

**“Keys to Future Success in the Green Industry”**

An Address by Robert Dolibois  
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It is a great personal and professional privilege to be addressing you this afternoon as the Fall 2008 Ellison Chair Distinguished Lecturer. I am honored to be here and I stand in the shadow of the invitees who have previously stood at this lectern.

I am a grateful and committed 17-year veteran of service to the industry, to the American Nursery & Landscape Association, and to its research counterpart, the Horticultural Research Institute. In my 35-year career as a professional trade association executive, I have worked in multiple industries. My experience allows me to authoritatively state that this industry--which grows, distributes, retails, designs, installs, and maintains landscape and interior plants--is among the most fortunate of all industries.

Its products and services are eagerly sought by over 80 million U.S. households. The conduct of business in our industry is characterized by remarkable collaboration: First, among the industry businesses themselves, with a degree of harmony that is then reflected in its mostly happy family of trade and professional organizations. It enjoys a supportive and authentic trade press corps that provides a credible communication network among the highly diversified interests in the industry.

The industry is also aided and abetted by a competent and engaged research and extension community. Our land grant universities and the USDA Agricultural Research Service are populated with scientists and other professionals that enjoy friendly and practical relationships with industry stakeholders. This relationship is nurtured by the financial support from industry foundations like the Horticultural Research Institute, the American Floral Endowment and others. These organizations, coupled with the proceeds of the national Floriculture and Nursery Research Initiative and its turf grass counterpart engender millions of dollars of research funding annually.

All this good fortune notwithstanding, life in our industry and your academic pursuits is not without challenges; some portending change that could extensively alter the traditions and systems that we have enjoyed for multiple generations. It is on these challenges—and more importantly, the opportunities they offer—that I would like to focus my remarks this afternoon.

I am framing these remarks around three keys to future success in the green industry:

- 1) Pursuing a changing marketplace
- 2) Embracing sustainability
- 3) Improving industry problem-solving

### **Pursuing a changing marketplace**

My perspective on the changing marketplace is influenced by the ideas espoused by our colleague and friend, Charlie Hall. He has become a bit of an industry oracle on this point—I emphasize the bit part, since he and I are both vertically-challenged. But together, we make up in mental agility what we lack in physical stature. On my part, I make up in ignorance what I lack in advanced education. And with those qualifiers, let me identify some clear movement in three of our market's tectonic plates.

The first is our nation's demographics. Research and common sense both attest that we are entering a period of diminishing numbers in our primary purchasing population cohort, i.e., middle-aged households. For the last 15 years, the industry has ridden on the back of the Boomer behemoth, journeying through its most prosperous years and exercising its prime buying habits of our industry's products and services.

For the next decade or so, the industry is facing fewer people in this prime age group. We are going to need to find ways to extend the Boomer's interest and spending patterns through our offerings. At the same time, we need to explore innovative ways of capturing the interests of the larger cohort of Gen Y'ers at an earlier point in their transition to home buying. In all instances we need to reverse an alarming trend of reducing the proportion of plant material relative to hard-scaping in residential and commercial design.

The movement of a second tectonic plate started several decades ago, but continues to cause major disruption in the industry's marketplace for "woody" plant material. I'm talking about the transition from field-grown to container-grown plants. This shift has already converted the industry from a producer-driven to a buyer-driven marketplace. Containerized plants enable incremental buying and incremental delivery, a system largely unavailable when plants could only be seasonally-harvested.

We are now witnessing the effect of this conversion to incremental buying and delivery: diminishing traditional industry trade shows as a platform for active commerce. This has significant implications for the industry's traditional method of financing its trade and professional associations. These organizations are critical to defending and promoting the industry.

Containerized plants also diminish the affect of major crop loss caused by acute weather crises. The enhanced portability of plant containers reduces episodic regional plant shortages that have historically protected product pricing.

All of which leads to an opportunity to revolutionize our logistics and materials handling processes. The European industry clearly affirms the efficiency gains of standardized systems, both in container sizing and shipping. While the greenhouse sector of our domestic industry has benefitted from their example, the woody side has a long way to go in tapping these more efficient methods and their companion, mechanization.

To review, actively pursuing the changing marketplace provides significant opportunities for our industry:

- 1) To expand the leading and trailing edges of our residential customer base.
- 2) To reconsider how the network of critical trade associations are to be financed in the future and
- 3) To fully and quickly implement the lessons we have already learned about standardization, alternatives for more efficient logistics and, incidentally, the need for more appealing packaging.

