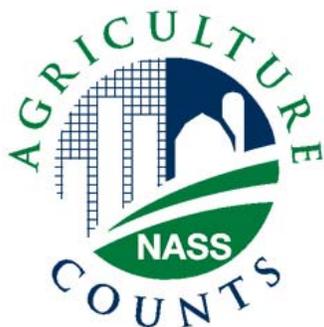
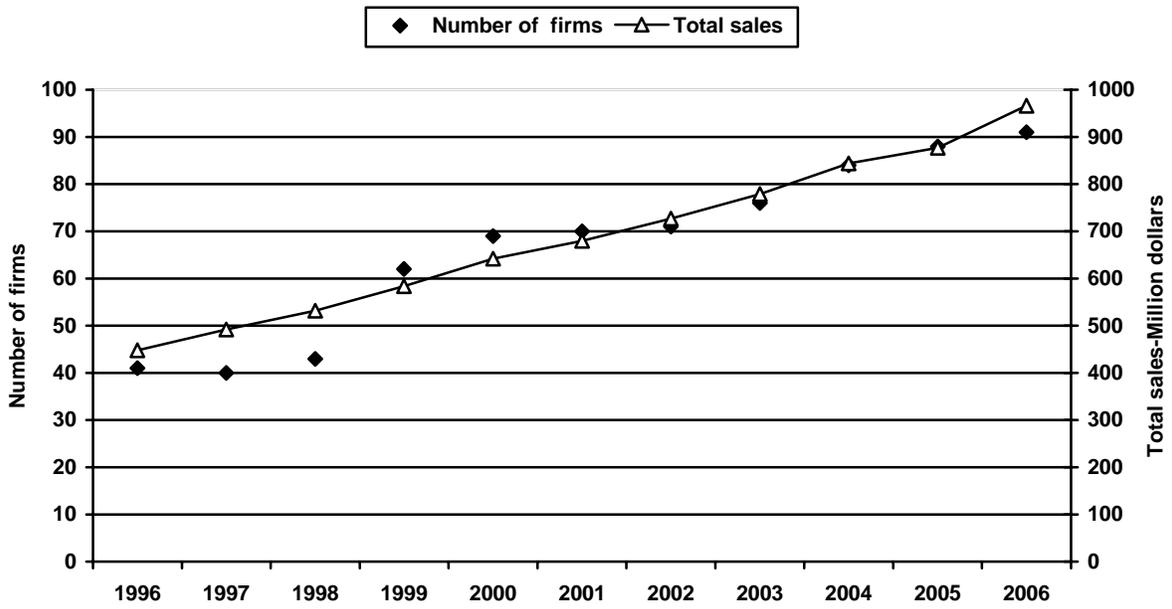


# **Oregon Nursery and Greenhouse Survey 2006**

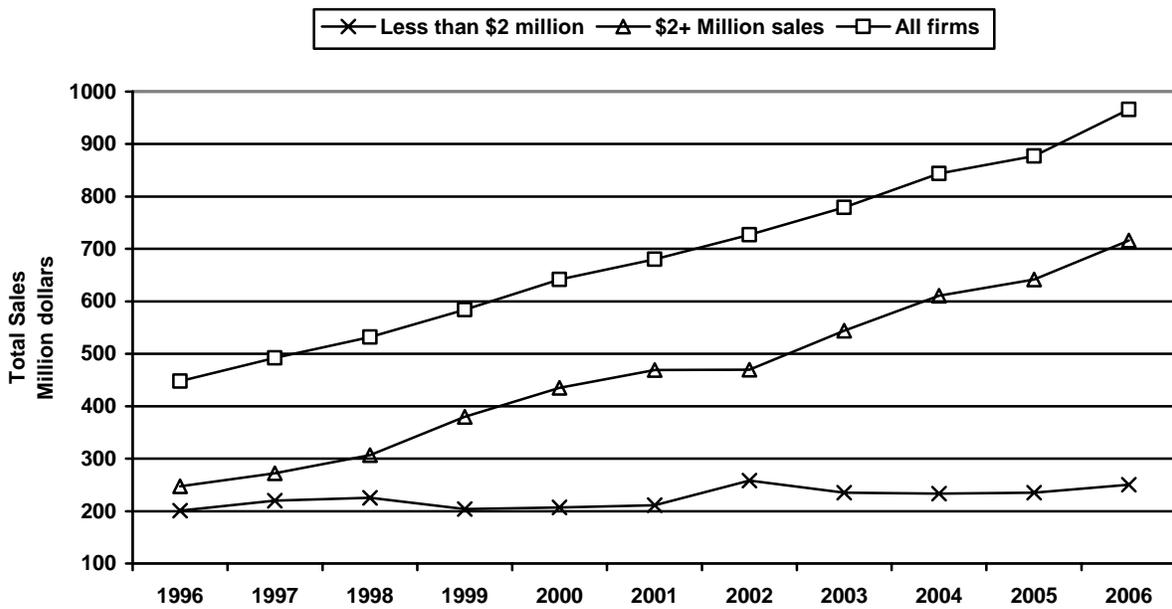


**USDA-NASS Oregon Field Office**

Number of firms with \$2+ million in sales,  
and total sales, Oregon, 1996-2006



Gross sales of firms with above and below \$2 million in sales,  
and total sales, Oregon, 1996-2006



**2006**

# **Oregon Nursery and Greenhouse Survey**

Compiled and Published by

**Oregon Field Office**

**National Agricultural Statistics Service**

**United States Department of Agriculture**

**Christopher A. Mertz, *Director***

**Bruce A. Eklund, *Deputy Director***

**Kent Hoddick, *Agricultural Statistician***

**Chuck Bennett, *Statistical Assistant***

**Eric Stebbins, *Agricultural Statistician***

**Mali Viste, *Office Automation Assistant***

Copies of this publication are available at no charge by contacting the Oregon office at 1200 SW Third Ave., Room 1735, Portland, OR 97204-2899, (503) 326-2131, by sending a request via E-mail to: [nass-or@nass.usda.gov](mailto:nass-or@nass.usda.gov), or by accessing the Internet at [www.nass.usda.gov/or](http://www.nass.usda.gov/or).

