditions. Loyal clients maintained services, and companies have used the documented benefits of plants to help employers encourage workers to return to offices.

- **Integrated Building Design:** Participants said newer construction increasingly incorporates plants into building structures, conference rooms, and focal areas from the design stage rather than adding them after completion. Green infrastructure is expected to become more prominent as buildings seek stronger employee experiences and environmental outcomes.

- **Retail Demand and Waste Management:** Liz described a post-pandemic retail market in which plant demand remains above pre-2020 levels but waste has increased, requiring better forecasting, timing, and alignment between production and consumer demand.

    - **Post-Pandemic Demand:** Retail experienced a major plant-buying surge during the pandemic as people spent more time at home, but demand has since declined from the exceptional 2020–2021 period. Current revenue may be comparable with later benchmark years, while operating conditions are less favorable.

    - **Waste Reduction:** Liz said retail waste has become a major challenge, with waste levels more than double those seen in 2021–2022. The response is to better understand what consumers will buy, present products when they look their best, and coordinate supply with seasonal demand to reduce end-of-season disposal.

- **Automation And Technology for Growers:** John, Broch, and other participants identified automation, improved planning, and competitive procurement as practical opportunities to help growers manage labor shortages, improve consistency, and offset rising costs, including for smaller operations.
    - **Nursery Automation:** John said automation is improving labor productivity, reducing physical strain, standardizing production outcomes, and lowering costs. It is particularly useful as experienced crew leaders and team leads age, and businesses seek ways to maintain output with fewer available workers.
    - **Small Grower Access:** Broch noted that automation and technology have historically been concentrated among medium and large greenhouse operations, while smaller growers now need access to tools that address the same labor and financial pressures. Training must cover both the technology and the business case for adopting it.
    - **Competitive Procurement:** Broch said disruption from a major industry supplier bankruptcy led growers to put more purchases out for bid instead of automatically using established vendors. The resulting competition has created opportunities to reduce costs and improve product costing and procurement discipline.
    - **Technology Adoption Support:** Participants connected automation adoption with workforce training, noting that employees need clear instruction and reassurance that technology will be a tool they operate rather than a replacement for their contribution.
- **AmericanHort Partnerships and Advocacy:** Participants identified roles for AmericanHort in coordinating industry storytelling, partnering with existing education and trade organizations, supporting advocacy, and helping members respond to consolidation, workforce, technology, and regulatory issues.
    - **Strategic Storytelling:** Participants repeatedly called for clearer communication about the industry's professionalism, economic value, plant benefits, technical careers, and social and environmental contributions. AmericanHort plans to make industry value and storytelling a strategic initiative, potentially including member career stories and examples on its website.
    - **Partnership Model:** The group recommended collaboration rather than duplicating existing efforts, including partnerships with Seed Your Future, NALP, OPEI, botanical-garden organizations, universities, 4-H, FFA, and other

education groups. Existing networks can provide access to students, educators, parents, customers, and policymakers.

- **Political Engagement:** Rachel encouraged members to invite elected officials to tour operations, particularly as new legislators take office. Debbie noted that AmericanHort's advocacy webpage contains resources for hosting officials, and participants said early education can improve policymakers' understanding of day-to-day industry impacts.

- **Member Resources:** Participants suggested that AmericanHort could provide practical frameworks for cooperatives, succession and ownership alternatives, equipment education, workforce development, and small-business mentorship. The meeting was intended to identify priorities for future attention rather than resolve every issue immediately.

Possible Follow Up – for AmericanHort Staff Consideration:

The discussion generated the following ideas for AmericanHort staff to consider. These are suggestions for further evaluation and should not be interpreted as commitments by the association to implement every idea raised.

- **Industry Storytelling:** Develop and launch the planned strategic storytelling initiative that communicates horticulture's professional value, career opportunities, societal benefits, and diverse industry roles.

- **Career Story Resources:** Create a shared AmericanHort website resource where members can contribute personal career stories and descriptions of industry roles for use in outreach.

- **Industry Partnerships:** Coordinate with Seed Your Future, botanical gardens, universities, the American Public Garden Association, FFA, 4-H, and related organizations to expand awareness of horticultural careers among students, educators, and parents.

- **Student Engagement:** Increase participation of university students and young professionals at Cultivate and connect them directly with businesses and exhibitors.

- **FFA Collaboration:** Explore hosting or supporting the National FFA floriculture competition at or near Cultivate and evaluate use of the industry technician certification test.

- **Local Advocacy:** Provide members with resources and coordination for educating local and state officials about the cost, operational, environmental, and customer impacts of equipment and pesticide regulations.

- **Elected Official Outreach:** Continue helping members invite elected officials to tour horticultural operations, using the association's advocacy resources and hosting guidance.

- **Electric Equipment Education:** Collaborate with landscape associations and equipment organizations to provide practical guidance on electric equipment, charging infrastructure, equipment selection, and business-case evaluation.

- **Consolidation Support:** Develop alternatives to private-equity sales for owners approaching succession, including connections to cooperative models, vertical integration, Farm Credit, and other financing resources.

- **Small Business Mentorship:** Expand mentorship and educational support for emerging small businesses, including access to Cultivate and other industry resources.

- **Spanish-Language Career Development:** Advance Spanish-language education from basic training to credentialed and leadership-oriented career pathways, enabling trained professionals to train the next generation.

- **Workforce Development:** Create clearer internal career paths by discussing employees' goals, documenting skills, and providing targeted training and incremental responsibility or compensation steps.