### **Embracing sustainability**

The term sustainability is increasingly appearing in our industry's conversations. At this point, it is invoked as both blessing and curse. It is time for us to more fully pursue the concept, define its threats and opportunities, and—in significant measure—declare industry ownership of its implications for us.

The concept and full implications demand more time than this lecture allows. So, let's engage in some shorthand talk.

For our purposes today, the definition of sustainability is borrowed, but authoritative. In its essence, sustainability is “the ability to continue a defined behavior indefinitely.” Sustainable practices therefore “meet the needs of the present without compromising the ability of future generations to meet their own needs.”

Sustainability is not a totally new concept. It was a fundamental principle of best practices for countless generations prior to the industrial revolution. The industrial revolution provided unprecedented opportunity to not just be stewards of Mother Nature's systems, but to potentially exploit her systems for shorter-term gain.

Embracing sustainability does not mean totally reverting back to pre-industrial revolution patterns. Instead, we have the opportunity—and some would say, the moral responsibility—to marry our current industrial systems with the more traditional and enduring systems of stewardship.

In practical terms, embracing sustainability means continuing many of the improved methods and systems that we are using today. It also means altering some of the behaviors that we currently engage in, to bring them in line with the longer-term framework that sustainability implies. Lastly, and perhaps to a lesser degree than some of the skeptics suggest, we need to discontinue some behaviors that clearly have bought us short-term advantage, but are less essential to our current success than we believe.

Further employing shorthand, let me review the fundamental building blocks of sustainability and relate them to our industry. Before I do that, I want to pay homage to William McDonough, noted architect, former dean of the School of Architecture at The University of Virginia, and one of the foremost visionaries articulating the benefits and necessities for grand-scale conversion of industries and economies to sustainable practices.

McDonough was a keynote speaker at the ANLA Management Clinic in the late 1990's. The Clinic is a leading industry education event of some one-thousand horticulture business owners and senior management. McDonough's presentation was the most intriguing I have witnessed in my 17 years of attending that event. The second-most intriguing was his return visit presentation to the ANLA Management Clinic in 2007.

In the intervening years, McDonough became notable for his involvement in the development of the Hannover Principles in Germany in 2002. These principles helped frame the sustainability movement worldwide. More recently, he has authored a book, *Cradle to Cradle*. The words in the book establish a manifesto to the business community to embrace sustainability. The book itself—physically—is a tangible expression of his concepts. If you have not read it, I urge you to do so.

In both of his presentations to the industry at the Management Clinic, he made abundantly clear why our industry should be laying its own claim to sustainability and promoting its concepts to our customers and clients.

Let me paraphrase how and why what he said is so important to us.

Again, in shorthand, the fundamental buildings blocks of sustainability could be labeled

- PLANET
- PEOPLE
- PROFITS

The PLANET block is probably the best known element and is the subject of most of the passion and skepticism expressed about the concept of sustainability.

Perhaps much of the information relating to this building block is known to the audience here today. In review, McDonough speaks pointedly about how natural systems produce waste which, in turn, becomes food for some other living entity. The total elimination of waste through biological metabolism was disrupted when the industrial revolution

instituted, on a massive scale, the production of waste products that don't become food or are not metabolized naturally.

In his recent presentation at the Clinic, McDonough told the poignant story of how his vision for a different approach was conceived. As a child, he did what we all did: he played. And in that playtime he would break something, or complete a scribbling he didn't want to keep. Upon inquiring of his mother what he should do with the broken pieces or that undervalued work of art, his mother told him to "throw it away."

This is exactly what he did. And the next time it happened, his mother again instructed him to "throw it away." Over and over it happened. Until one day, he began to wonder what will happen when "Away" gets filled up...

His thinking evolved to what is now a very compelling concept that encourages that we rethink how we do things, to prevent "away" from getting filled up.

Conventional thinking will typically lead to the assumption that he is talking about the need for more regulations to discourage businesses from producing more stuff to be thrown away—into the air, into the water, or buried in the soil. *Au contraire*.

In his unconventional way, McDonough condemns regulation intended for such purposes. He believes that regulation is a symptom of system design failure. Regulation too often means simply restricting the output of failed design. In essence, the goal of regulation is for businesses to be "less bad." Not good, mind you; but just less bad in producing unnatural waste. Of course, in the long run, such limiting of waste production only postpones the moment at which "away" gets filled up.