---

## FOREWARD

September 2007

It is a privilege for me to present the results of the *2006 Oregon Nursery and Greenhouse Survey*. We would like to thank the many Oregon nurseries and greenhouses, the Oregon Association of Nurseries, the Oregon Department of Agriculture, our crew of field interviewers, as well as others who provide information and support for this important annual effort. The results represent the seventeenth year of documenting through statistics the progress of Oregon's # 1 agricultural industry.

Nursery and greenhouse sales climbed to \$966 million in 2006, up 10 percent from the previous year, demonstrating that the industry continues to do an outstanding job of growing and marketing high quality nursery stock and materials. This growth continues despite the many challenges of labor availability, rising fuel, transportation, and labor costs, sometimes burdensome regulations, and competition for land. The industry is a key generator of revenue for the State, with in excess of 75 percent or \$730 million of sales coming from outside Oregon.

Oregon's top five producing counties Marion, Washington, Clackamas, Yamhill, and Multnomah are in or near the Portland metropolitan area. The nurseries and greenhouses in these five counties represent 86 percent of the total value of production, providing local employment and beautifying the urbanized landscape.

Container sales continue to dominate the product categories, accounting for 44 percent of the sales for all product types; this share is up 12 percent from 2004.

Also this year, the National Agricultural Statistics Service will release the results of the 2006 Nursery Production Survey, conducted in 17 States. This data collection effort is conducted every three years and will allow data users the opportunity to see how Oregon ranks among the other major nursery production states. In 2003, Oregon lead in many categories and with the large growth seen in this State, one would expect Oregon to have an increased role in the national picture.

For additional information on horticultural survey results, see the links referenced on the last page of this report. Access to accurate and timely information is critical to the continued success of this vital sector of Oregon agriculture.

Sincerely,



Christopher A. Mertz  
Director

## TABLE OF CONTENTS

|  |                    |
|--|--------------------|
| Charts – Gross Sales 1996-2006 versus number of firms with sales over \$2 million..... | Inside front cover |
| Gross Sales 1996-2006 firms that make above and below \$2 million.....                 | Inside front cover |

|  | <b>Page</b> |
|--|-------------|
| 2006 Summary.....  | 1           |
| Gross sales by plant material 2000-2006.....   | 1           |
| Gross sales by sales value 2002-2006.....  | 1           |
| Number of operations, acreage and gross sales by county 2004-2006.....                                     | 2           |
| Acreage by plant material 1997-2005.....   | 3           |
| Summary by size groups 2005-2006.....  | 3           |
| Number of workers and gross wages by sales value 2005.....   | 4           |
| Number of workers, wages and number of operations 1995-2005.....   | 4           |
| Destination of Oregon sales by plant material for 1995-2003.....   | 5           |
| Data collection procedures.....  | 6           |
| Number of operations by sales size group 2000-2006.....  | 6           |
| Gross Sales, yearly percent change, number of operations, number of firms with sales over \$2 million..... | 6           |
| Sample Questionnaire – 2006.....   | 7-8         |
| Additional references to recent Oregon horticulture data .....   | 9           |

## 2006 Oregon nursery product sales set another record, almost 1 billion in sales.

Oregon's horticulture industries continued to grow in 2006 with another record high sales value of \$966 million for nursery and greenhouse products. This was the seventeenth year of this survey and the sixteenth consecutive year of record sales. Sales in 2006 increased 10 percent above 2005 and were over 3 times the sales of 1990, the first year of the survey. The horticulture industry continued to solidify its place above all other Oregon agricultural commodities, claiming nearly 21 percent of the total value of agricultural production. Cattle, with a value of \$490 million, ranked second. Grass seeds and all hay claimed third and fourth places with sales of \$481.6 million and \$411.8 million, respectively.

(continued on page 3)

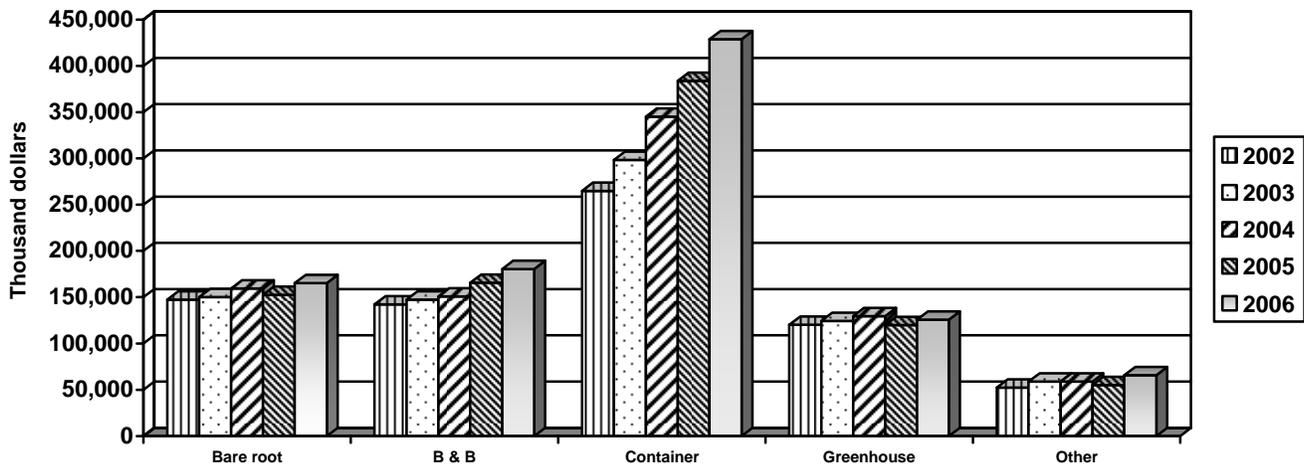
### Nursery and greenhouse: Gross sales, by plant material, Oregon, 2000-2006

