

OREGON CHRISTMAS TREE SURVEY - 2003

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Survey highlights: Oregon's value of Christmas tree production reached \$113.6 million for 2003; growers shipped 6.7 million trees to consumers across the US; the industry employed 9,585 full and part-time workers, and paid wages of \$29.2 million dollars to them. Oregon is the number one producer of Christmas Trees in the US and grows close to 50 percent of the total trees in the Nation. Oregon trees are shipped all over the US and the world. California receives 46 percent of the trees, while 8 percent of the trees are shipped south of the border to Mexico. Eleven percent of the trees are sold within Oregon. The average price received by growers for the trees was \$17.06 per tree, compared to the 2001 value of \$16.06 per tree. Growers with more than 100 acres of trees accounted for 81 percent of the value of production.



The two most popular trees grown are Douglas Fir, which accounts for 55 percent of the market, and Noble Fir, which accounts for 36 percent of all trees grown. Oregon has 61,106 acres growing Christmas Trees and the major counties of production are Clackamas, Marion, and Benton with 17,700, 12,500 and 11,500 acres, respectively, which represents 68 percent of the tree acres in the State.

Planting of trees for future production shows that in the upcoming 3 to 4 years, the number of trees that will be available for harvest will exceed the present sales level, at 6.7 million trees, by 3 to 4 million trees each year. This points to the increasing importance of market analysis, promotion, and sales efforts in the future to expand the Christmas tree market.

Table 1: 2003 Oregon Christmas tree production, sales, workers, wages, and average price per tree

	TOTAL	Size of Operation				
		1-14 Acres	15-29 Acres	30-49 Acres	50-99 Acres	100+ Acres
Sales Value (000) – 2001	98,243	6,800	2,853	4,139	5,170	79,281
Sales Value (000) – 2003	113,555	5,016	4,416	5,312	7,258	91,553
Number of Trees Sold (000) – 2001	6,119	532	232	273	372	4,710
Number of Trees Sold (000) – 2003	6,656	328	295	365	437	5,231
Average Price per Tree (\$) – 2001	16.06	12.78	12.30	15.16	13.90	16.83
Average Price per Tree (\$) – 2003	17.06	15.29	14.97	14.55	16.61	17.50
Acres Growing Trees – 2001	50,970	6,344	2,412	2,948	3,439	35,827
Acres Growing Trees – 2003	61,106	5,745	3,776	3,884	4,476	43,225
Number Workers – 2001	9,166	2,520	655	704	892	4,395
Number Workers – 2003	9,585	1,725	863	884	796	5,317
Wages \$ (000) – 2001	24,590	1,896	655	1,096	1,890	19,053
Wages \$ (000) – 2003	29,210	794	815	997	1,953	24,651
Number of Operations - 2003	1,450	970	200	110	75	95

Table 2: Trees sold by species, value of sales, average price and sales by size of operation

Specie	Number of trees sold	Total Sales	Average Price	Sales by acres in operation				
				1-14	15-29	30-49	50-99	100 & over
				<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>
	<i>Number (000)</i>	<i>Dollars (000)</i>	<i>Dollars per tree</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>
Douglas Fir – 2001	3,465	42,804	12.35	2,274	1,184	1,527	2,263	35,556
Douglas Fir – 2003	3,693	44,631	12.08	1,825	1,360	2,099	2,246	37,101
Noble Fir – 2001	2,165	48,219	22.27	3,486	1,226	2,142	2,606	38,759
Noble Fir – 2003	2,405	58,879	24.48	2,175	2,306	2,695	4,457	47,246
Grand Fir – 2001	393	5,777	14.70	917	400	375	261	3,824
Grand Fir – 2003	415	7,329	17.66	684	605	440	440	5,160
Nordmann Fir – 2001	9	217	24.11	1	17	54	32	113
Nordmann Fir – 2003	28	637	22.75	180	61	51	85	260
Scotch Pine – 2001	31	205	6.61	29	4	22	6	144
Scotch Pine – 2003	45	422	9.38	43	18	13	2	346
Other species – 2001	56	1,021	18.23	93	22	19	2	885
Other species – 2003	70	1,657	23.67	109	66	14	28	1,440
Total – 2001	6,119	98,243	16.06	6,800	2,853	4,139	5,170	79,281
Total – 2003	6,656	113,555	17.06	5,016	4,416	5,312	7,258	91,553