In the meantime, regulation can have unintended consequences, such a limiting growth and profitability. McDonough is a strong proponent of growth and profitability. Folks, he is our friend for that very reason. We need to listen to his solution: Re-engineer the process to eliminate waste as best as possible. Excess waste can be a symptom of excess inputs. Disposing of waste can be costly. In other words, his notion of sustainability can actually add to a business' bottom-line.

His thinking undermines the ideology behind more regulation and the theology of restricting growth and prosperity. His is a voice of reason; a Third Way for us to pursue while ignoring the stalemated argument between the unbridled capitalist and the gelded communitarian.

So let us go forth and examine our systems which produce waste. Let's re-engineer, re-use, revert and recycle like we never have before.

The second building block of sustainability is PEOPLE. This element also has its passionate defenders and its skeptics among our industry.

As in the case of the changing marketplace, demographics are once again in the spotlight demanding our acknowledgement and adjustment. The supply of unskilled and semi-skilled laborers available to our industry is rapidly diminishing. The youngest Baby Boomer is now 44-years-old. He's getting a little too creaky to perform the manual labor upon which much of our industry depends.

Not only are there fewer native-borns in the younger adult cohort, but even fewer of them proportionately are willing to perform the tasks that we need performed in order to grow our plants, get them to market and maintain them in the landscape.

ANLA and our allied associations have spent over ten years and well over \$1 million trying to convince federal legislators of the critical need to reform our nation's laws regarding immigration and its guestworker programs geared to meet the demand for seasonal, unskilled labor. Rest assured, we will continue that battle until we win sufficiently to ensure a reliable and legal supply of workers.

But is our system of labor allocation and work systems sustainable, even if we do get legislated relief? Many folks are beginning to believe that while absolutely necessary, functioning immigration and guestworker laws will not—alone—fulfill the People element of sustainable industry businesses.

As with my previously-cited case of logistics and materials-handling opportunities, increased mechanization in multiple sectors of our industry is the best opportunity we have to address our labor challenges, too.

And in that context, let me digress and offer a caution to any of you in the greenhouse sector seeking solace in the notion that the greenhouse sector is already mechanized. That may be truer in the plant production stage, than in the case of your woody producer counterpart.

However, for those greenhouse and nursery growers who think they are in the business of growing plants, I've got news for them. They are NOT in the plant-growing business. They are in the hole-growing business. If they are not growing holes in their plant inventory on a continuous basis, they are out of business. A critical ingredient in the hole-growing business for growers is our current dependency on unskilled labor in our commercial landscape market, and much of the residential market as well.

Our industry today is far more interdependent than many folks in the industry appreciate. The end-user customer does not, I repeat, does not make the distinctions of plant botany, production methods, or annuals-perennials-or-woodies that we make among ourselves. For most of the market, and even more so in the coming generation, this "green stuff" is all the same and it is already intimidating enough in their dummy version OF IT.

The PEOPLE part of sustainability also offers us a chance to rethink how we recruit and retain the skilled and management workforce as well. There is a lot of chatter going on

about the mindset and work attitudes of the “Gen-Y” worker now gaining presence in our workforce. These are the people between the ages of 18 and 30 years-old.

For sure, a good chunk of what is being touted as “different” among Gen-Y workers is not so much fundamental as it is “longitudinal.” By that, I mean that, as these workers spend more time in the workforce and they’re personal lives advance, some of their thinking will change and more likely resemble their older counterparts.

Nevertheless, there are some opportunities for our industry to capture the imagination and even career commitment of these recent graduates. Our businesses remain very relationship-based. Our products and services offer a connection between people and the earth. Much of what we do is highly visual and stimulates the senses. There is tangibility and authenticity to time spent working in our industry. All of these features comport nicely with the instincts closely identified with Generation-Y sensibilities. In short, there isn’t much to apologize for in what we do and why we do what we do. That’s a definite plus, even to recently unemployed finance wizards from the Generation-X cohort.

The third building block of sustainability is PROFITABILITY. This is the trickiest of all, but still offers us some opportunities to rethink what we do.

The first element has already been covered: reducing the costs of producing and eliminating some of the waste we now generate can add to our bottom line. There’s more, however.

There is an emerging economic concept closely aligned with the sustainability movement that offers great promise to our industry. That concept is called “ecosystem services.” While this idea may be familiar to many of you, it is virtually unknown in the broader industry community. As I apply the concept here, ecosystem services identifies the benefits of natural systems that most cost-benefit analyses ignore or take for granted.