| Plant material | 2000                 | 2001                 | 2002                 | 2003                 | 2004                 | 2005                 | 2006                 | 2006/2005      |
|----------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------|
|                | <i>1,000 dollars</i> | <i>Percent</i> |
| Bare root      | 136,700              | 145,100              | 147,500              | 150,100              | 159,400              | 152,700              | 165,200              | 108            |
| B & B          | 127,700              | 129,100              | 142,100              | 147,400              | 151,000              | 165,600              | 180,500              | 109            |
| Container      | 226,300              | 243,100              | 265,100              | 298,300              | 345,300              | 384,000              | 429,000              | 112            |
| Greenhouse     | 106,600              | 114,700              | 120,100              | 124,300              | 129,400              | 119,700              | 125,700              | 105            |
| Other          | 44,700               | 48,000               | 52,200               | 58,900               | 58,900               | 55,000               | 65,600               | 119            |
| <b>Total</b>   | <b>642,000</b>       | <b>680,000</b>       | <b>727,000</b>       | <b>779,000</b>       | <b>844,000</b>       | <b>877,000</b>       | <b>966,000</b>       | <b>110</b>     |

### Nursery and greenhouse: Gross sales by sales size group, Oregon, 2002-2006

| Sales size group      | Gross sales          |                      |                      |                      |                      | 2006/2005      |
|-----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------|
|                       | 2002                 | 2003                 | 2004                 | 2005                 | 2006                 |                |
|                       | <i>1,000 dollars</i> | <i>Percent</i> |
| Less than \$20,000    | 6,100                | 6,400                | 7,700                | 5,900                | 6,100                | 103            |
| \$20,000-\$99,999     | 18,000               | 18,100               | 18,900               | 21,600               | 21,000               | 97             |
| \$100,000-\$199,999   | 15,300               | 15,900               | 16,700               | 13,200               | 11,800               | 89             |
| \$200,000-\$499,999   | 41,600               | 45,200               | 45,100               | 43,500               | 44,600               | 103            |
| \$500,000-\$1,999,999 | 149,500              | 149,400              | 144,300              | 150,900              | 167,000              | 111            |
| More than \$2,000,000 | 469,500              | 544,000              | 611,300              | 641,900              | 715,500              | 111            |
| <b>Total</b>          | <b>727,000</b>       | <b>779,000</b>       | <b>844,000</b>       | <b>877,000</b>       | <b>966,000</b>       | <b>110</b>     |

### Nursery and greenhouse: Gross sales by plant material, Oregon, 2002-2006



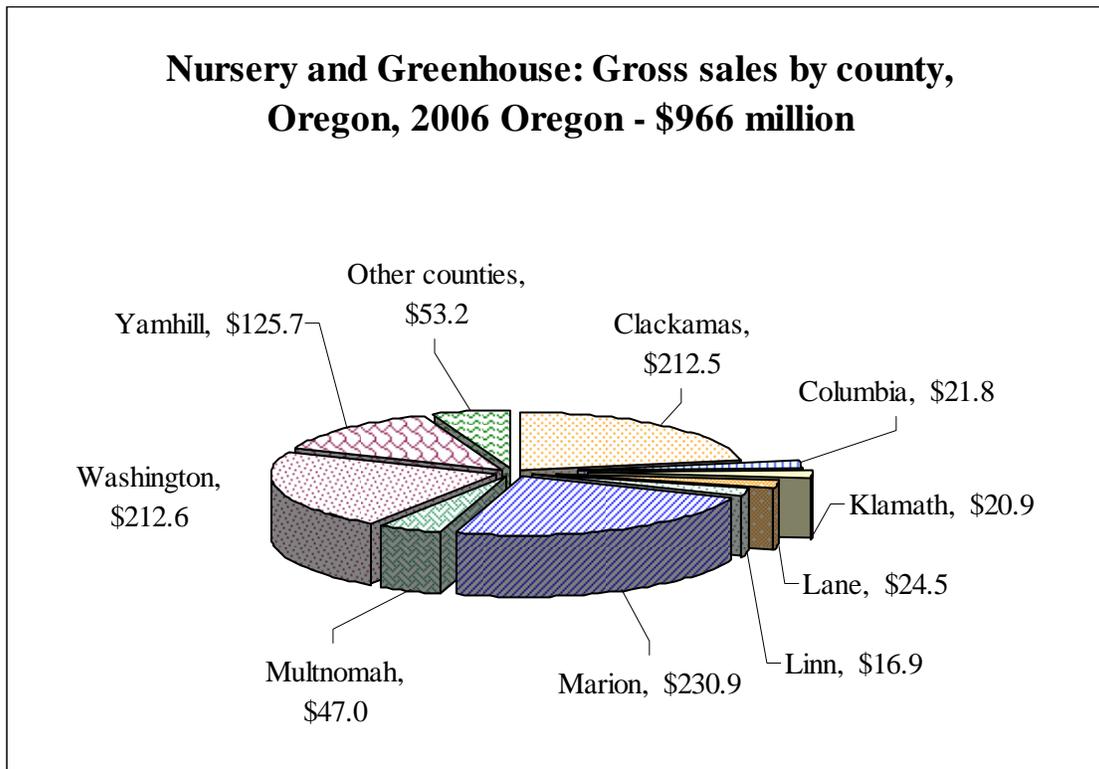
## Nursery and greenhouse: Operations, acreage, and gross sales, by county, Oregon, 2004-2006

