

2001

OREGON NURSERY

and

GREENHOUSE

SURVEY

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Janice A. Goodwin, State Statistician  
Bruce Eklund, Deputy State Statistician

Kent Hoddick, Agricultural Statistician  
Chuck Bennett, Statistical Assistant

Vera Korn, Editor

## FOREWORD

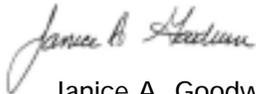
August 2002

I am pleased to present the results of the 2001 Oregon Nursery and Greenhouse Survey. Thanks to the support of the State's producers, the Oregon Association of Nurserymen, the Oregon Department of Agriculture, our field enumerator staff, and the U.S. Congress, this survey has provided a window into the state of Oregon's leading industry for 11 consecutive years.

Oregon's nursery and greenhouse industry continues to rank #1 in the State's agriculture, with 2001 total gross value of sales coming in at \$680 million. The industry's annual rate of growth slowed somewhat, increasing 6 percent over 2000, which is down from the 10 percent increases seen in both of the previous two years. Container sales continued its historical trend of dominating the product categories, accounting for 36 percent of the total sales. The number of operations climbed slightly in 2001, to 2,139, up from the previous year's 2,102. In recent years, the number of operations has remained fairly constant, falling in the range of 1,900 - 2,200. The top five counties in terms of gross sales were Clackamas, Marion, Washington, Yamhill, and Multnomah, which is consistent with the previous three years. Prior to 1998, Clackamas and Marion counties vied for first place.

I hope that this report will be used extensively in the next year to add a quantitative, objective perspective to discussions and decisions related to this industry which so beautifies both our urban and rural landscapes.

Sincerely,



Janice A. Goodwin  
State Statistician

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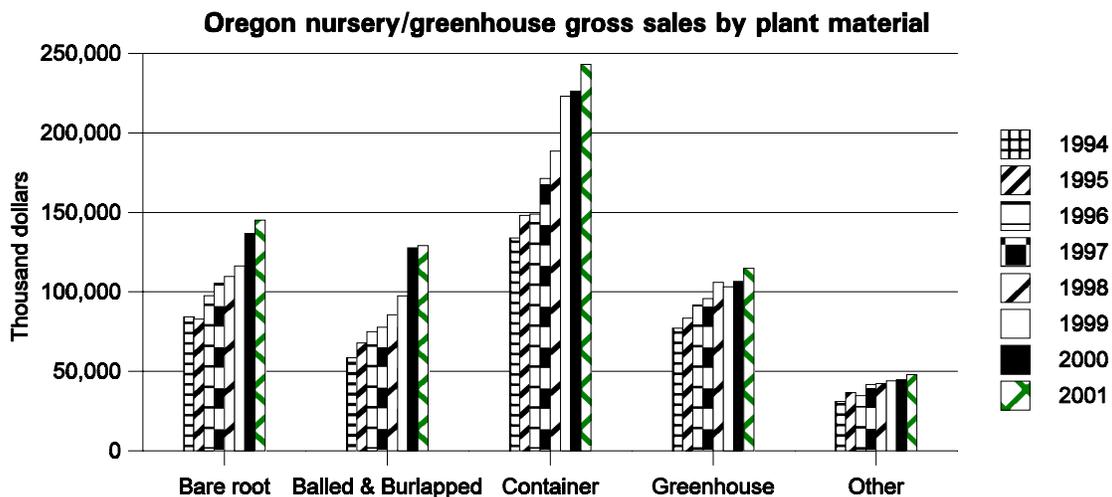
## 2001 Oregon nursery sales set another record

Oregon's nursery and greenhouse industry continued its growth in 2001 by establishing yet another record high sales total of \$680 million, marking the eleventh straight year that record sales were recorded. Sales in 2001 rose 6 percent above 2000 and were 216 percent higher than in 1990. The industry further solidified its place atop all Oregon agricultural commodities by claiming the top ranking for the ninth consecutive year. Cattle, with a value of \$423 million, ranked second while all hay and all grass seeds claimed third and fourth places with sales of \$337 million and \$324 million, respectively.

Forty-four percent of the total \$38 million sales increase this year was in container sales. Greenhouse products gained 8 percent while other product sales advanced 7 percent over last year. All categories of sales were higher in 2001 compared to 2000.