Components of the ecosystem actually perform services of *provisioning* (as in food and water production), *regulating* (as in climate and diseases), *supporting* (as in nutrient cycles or pollination), and *preserving* (as in species diversity). Currently, there is little or no consideration of the economic value of these natural and invisible services when applying cost-benefit analyses to proposed residential, commercial and industrial development proposals. The reduction or loss of these natural services must begin to be factored into determining the true cost of further development and industrialization.

For sure, we are all concerned about the costs associated with the loss of ecosystem services. But for our industry’s purposes, I am much more concerned about the virtue of maintaining and expanding the benefits of these ecosystem services. By this I mean there are clear and significant opportunities for our industry to promote the value of the ecosystem services provided by the managed environment. Green roofs. Buffer plantings to filter or absorb water run-off. Strategically planted trees to reduce ambient

temperature or block frigid winds. Using plants to cleanup urban brownfields. And on. And on.

Determining the full economic value of the ecosystem services (and the environmental benefits) of managed landscapes can occupy of the attention of horticulture researchers and industry marketers for the next decade and more. And darned if we might not improve our profitability in the process!

In the early years of the horticulture industry, our energies and focus were largely concentrated on landscaping the estates and parks of major cities and providing the fruit tree and the windbreaks needed in rural America. Full flowering of the GI Bill following WWII and birthing of the Baby Boomers ushered in an era of unprecedented growth in our industry. Suburbia was born. DIY gardening and landscaping replaced the estate gardener. A visionary named Walt Disney somehow came up with the idea of rendering his cartoon characters in brightly colored flowering plants. And it was morning in our industry.

Then in the late '60's and throughout the '70's, the interstate highway system was built and Lady Bird Johnson--a Favorite Daughter of Texas and our industry's patron saint—promoted the idea of landscaping along those highways. The 1980's saw the expansion of office parks, shopping malls, and townhouse developments—all generously landscaped. The commercial landscape maintenance sector was invented to meet the demand.

Now those Boomers, around which much of those expansionist activities were focused are topping out. But we have a new opportunity before us, yet again—"Greening" the last unplanted frontier of the managed landscape: urban America. What do we need to do to clone Chicago Mayor Daley and elect them to leadership of every major city in America? The Windy City model—still to be expanded on home ground—can mean so much opportunity for our industry. That opportunity in the next decade or so can tide us over while we wait for the Echo Baby Boom generation now unfolding to reach maturity and grow our residential market yet again.

One very promising development in this effort to "green" the cities is unfolding only two hours from College Station, in nearby Austin. The Lady Bird Johnson Wildflower Center, in collaboration with the American Society of Landscape Architects and the U.S. Botanical Garden, is heading a project called the Sustainable Sites Initiative (SSI). This project is developing a set of guidelines and rating criteria for landscaping that parallels the successful LEED program of the U.S. Green Building Council.

While the LEED program has some criteria for landscaping surrounding a facility built to its "green building" standards, they are admittedly inadequate. There are early indications that the U.S. Green Building Council would be interested in assimilating the SSI criteria and ratings components into a future revision of its LEED green building certification program. If that happens, the implications for our industry are significant indeed.

An often-heard lament in our industry is that landscaping is an after-thought to too many commercial and residential developers. Instead of being included in the initial design and budgeting, landscaping is delayed or reduced in response to cost and time overruns. Construction techniques exacerbate already problematic sites. Wouldn't it be wonderful—the thinking goes—if quality landscaping were “mandatory” in the development process and our industry professionals were included in the deliberations at the beginning of the development process?

Well, that dream can become a reality. If this Sustainable Sites Initiative proves successful, developers and builders seeking LEED certification for their projects will be forced to include quality landscaping in their plans and construction. Landscape professionals will have a seat at the table and the budgets will be reworked to accommodate implementation of that landscape plan, or the buildings would fail to be certified.

There is a companion effort unfolding that compliments the opportunities emerging from the definition of ecosystem services and the design of LEED-type criteria for landscaping. That effort is being spearheaded by an entrepreneurial venture in Raleigh, North Carolina that ANLA endorses and has collaborated with for four years. Eighteen months ago, a third player surfaced in the form of an insurance broker in New York City.