| County                         | Number of operations | Acres             | Gross sales          |                      |                      |                |
|--------------------------------|----------------------|-------------------|----------------------|----------------------|----------------------|----------------|
|                                | 2006                 | 2005 <sup>3</sup> | 2004                 | 2005                 | 2006                 | 2006 / 2005    |
|                                | <i>Operations</i>    | <i>Acres</i>      | <i>1,000 dollars</i> | <i>1,000 dollars</i> | <i>1,000 dollars</i> | <i>Percent</i> |
| Benton                         | 43                   | 330               | 1,800                | 1,800                | 1,800                | 100            |
| Clackamas                      | 471                  | 13,500            | 193,500              | 206,500              | 212,500              | 103            |
| Columbia                       | 24                   | 600               | 17,500               | 19,900               | 21,800               | 110            |
| Curry                          | 20                   | 380               | 4,250                | 3,700                | 4,200                | 114            |
| Deschutes                      | 42                   | 310               | 3,600                | 3,800                | 4,600                | 121            |
| Douglas                        | 46                   | 580               | 3,750                | 3,900                | 3,900                | 100            |
| Jackson                        | 71                   | 130               | 3,150                | 3,300                | 3,700                | 112            |
| Josephine                      | 45                   | 130               | 2,500                | 2,800                | 2,800                | 100            |
| Klamath                        | 16                   | 1,760             | 14,100               | 17,500               | 20,900               | 119            |
| Lane                           | 140                  | 680               | 24,000               | 24,500               | 24,500               | 100            |
| Lincoln                        | 26                   | 130               | 2,700                | 2,400                | 2,700                | 113            |
| Linn                           | 75                   | 780               | 14,800               | 15,300               | 16,900               | 110            |
| Marion                         | 356                  | 13,160            | 178,900              | 194,800              | 230,900              | 119            |
| Multnomah                      | 175                  | 3,550             | 49,000               | 46,600               | 47,000               | 101            |
| Polk                           | 51                   | 1,250             | 10,300               | 9,700                | 9,700                | 100            |
| Umatilla                       | 18                   | 720               | 6,800                | 8,000                | 9,600                | 120            |
| Washington                     | 251                  | 7,410             | 191,200              | 193,300              | 212,600              | 110            |
| Yamhill                        | 102                  | 6,100             | 115,900              | 110,100              | 125,700              | 114            |
| Other counties <sup>1</sup>    | 127                  | 300               | 6,250                | 9,100                | 10,200               | 112            |
| <b>Oregon</b>                  | <b>2,100</b>         | <b>51,800</b>     | <b>844,000</b>       | <b>877,000</b>       | <b>966,000</b>       | <b>110</b>     |
| Top five counties <sup>2</sup> | 1,355                | 43,720            | 728,500              | 751,300              | 828,700              | 110            |

<sup>1</sup> Contains counties with less than one million dollars of sales and counties that were combined to avoid disclosure of individual operations.

<sup>2</sup> Top five counties include: Clackamas, Marion, Multnomah, Washington, and Yamhill.

<sup>3</sup> Acreage data not collected for 2006.



(continued from page 1)

Overall the value of nursery sales increased \$89 million and no category decreased from last year. Container sales, increased \$45 million over last year, while balled and burlapped products gained \$14.9 million, Bare root products increased \$12.5 million, other plant material increased \$10.6 million, and greenhouse products increased \$6.0 million.

Gross sales, when broken down by sales size groups, showed increases in four size groups and decreases in two size groups. The largest size group, 2+ million, increased 11 percent or \$73.6 million over 2005 and the second largest size group \$500,000 to \$2 million also increased 11 percent, but only \$16.1 million.

Firms with sales over \$2 million made up 74.0 percent of all Oregon sales, and the total number of firms in this group increased 3 firms to a total of 91 firms.

Oregon top four counties of production, Marion, Washington, Clackamas, and Yamhill had sales of \$230.9 million, \$212.6 million, \$212.5 million, and \$125.7 million, respectively. In total, these four counties accounted for 81 percent of all the sales. When Multnomah County's sales of \$47.0 million are included, the total value of production in the top five counties account for 86 percent of total production. Marion County is now the major production area, and Washington and Clackamas counties are virtually tied for second place. Given the number of growers and acres in production in Clackamas, Washington, and Marion counties, any of these three could be the number one producer next year.