### Nursery/greenhouse gross sales: By plant material 1994 - 2001

Plant material	Gross sales								<u>2001</u> 2000
	1994	1995	1996	1997	1998	1999	2000	2001	
	<i>1,000</i>	<i>Percent</i>							
	<i>dollars</i>	<i>change</i>							
Bare Root	84,300	82,900	97,600	105,400	109,700	116,300	136,700	145,100	106
B & B	58,500	67,800	75,000	77,800	85,500	97,500	127,700	129,100	101
Container	133,900	148,100	148,900	171,300	188,500	223,100	226,300	243,100	107
Greenhouse	77,200	83,500	91,800	95,800	105,900	103,100	106,600	114,700	108
Other	31,100	36,700	34,700	41,700	42,400	44,000	44,700	48,000	107
Total	385,000	419,000	448,000	492,000	532,000	584,000	642,000	680,000	106



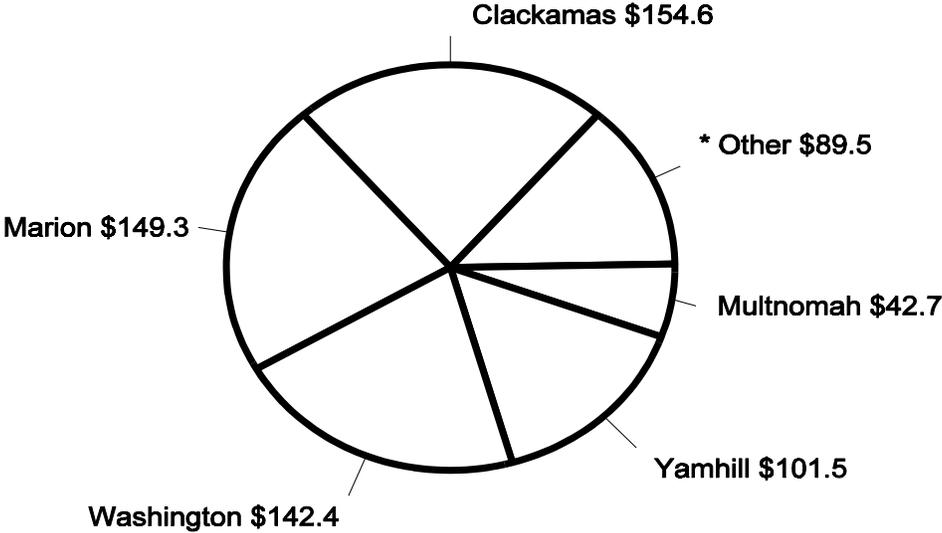
**Number of operations: Acreage and gross sales by county, 1999 - 2001**

	Number of operations	Acres	Gross sales			
	2001	2001	1999	2000	2001	2001/2000
	<i>Number</i>	<i>Acres</i>	<i>1,000 Dollars</i>	<i>1, 000 Dollars</i>	<i>1, 000 Dollars</i>	<i>Percent change</i>
Benton	44	315	2,030	2,250	1,830	81
Clackamas	464	12,300	143,760	148,350	154,575	104
Curry	21	480	2,770	2,990	3,940	132
Deschutes	43	300	1,950	1,850	2,820	152
Douglas	57	550	5,220	4,690	5,040	107
Jackson	69	120	2,430	2,640	3,390	128
Josephine	52	130	2,530	3,010	2,480	82
Klamath	18	970	8,490	6,430	9,950	155
Lane	145	540	15,090	15,550	16,810	108
Lincoln	25	150	3,140	2,670	2,780	104
Linn	84	600	8,210	8,020	11,710	146
Marion	355	10,800	131,490	143,370	149,320	104
Multnomah	201	3,450	34,790	34,810	42,710	123
Polk	50	1,030	9,740	9,860	8,370	85
Umatilla	13	600	4,130	4,420	3,900	88
Washington	240	6,080	109,410	129,630	142,360	110
Yamhill	103	5,030	84,810	103,115	101,460	98
Other <sup>1/</sup>	155	1,755	14,010	18,345	16,555	90
<b>Total</b>	<b>2,139</b>	<b>45,200</b>	<b>584,000</b>	<b>642,000</b>	<b>680,000</b>	<b>106</b>

1/ Contains counties with less than 1 million dollars of sales and other counties which were combined to avoid disclosure.