The upshot is a fledgling, but very promising endeavor to monetize the value of landscaping. If successful, this project can have major, long-term effect on the scale and levels of investment in commercial, residential and municipal landscaping.

The Raleigh-based firm, Horticultural Asset Management Inc. has built—for the first-time ever—a comprehensive data base of wholesale pricing of multiple sizes of hundreds of varieties of landscape plants. This data base now involves over two hundred growers nationwide providing pricing. This company can therefore quote the catalogue value of 750,000 varieties and sizes of plants.

The insurance broker in New York has been working with an insurance company and related underwriters who have accepted the validity of these plant prices. The result is a first-ever capacity to fully insure the replacement value of landscape plants, both in the production stages as crop insurance, and in the installed landscape as a rider on a homeowners policy.

The private-sector crop insurance program can be secured for greenhouse, field-grown, and container-grown plant material. It can be customized in terms of deductibles and the crops chosen to be insured against acute weather incidents, fire and building collapse.

In the installed landscape formulation, this insurance coverage provides for increasing coverage based on the increasing value of landscape plants over time. This is significant because it confirms the long-held claim that landscaping is the only component of the urban and residential infrastructure that increases in value over time.

The homeowner only buys that expensive Wolf cooktop for the trophy kitchen and in three years' time it is an obsolete model and has lost value. The homeowner only buys that expensive shower system for the trophy bathroom. In three years' time, several of the two-hundred water jets are clogged and the shower system has lost value. On the other hand, in that same three-year period, a landscape in which the homeowner invests is worth more than when it was brand new. And in six years, that investment continues to grow, while the homeowner goes to buy a newer model cooktop or shower system.

Once this concept of monetizing the value of landscaping gains credibility and landscaping is defined as an investment in an increasing asset, the implications for our industry grow increasingly favorable.

Where? For starters, in the marketplace where upgrading landscaping finds favor and home builders can insure up-sell landscape packages to new homeowners. Where else? How about municipal governments and water purveyors who have to justify why draconian water restrictions on landscaping are a wise move. With the landscape monetized we can make the case that overly restrictive watering requirements lead to plant stress and failure affecting millions of dollars of investment in private and public landscapes? Besides, if you can't water it now, you can't hug it later.

Perhaps I am a hopeless optimist when I tell you that I believe that embracing sustainability can be the most significant and favorable development this industry has seen since the GI Bill, highway beautification and the concept of the office park. Such an embrace is not without risk.

For example, a full embrace means joining forces with some environmental advocates that we have regarded as adversaries in the past. These folks have seen some things coming that we have not had the time or the energy to focus upon. Some of the proposals to advance sustainability will require increased use of native plants. The Sustainable Sites Initiative criteria are certain to include credits for the appropriate use of native plants.

To some, even many, in the industry this will be viewed as a downside. To them, I would offer an alternative interpretation: if the SSI is adopted as part of the LEED criteria for Green Building certification, and 20% of all buildings are built to these criteria, then this constitutes an increasing, predictable and consistent market for native plant material. This translates into a viable commercial opportunity for growers who want to work in this market. It seems far better that we cooperate and promote that market, resulting in raising legitimate demand for the best native plants. The alternative is to ignore or fight the development, end up with regulation of what we can grow and no industry-induced demand for the best native plants by our customers.

Beyond pursuing a changing marketplace and embracing sustaining, there is a third key to the future success of the green industry:

## Enhancing Our Problem-Solving

Part of my professional life includes spending time with fellow association executives who lead trade associations in other industries. Those industries range from energy producers, to healthcare, to construction and even snack foods and bottled water. Following our discussions about the respective industries we serve, I invariably conclude that our green industry is uniquely blessed. That conclusion accounts in part for why I am still here after 17 years, rather than conforming to the average tenure of 5-7 years for CEOs in my field of work.

As I stated earlier, this industry has a lot going for it: congeniality and appealing products. Along with that is a white-hat reputation in the eyes of the public and most government decision-makers. We've also been fortunate to ride the wave of market-building forces beyond our industry, such as the decades-long booms in home-building, road construction and commercial development. And there are plenty of examples in all that where we have made our own good luck happen.

But we mustn't let all this good fortune make us complacent. There are big things coming that could present us with unparalleled problems and we need to beef up our industry's problem-solving capacities before the full spectrum of those potential problems becomes more reality than we can handle.