#### Nursery and greenhouse: Acreage by plant material, Oregon, 1997, 1999, 2001, 2003, and 2005 <sup>1</sup>

| Plant material                     | 1997          | 1999          | 2001          | 2003          | 2005          | 2005/2003      |
|------------------------------------|---------------|---------------|---------------|---------------|---------------|----------------|
|                                    | <i>Acres</i>  | <i>Acres</i>  | <i>Acres</i>  | <i>Acres</i>  | <i>Acres</i>  | <i>Percent</i> |
| Bare root                          | 10,100        | 10,800        | 11,800        | 12,000        | 13,200        | 110            |
| B & B                              | 12,100        | 14,660        | 15,500        | 17,500        | 18,700        | 107            |
| Container                          | 5,100         | 5,500         | 5,600         | 6,900         | 8,600         | 125            |
| Greenhouse                         | 630           | 640           | 700           | 800           | 800           | 100            |
| Other plant materials <sup>2</sup> | 5,300         | 5,500         | 6,700         | 6,200         | 5,500         | 89             |
| Other acreage <sup>3</sup>         | 4,900         | 4,000         | 4,900         | 7,000         | 5,000         | 71             |
| <b>Total</b>                       | <b>38,130</b> | <b>41,100</b> | <b>45,200</b> | <b>50,400</b> | <b>51,800</b> | <b>103</b>     |

<sup>1</sup> Acreage by plant material is collected once every two years.

<sup>2</sup> Other nursery plant materials include sod, bulbs, tubers, holly, cut greens, strawberry plants, and other materials.

<sup>3</sup> Includes other acres in the nursery operation such as buildings, loading docks, and parking.

#### Nursery and greenhouse: Summary, by sales size group, Oregon, 2005-2006

| Sales size group      | Number of operations |                   | Acres         |                   | Gross sales          |                      | Total workers  |                   | Total wages          |                      |
|-----------------------|----------------------|-------------------|---------------|-------------------|----------------------|----------------------|----------------|-------------------|----------------------|----------------------|
|                       | 2005                 | 2006              | 2005          | 2006 <sup>1</sup> | 2005                 | 2006                 | 2005           | 2006 <sup>1</sup> | 2005                 | 2006 <sup>1</sup>    |
|                       | <i>Operations</i>    | <i>Operations</i> | <i>Acres</i>  | <i>Acres</i>      | <i>1,000 dollars</i> | <i>1,000 dollars</i> | <i>Workers</i> | <i>Workers</i>    | <i>1,000 dollars</i> | <i>1,000 dollars</i> |
| Less than \$20,000    | 1,194                | 1,131             | 2,200         | -                 | 5,900                | 6,100                | 1,170          | -                 | 1,100                | -                    |
| \$20,000-\$99,999     | 483                  | 483               | 2,700         | -                 | 21,600               | 21,000               | 1,400          | -                 | 5,020                | -                    |
| \$100,000-\$199,999   | 94                   | 84                | 1,200         | -                 | 13,200               | 11,800               | 630            | -                 | 4,065                | -                    |
| \$200,000-\$499,999   | 140                  | 146               | 3,700         | -                 | 43,500               | 44,600               | 1,500          | -                 | 13,480               | -                    |
| \$500,000-\$1,999,999 | 152                  | 165               | 11,300        | -                 | 150,900              | 167,000              | 4,600          | -                 | 53,640               | -                    |
| More than \$2,000,000 | 88                   | 91                | 30,700        | -                 | 641,900              | 715,500              | 12,700         | -                 | 216,600              | -                    |
| <b>Total</b>          | <b>2,151</b>         | <b>2,100</b>      | <b>51,800</b> | <b>-</b>          | <b>877,000</b>       | <b>966,000</b>       | <b>22,000</b>  | <b>-</b>          | <b>293,905</b>       | <b>-</b>             |

<sup>1</sup> Data for category only collected once every two years.

## Wages and number of workers<sup>1</sup> - 2005

Firms with sales over 2 million dollars employ 58 percent of the workers, paid 74 percent of the wages, and paid an average wage of \$17,055 dollars per worker. Full time worker numbers continued upward, reaching 10,400 for 2005. Seasonal worker numbers, was unchanged from 2003 at 11,600 workers for 2005. Wages are the biggest expense that nursery and greenhouses have and accounted for 33.5 percent of total sales in 2005.

### Nursery and greenhouse: Workers, and gross wages paid, Oregon, 2005<sup>1</sup>

| Sales size group      | Workers             |                    |                 | Total wages<br>1,000 dollars | Average wages<br>per worker<br>Dollars |
|-----------------------|---------------------|--------------------|-----------------|------------------------------|--|
|                       | Full time<br>Number | Seasonal<br>Number | Total<br>Number |                              |  |
| Less than \$20,000    | 70                  | 1,100              | 1,170           | 1,100                        | 940                                    |
| \$20,000-\$99,999     | 200                 | 1,200              | 1,400           | 5,020                        | 3,586                                  |
| \$100,000-\$199,999   | 130                 | 500                | 630             | 4,065                        | 6,452                                  |
| \$200,000-\$499,999   | 600                 | 900                | 1,500           | 13,480                       | 8,987                                  |
| \$500,000-\$1,999,999 | 2,000               | 2,600              | 4,600           | 53,640                       | 11,661                                 |
| More than \$2,000,000 | 7,400               | 5,300              | 12,700          | 216,600                      | 17,055                                 |
| <b>Total</b>          | <b>10,400</b>       | <b>11,600</b>      | <b>22,000</b>   | <b>293,905</b>               | <b>13,359</b>                          |

<sup>1</sup> Not collected for 2006.

### Nursery and greenhouse: Workers, wages, and number of operations, Oregon, 1995 - 2005<sup>1</sup>

| Category                             | 1995    | 1997    | 1999    | 2001    | 2003    | 2005    | 2005/2003 |
|--------------------------------------|---------|---------|---------|---------|---------|---------|-----------|
| Seasonal workers ..... Workers       | 12,235  | 12,750  | 12,200  | 10,850  | 11,600  | 11,600  | 100       |
| Full time workers ..... Workers      | 7,250   | 8,050   | 9,000   | 9,550   | 10,000  | 10,400  | 104       |
| Total workers ..... Workers          | 19,485  | 20,800  | 21,200  | 20,400  | 21,600  | 22,000  | 102       |
| Total wages ..... 1,000 dollars      | 146,482 | 178,870 | 201,170 | 232,557 | 275,200 | 293,905 | 107       |
| Average wage per worker .... Dollars | 7,518   | 8,600   | 9,489   | 11,400  | 12,741  | 13,359  | 105       |
| Number of operations .... Operations | 1,905   | 2,040   | 2,185   | 2,139   | 2,044   | 2,151   | 105       |

<sup>1</sup> Worker and wage data are collected once every two years.