Table 3: Acres, sales, trees sold, and average price per tree sold by county

County	Growers Surveyed ^{1/}	Acres in Operations	Number of trees sold 2001	Number of trees sold 2003	Total Sales 2001	Total Sales 2003	Average price per tree 2003
		<i>Acres</i>	<i>(000)</i>	<i>(000)</i>	<i>(000) Dollars</i>	<i>(000) Dollars</i>	<i>Dollars</i>
Benton	43	11,500	1,273	1,446	21,656	25,671	17.75
Clackamas	265	17,700	2,201	2,438	32,360	39,008	16.00
Douglas	33	2,000	73	91	1,254	1,389	15.26
Lane	70	2,600	206	165	3,270	2,660	16.12
Linn	21	1,300	98	66	1,625	1,213	18.38
Marion	128	12,500	1,155	1,493	17,408	26,234	17.57
Multnomah	13	400	42	29	690	556	19.17
Polk	44	6,100	654	496	13,727	9,672	19.50
Washington	91	2,600	136	176	2,044	3,348	19.02
Yamhill	40	2,800	71	161	984	2,294	14.25
Other counties	44	1,606	170	95	2,501	1,510	15.89
Total	792	61,106	6,119	6,656	98,243	113,555	17.06

1/ This is the number of Christmas tree growers who were contacted for information; there were growers not contacted.

Table 4: Percent of Christmas trees sold by destination and species

Destination	Douglas Fir	Noble Fir	Grand Fir	Nordmann Fir	Scotch Pine	Other Species	All Species
	<i>Percent</i>						
Oregon – 2001	6	9	15	15	11	14	8
Oregon – 2003	10	9	22	25	10	16	11
Washington – 2001	1	4	4	3	4	6	3
Washington – 2003	2	4	11	1	1	2	3
California – 2001	40	56	46	59	46	51	46
California – 2003	40	57	50	43	21	52	46
Other Western 1/ – 2001	11	13	21	18	–	7	13
Other Western 1/ – 2003	16	12	8	19	--	8	14
Midwest 2/ – 2001	2	3	2	1	13	2	2
Midwest 2/ – 2003	1	1	--	--	--	1	1
Gulf States 3/ – 2001	12	8	7	4	2	12	10
Gulf States 3/ – 2003	13	9	5	1	65	4	12
Atlantic States 4/ – 2001	8	1	2	–	12	–	5
Atlantic States 4/ – 2003	2	2	1	--	2	--	2
Northeast States 5/ – 2001	3	1	1	–	5	–	2
Northeast States 5/ – 2003	1	1	--	9	--	--	1
Canada 6/ – 2001	2	2	1	–	7	–	2
Canada 6/ – 2003	2	2	3	--	--	17	2
Mexico – 2001	15	2	–	–	–	8	9
Mexico – 2003	13	2	--	2	1	--	8
All other – 2001	–	1	1	–	–	–	--
All other – 2003	--	1	--	--	--	--	--

1/ Other Western States: MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI. 2/ Upper Midwest: SD, NE, KS, NM, IA, MO, WI, IL, MI, IN, OH, KY.

3/ Gulf States: OK, TX, AR, LA, TN, MS, AL. 4/ Atlantic States: MD, DE, WV, VA, NC, SC, GA, FL. 5/ Northeast States: ME, NH, VT, MA, CT, RI, NY, PA, NJ.

6/ Canada: All provinces.