Among the potential problems are the following:

- Increased regulation
- Financing industry research and development

Regardless of who wins the Presidential election next month, there is bound to be an increase in the amount of regulations that will affect our industry's businesses. Now, there are plenty of legitimate examples of the failure of government to engage in the kind of preventative regulatory measures that is an acceptable and even necessary role of government. I would make a distinction between preventative regulation and the kind of curative regulation that Bill McDonough refers to in his premises about sustainability.

While there are some people who disparage any kind of intervention by government in the conduct of business, most of us—whether liberal or conservative—can agree that reasonable measures controlling the scope and influence of the bad actors, invariably found in every industry, are good for the good guys in the industry and for their customers.

That said, behind every well-intentioned law or regulation, lurk some unintended consequences. The probability of those unintended consequences is directly proportional to the amount of double-mindedness present in the crafting of the original law, as well as the incompetency of the civil servants tasked with implementing lousy law in the form of dysfunctional regulation.

A glaring example of what I am referring to is the current state of the nation's immigration laws. We have other troubling examples as grand as oversight of our financial markets and as mundane as getting through the security lines at any of the nation's airports.

But we are entering a cycle of re-regulation. And there is much about the way our industry does things that are fodder for the ruminating government authorities. We simply must be prepared to make good arguments on our behalf based on reliable facts and quality research. There was a time when claiming sizable business losses was a good defense against regulation. Those times are long gone. Our defense must now be built on hard data and communicated by industry business owners in their terms with authentic examples...repeatedly.

Such defense will require much more research and understanding than we currently enjoy. Added to this regulatory demand is globalization and the importing of plant pests and diseases.

This audience knows better than I do, what challenges face us all in securing the financing for the additional research, so necessary. It has been good to have the extensive, long-term federal and state underwriting of our industry's research and development. Despite all the good such third-party funding has provided over the years, it has come with a hidden risk: our industry's products are not priced to include the necessary expenses associated with privately-funded research and development. This lack of an R&D funding infrastructure is exacerbated in a cottage industry like ours. We do not have Eli Lilly's or 3-M companies to keep the little guys afloat by underwriting industry research. With government funding shrinking and agriculture's political base reduced to 2% of the population, we need to figure out how to stretch finite funding farther and engender new sources of financing industry research.

One approach to enhanced financing is the Floriculture Nursery Research Initiative. This initiative now brings in over \$6 million annually in research funding shared between the USDA Agricultural Research Service and land grant universities. This initiative is a product of industry-wide collaboration led by ANLA and the Society of American Florists. Our goal is \$20 million in annual funding. With budget pressures looming ever greater in Washington, it will likely be awhile before our goal is reached, but we're working on it.

A second approach is showing some promise. Several years ago, the Horticultural Research Institute became aware of an opportunity to advance research on using the keratin from poultry feathers to replace the plastic in plant pots. That project was launched with the help of sizable industry contributions designated specifically for funding the project. Not in an endowed fund, but through direct funding. That approach identified a specific need and sought out the key players in the industry who would most benefit from the problem of plastic pots being solved.

Another approach gaining attention is collaborative research among multiple universities on a single research objective. While this is hardly a new approach, it has great appeal among the decision-makers in HRI, for instance. With rising costs for research and finite research dollars, HRI is increasingly attracted to funding collaborative research involving multiple institutions. In doing so, it is their hope that this approach ensures that HRI is spending no more than 100-cent dollars in underwriting research to find solutions to industry problems.

ANLA and HRI are seeking ways to innovate in our fund-raising and funding methods to enhance the industry's capacity for problem-solving. We welcome your ideas and suggestions, because increasing our problem-solving capacity is a third and very important key to the future success of the green industry.

### **Summary**

In summary then, I see at least three keys to our industry's future success. These endeavors are achievable, provided we build on the strong foundation of collaboration that has brought this remarkable industry to its current level of success.

I applaud Texas A&M and the generous donors who have underwritten establishment of the Ellison Chair. Their vision, beginning with Jim and Ellen, and supported by countless others produces opportunities like this one today.

I hope I have stirred some thinking on your part about the future of the nursery and greenhouse industry—how the marketplace needs to be pursued in new ways. How embracing sustainability can open new and exciting opportunities for our industry to grow and prosper. And finally, the necessity for us to build our capacity to solve industry problems while they are still solvable.

Together we can nurture these keys to our future success. Our failure to do so will mean lost opportunities, diminished resources and the need to relearn lessons we already know. There is no education in the second kick of a mule.

Thank you for your attention today.