**Nursery and greenhouse: Destination of gross sales by plant material, Oregon, 1995, 1999, and 2003<sup>1</sup>**

| Destination                       | Plant material type  |                      |                      |                      |                      |                      |                      |                      |                      |
|-----------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
|                                   | Bare root            |                      |                      | B & B                |                      |                      | Container            |                      |                      |
|                                   | 1995                 | 1999                 | 2003                 | 1995                 | 1999                 | 2003                 | 1995                 | 1999                 | 2003                 |
|                                   | <i>1,000 dollars</i> |
| Oregon                            | 19,420               | 20,610               | 19,000               | 15,690               | 18,560               | 24,780               | 30,240               | 42,280               | 53,380               |
| Washington                        | 8,185                | 8,480                | 9,000                | 8,850                | 9,850                | 11,920               | 15,090               | 25,860               | 31,930               |
| California                        | 4,625                | 6,390                | 8,830                | 2,346                | 4,060                | 5,950                | 8,150                | 16,900               | 17,770               |
| Other western States <sup>2</sup> | 3,225                | 4,670                | 8,000                | 8,085                | 8,560                | 15,330               | 13,080               | 25,510               | 31,030               |
| Upper Midwest <sup>3</sup>        | 20,130               | 21,560               | 37,660               | 9,490                | 15,160               | 23,570               | 31,620               | 36,060               | 62,480               |
| Gulf States <sup>4</sup>          | 4,800                | 4,690                | 5,910                | 1,315                | 2,680                | 3,470                | 3,660                | 6,450                | 10,340               |
| Atlantic States <sup>5</sup>      | 9,375                | 24,400               | 27,100               | 5,937                | 12,860               | 21,150               | 11,300               | 30,950               | 32,840               |
| Northeast States <sup>6</sup>     | 9,345                | 21,050               | 24,650               | 13,450               | 21,900               | 36,060               | 24,110               | 33,160               | 49,970               |
| Western Canada <sup>7</sup>       | 2,070                | 2,770                | 2,300                | 1,654                | 1,750                | 1,950                | 6,260                | 3,210                | 3,810                |
| Eastern Canada <sup>8</sup>       | 845                  | 1,220                | 6,950                | 760                  | 2,120                | 3,220                | 4,260                | 2,440                | 4,590                |
| Other foreign countries           | 880                  | 460                  | 700                  | 223                  | -                    | -                    | 330                  | 280                  | 160                  |
| <b>Total</b>                      | <b>82,900</b>        | <b>116,300</b>       | <b>150,100</b>       | <b>67,800</b>        | <b>97,500</b>        | <b>147,400</b>       | <b>148,100</b>       | <b>223,100</b>       | <b>298,300</b>       |

**Nursery and greenhouse: Destination of gross sales by plant material, Oregon, 1995, 1999, and 2003<sup>1</sup> (continued)**

| Destination                       | Plant material type  |                      |                      |                      |                      |                      |                      |                      |                      | 2003/<br>1999  | Percent<br>of total<br>sales by<br>destination |
|-----------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------|--|
|                                   | Greenhouse           |                      |                      | Other                |                      |                      | Total                |                      |                      |                |  |
|                                   | 1995                 | 1999                 | 2003                 | 1995                 | 1999                 | 2003                 | 1995                 | 1999                 | 2003                 |                |  |
|                                   | <i>1,000 dollars</i> | <i>Percent</i> | <i>Percent</i>                                 |
| Oregon                            | 47,415               | 60,680               | 73,480               | 13,670               | 17,450               | 19,130               | 126,435              | 159,580              | 189,770              | 119            | 24.4   |
| Washington                        | 11,275               | 14,920               | 18,260               | 4,010                | 2,320                | 4,490                | 47,410               | 61,430               | 75,600               | 123            | 9.7  |
| California                        | 10,160               | 9,700                | 9,340                | 5,630                | 9,670                | 12,080               | 30,911               | 46,720               | 53,970               | 116            | 6.9  |
| Other western States <sup>2</sup> | 1,710                | 2,150                | 4,130                | 1,140                | 1,030                | 2,640                | 27,240               | 41,920               | 61,130               | 146            | 7.8  |
| Upper Midwest <sup>3</sup>        | 4,325                | 3,680                | 4,610                | 3,350                | 2,810                | 3,870                | 68,915               | 79,270               | 132,190              | 167            | 17.0   |
| Gulf States <sup>4</sup>          | 1,600                | 2,030                | 1,670                | 1,900                | 1,890                | 3,220                | 13,275               | 17,740               | 24,610               | 139            | 3.2  |
| Atlantic States <sup>5</sup>      | 1,475                | 3,260                | 2,310                | 4,020                | 2,750                | 3,380                | 32,107               | 74,220               | 86,780               | 117            | 11.1   |
| Northeast States <sup>6</sup>     | 2,150                | 3,350                | 4,940                | 2,320                | 2,290                | 5,520                | 51,375               | 81,750               | 121,140              | 148            | 15.6   |
| Western Canada <sup>7</sup>       | 2,015                | 2,060                | 2,450                | 450                  | 360                  | 910                  | 12,449               | 10,150               | 11,420               | 113            | 1.5  |
| Eastern Canada <sup>8</sup>       | 1,025                | 1,090                | 2,410                | 180                  | 690                  | 1,460                | 7,070                | 7,560                | 18,630               | 246            | 2.4  |
| Other foreign countries           | 350                  | 180                  | 700                  | 30                   | 2,740                | 2,200                | 1,813                | 3,660                | 3,760                | 103            | 0.5  |
| <b>Total</b>                      | <b>83,500</b>        | <b>103,100</b>       | <b>124,300</b>       | <b>36,700</b>        | <b>44,000</b>        | <b>58,900</b>        | <b>419,000</b>       | <b>584,000</b>       | <b>779,000</b>       | <b>133</b>     | <b>100.0</b>                                   |