Table 5: Number of trees planted by species and year planted

Species	1997 & earlier	1998	1999	2000	2001	2002	2003	2004 ^{1/}
	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>
Douglas Fir	4,710	3,196	3,624	3,865	3,522	3,781	3,412	3,135
Noble Fir	3,947	3,319	3,710	4,649	5,951	5,510	5,257	5,250
Grand Fir	584	458	494	719	706	779	811	784
Nordmann Fir	53	43	75	176	194	243	390	421
Scotch Pine	93	145	55	62	39	53	29	21
Other species	86	133	130	148	80	100	76	78
Total	9,473	7,294	8,088	9,619	10,492	10,466	9,975	9,689

1/ Planted or to be planted.

Table 6: Oregon Christmas tree workers and wages by size of operation

Workers & Wages	1-14 Acres	15-29 Acres	30-49 Acres	50-99 Acres	100 & over Acres	Total
Full-time workers - number – 2001	11	28	8	41	594	682
Full-time workers - number – 2003	15	24	6	50	673	768
Seasonal workers - number – 2001	2,509	627	696	851	3,801	8,484
Seasonal workers - number – 2003	1,710	839	878	746	4,644	8,817
Total workers - number – 2001	2,520	655	704	892	4,395	9,166
Total workers - number – 2003	1,725	863	884	796	5,317	9,585
Total wages - \$ (000) – 2001	1,896	655	1,096	1,890	19,053	24,590
Total wages - \$ (000) – 2003	794	815	997	1,953	24,651	29,210
Annual average wage/worker dollars – 2001	752	1,000	1,557	2,119	4,335	2,683
Annual average wage/worker dollars – 2003	460	944	1,128	2,454	4,636	3,047

(Continued from front)

About this Survey: The **2003 Oregon Christmas Tree Survey**, conducted in the summer of 2004, was the second effort to collect accurate and detailed information for the Christmas tree industry, which traditionally has been the 6th largest agricultural commodity grown in Oregon in terms of the total value of sales. The industry feels that a biennial survey of growers provides information that is critical for making informed decisions about important issues facing Christmas tree growers, like planning future sales and marketing efforts. Plans are best made based on facts and figures, rather than on speculation and pure opinion. Funding for the survey was provided by licensing fee monies from the Oregon Department of Agriculture (ODA). The mailing list originated from ODA's list of licensed Christmas Tree Growers, plus names and addresses taken from our comprehensive list of agricultural producers. The questionnaire content and design process began in January 2004 through discussions with the ODA Christmas Tree Advisory Committee and the Pacific Northwest Christmas Tree Association. The questionnaires were mailed to growers in June 2004, followed by another mailing in July. During August, additional contacts were made of nonrespondents by field interviewers. We thank the growers for their great cooperation, as over 92 percent of them participated in the survey. We look forward to working with the industry on the next Christmas Tree Survey to be conducted in 2006.

History: There are a several other sales figures available on the Christmas tree industry in Oregon. Currently, Oregon State University is estimating the 2003 value of sales at \$158 million, which is based upon information provided by Oregon's County Extension Agents. For 2002, the Census of Agriculture reported Oregon growing 67,804 acres of Christmas trees, with sales of 6.5 million trees for that year. The results of the National Agricultural Statistics Service's 2003 Nursery Crops Survey (growers with \$100,000+ sales, conducted in 17 States), released in July 2004, reported 4.7 million trees sold in 2003, with a gross sales value of \$82.2 million. Accurate enumeration of the Christmas tree industry in Oregon remains challenging, due to the difficulty of developing a "complete" Christmas tree grower mailing list because of the significant number of small growers who may not be licensed or show up on any available lists. In addition, there are many operator and landlord growing agreements which can make it difficult to ensure that the same production is only counted "once" in the survey.

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 PNW Christmas Tree Association
 OAN Christmas Tree Chapter
 Oregon Christmas Tree Growers