<sup>1</sup> Gross sales by destination is collected once every five years. The 2007 publication, which is scheduled for release in September 2008, will be the next release containing these data.

<sup>2</sup> Other western States include: MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI.

<sup>3</sup> Upper Midwest includes: ND, SD, NE, KS, MN, IA, MO, WI, IL, MI, IN, OH, KY.

<sup>4</sup> Gulf States include: OK, TX, AR, LA, TN, MS, AL.

<sup>5</sup> Atlantic States include: MD, DE, WV, VA, NC, SC, GA, FL.

<sup>6</sup> Northeast States include: ME, NH, VT, MA, CT, RI, NY, PA, NJ.

<sup>7</sup> Western Canada includes: BC, AB, SK, MB.

<sup>8</sup> Eastern Canada includes all other provinces.

## Data collection

The 2006 Oregon Nursery and Greenhouse Survey was designed to collect data on all commercial nurseries, greenhouses, and producers of other plant material, such as cut roses, cut holly, bulbs, sod, strawberry plants, cut flowers, dried flowers, etc. in the State. A stratified random sample of 657 names was selected from the State of Oregon's list of licensed nurseries and greenhouses for 2006. They were classified into six broad size groups based on sales volume. The Oregon Agricultural Statistics Service's floriculture survey was used to supplement the list for those firms who are not required to have a State license.

Questionnaires were mailed to the sampled names on June 8, 2007, followed by a second request on July 16. All non-respondents were phoned or visited during early August. Cooperation was excellent with 90 percent of the sampled names participating in the survey. Data for minor counties and items were combined with other totals to avoid disclosure of individual operations.

The sample design was developed by the National Agricultural Statistics Service. Kent Hoddick of the Oregon Staff has been the survey coordinator of the Oregon Nursery and Greenhouse program since its inception in 1991.

### Nursery and greenhouse: Number of operations, by sales size group, Oregon, 2000-2006

| Sales size group      | Number of operations |              |              |              |              |              |              |
|-----------------------|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|
|                       | 2000                 | 2001         | 2002         | 2003         | 2004         | 2005         | 2006         |
| Less than \$20,000    | 1,324                | 1,337        | 1,375        | 1,182        | 1,194        | 1,194        | 1,131        |
| \$20,000-\$99,999     | 343                  | 362          | 353          | 389          | 396          | 483          | 483          |
| \$100,000-\$199,999   | 103                  | 98           | 106          | 112          | 115          | 94           | 84           |
| \$200,000-\$499,999   | 126                  | 138          | 136          | 136          | 140          | 140          | 146          |
| \$500,000-\$1,999,999 | 137                  | 134          | 142          | 149          | 144          | 152          | 165          |
| More than \$2,000,000 | 69                   | 70           | 71           | 76           | 84           | 88           | 91           |
| <b>Total</b>          | <b>2,102</b>         | <b>2,139</b> | <b>2,183</b> | <b>2,044</b> | <b>2,073</b> | <b>2,151</b> | <b>2,100</b> |

### Nursery and greenhouse: Gross sales and operations, historic trends, Oregon, 1990-2006

| Year        | Gross sales          | Change from previous year | Operations        |   |
|-------------|----------------------|---------------------------|-------------------|---|
|             |                      |                           | Total operations  | Operations with over \$2 million in sales |
|             | <i>1,000 dollars</i> | <i>Percent</i>            | <i>Operations</i> | <i>Operations</i>                         |
| 1990        | 315,000              | ( <sup>1</sup> )          | ( <sup>1</sup> )  | ( <sup>1</sup> )                          |
| 1991        | 341,000              | 108                       | 1,704             | ( <sup>1</sup> )                          |
| 1992        | 345,000              | 101                       | 1,900             | ( <sup>1</sup> )                          |
| 1993        | 347,000              | 101                       | 1,986             | ( <sup>1</sup> )                          |
| 1994        | 385,000              | 111                       | 1,979             | 32  |
| 1995        | 419,000              | 109                       | 1,905             | 38  |
| 1996        | 448,000              | 107                       | 1,983             | 41  |
| 1997        | 492,000              | 110                       | 2,040             | 40  |
| 1998        | 532,000              | 108                       | 2,082             | 43  |
| 1999        | 584,000              | 110                       | 2,185             | 62  |
| 2000        | 642,000              | 110                       | 2,102             | 69  |
| 2001        | 680,000              | 106                       | 2,139             | 70  |
| 2002        | 727,000              | 107                       | 2,183             | 71  |
| 2003        | 779,000              | 107                       | 2,044             | 76  |
| 2004        | 844,000              | 108                       | 2,073             | 84  |
| 2005        | 877,000              | 104                       | 2,151             | 88  |
| <b>2006</b> | <b>966,000</b>       | <b>110</b>                | <b>2,100</b>      | <b>91</b>                                 |

<sup>1</sup> No data available.



## OREGON NURSERY AND GREENHOUSE SURVEY 2006



**Oregon Field Office**  
 1220 S.W. 3rd Ave. Room 1735  
 Portland, OR 97204,  
 Phone 503-326-2131, Fax 503-326-2549  
[nass-or@nass.usda.gov](mailto:nass-or@nass.usda.gov)  
[www.nass.usda.gov/or](http://www.nass.usda.gov/or)

Please take a few minutes to complete the annual Nursery and Greenhouse Survey that is the only source of measuring annual growth and change of Oregon's major agricultural industry. The nursery/greenhouse report will be released in August 2007 and is used extensively by your industry, universities, the legislature and local governments for informed decision making concerning issues affecting the industry. Thank you for your help.

Please make corrections to name, address, and Zip Code, if necessary.

### SECTION 1 - INTRODUCTION

1. Did you produce, sell, or have growing any nursery or greenhouse crops (including container grown), bulbs, sod, bedding plants, cut flowers, holly and dried flowers, etc. during 2006?

**YES** – Please go to Section 2.     **NO** – Please go to Section 3 on the back page.

SAMPLE



### SECTION 2 – GROSS SALES VALUE

2. What were your gross (invoice) sales from your nursery and greenhouse operation for each of the following plant material categories, and in total during 2006? If calendar year data are not available, please use the most recent fiscal year period.  
 (Exclude plant material purchased for immediate resale.)

- a. Bare Root ..... +
- b. Balled and Burlapped ..... +
- c. Container ..... +
- d. Greenhouse ..... +
- e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.) . +
- f. **TOTAL** (Should equal a+b+c+d+e) ..... +

| <b>2006 GROSS SALES<br/>(IN DOLLARS)</b> |     |
|--|-----|
|  | 311 |
|  | 312 |
|  | 313 |
|  | 314 |
|  | 315 |
|  | 310 |

**Continue**

3. List the Oregon county or counties where your nursery or greenhouse acreage is located. If your acreage is in more than one county, list each county separately with the percent of gross sales by county. (Exclude acreage located in other States.)

| COUNTY   | 2006 GROSS SALES |             |
|--|------------------|-------------|
|  | DOLLAR VALUE     | OR PERCENT  |
| _____ +  | 611              | 621         |
| _____ +  | 612              | 622         |
| _____ +  | 613              | 623         |
| _____ +  | 614              | 624         |
| <b>TOTAL</b> (Should equal total in item 2f on page 1) = | 615              | <b>100%</b> |

| OFFICE USE |
|------------|
| 601        |
| 602        |
| 603        |
| 604        |

GO TO SECTION 4

**SECTION 3 – CHANGE IN OPERATOR**

4. Has this operation been sold, rented out, or turned over to someone else?

**YES** – Please identify the new operator.

**NO** – Please check one reason which applies.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State: \_\_\_\_\_ Zip: \_\_\_\_\_

Retail sales only

New operation with no 2006 sales.

Other (Explain) \_\_\_\_\_

Landlord

**SECTION 4 – SURVEY RESULTS**

5. Would you like to receive a copy of the results of this survey?  Yes  No

If additional help is needed, please call: 1-800-338-2157

In Portland area, please call: 503-326-2131

**COMMENTS**

| OFFICE USE |
|------------|
| 099        |
| 910        |
| 920        |

Reported by: \_\_\_\_\_ Phone: \_\_\_\_\_ Date: \_\_\_\_\_

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The time required to complete this information collection is estimated to average 10 minutes per response.

## **Additional references to recent Oregon horticulture data**

Oregon Nursery and Greenhouse Summary, (1995 to Current)  
[www.nass.usda.gov/Statistics\\_by\\_State/Oregon/Publications/Horticulture](http://www.nass.usda.gov/Statistics_by_State/Oregon/Publications/Horticulture)

National Nursery Crops Summary: United States and State data, (2001 to Current)  
[usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1115](http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1115)  
**2006 to be published September 24, 2007**

Agricultural Chemical Usage: Nursery and Floriculture Summary, (2001 to Current)  
[usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1570](http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1570)  
**2006 to be published November or December 2007**

Floriculture Crops: United States and State data, (1978 to Current)  
[usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1072](http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1072)

2002 Census of Agriculture with comparisons to 1997: United States and State data. 11 pages.  
[www.nass.usda.gov/census/census02/volume1/us/st99\\_2\\_034\\_034.pdf](http://www.nass.usda.gov/census/census02/volume1/us/st99_2_034_034.pdf)

2002 Census of Agriculture with comparisons to 1997: Oregon summary. 1 page.  
[www.nass.usda.gov/census/census02/volume1/or/st41\\_1\\_038\\_039.pdf](http://www.nass.usda.gov/census/census02/volume1/or/st41_1_038_039.pdf)

2002 Census of Agriculture with comparisons to 1997: Oregon County data. 6 pages.  
[www.nass.usda.gov/census/census02/volume1/or/st41\\_2\\_034\\_034.pdf](http://www.nass.usda.gov/census/census02/volume1/or/st41_2_034_034.pdf)

1998 Census of Horticultural Specialties: Published in 2000. 286 pages.  
[www.nass.usda.gov/census/census97/horticulture/horticulture.htm](http://www.nass.usda.gov/census/census97/horticulture/horticulture.htm)

Oregon Association of Nurseries

[www.oan.org](http://www.oan.org)

29751 SW Town Center Loop W, Wilsonville, OR 97070

Tel: 503-682-5089 Toll-free: 1-800-342-6401

Fax: 503-682-5099