# Nursery/greenhouse gross sales by county, Oregon - 2001

Oregon - \$680 million



\* Other : Lane \$16.8, Polk \$8.4, Douglas \$5.0, Linn \$11.7, Klamath \$10.0, Umatilla \$3.9, Lincoln \$2.8, Curry \$3.9, Josephine \$2.5, Jackson \$3.4, Benton \$1.8, Deschutes \$2.8, Other Misc. Counties \$16.6.

## Clackamas County is Top

Clackamas County with sales of 155 million was the leading county of sales for the fourth straight year. Marion County was a close second in sales with 149 million. Ranked third, fourth, and fifth were Washington, Yamhill, and Multnomah counties, occupying the same positions they held a year earlier. Sales in Washington County were \$142 million, Yamhill totaled \$101 million and Multnomah generated \$43 million. The top 5 counties accounted for 87 percent of the State's sales, the same as a year earlier. The metro counties (Clackamas, Multnomah and Washington) account for half the State's sales. The Willamette Valley share of gross revenues held steady at 93 percent.

## Acreege in production increases

Area in production, at 45,200 acres, was 10 percent higher than in 1999, the last time acreage was surveyed. Since 1991, acreage has increased 42 percent. By types of plant material, acreage was higher for all categories compared to 1999.

### Acreege by plant material 1993, 1995, 1997, 1999, 2001

Plant material	1993	1995	1997	1999	2001	<u>2001</u> 1999
	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Percent change</i>
Bare Root	9,500	10,600	10,100	10,800	11,800	109
B & B	11,400	10,800	12,100	14,660	15,500	106
Container	3,900	4,400	5,100	5,500	5,600	102
Greenhouse	550	600	630	640	700	109
Other	4,000	5,100	5,300	5,500	6,700	122
Other acreage in operation	4,350	4,400	4,900	4,000	4,900	123
Total	33,700	35,900	38,130	41,100	45,200	110

### Gross sales, by sales value, 1997 - 2001

Sales size group	Gross sales					
	1997	1998	1999	2000	2001	<u>2001</u> 2000
	<i>1,000 dollars</i>	<i>Percent change</i>				
Less than \$20,000	8,700	7,600	7,200	8,800	6,300	72
\$20,000 - \$99,999	18,500	17,500	15,000	15,800	16,100	102
\$100,000 - \$199,999	20,000	19,600	17,600	14,600	14,000	96
\$200,000 - \$499,999	38,500	44,700	38,500	37,900	44,400	117
\$500,000 - \$1,999,999	134,300	135,900	125,500	130,200	130,500	100
More than \$2,000,000	272,000	306,700	380,200	434,700	468,700	108
Total	492,000	532,000	584,000	642,000	680,000	106

The Oregon nursery industry had a combined payroll of \$233 million, 16 percent more than in 1999, the last time wage data were collected. Total workers were 4 percent lower, at 20,400, but the number of full-time workers has increased steadily since the first survey in 1991. Annual wages per worker averaged \$11,400, up 20 percent from 1999. Compared with 1991, total wages paid are up 203 percent.

### Number of workers employed in the nursery/greenhouse industry and gross wages paid - 2001

Sales size group	Full time	Seasonal	Total workers	Total wages	Average wages per worker
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Dollars</i>	<i>Dollars</i>
Less than \$20,000	50	800	850	1,640,000	1,929
\$20,000 - \$99,999	250	1,050	1,300	4,739,000	3,645
\$100,000 - \$199,999	200	550	750	4,238,000	5,651
\$200,000 - \$499,999	700	1,100	1,800	15,628,000	8,682
\$500,000 - \$1,999,999	1,900	2,900	4,800	47,819,000	9,962
More than \$2,000,000	6,450	4,450	10,900	158,493,000	14,541
Total	9,550	10,850	20,400	232,557,000	11,400

### Number of workers, wages and number of operations 1995 -2001

	1995	1997	1999	2001	<u>2001</u> 1999
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Percent change</i>
Seasonal workers	12,235	12,750	12,200	10,850	89
Full time workers	7,250	8,050	9,000	9,550	106
Total workers	19,485	20,800	21,200	20,400	96
Total wages (\$)	146,482,000	178,870,000	201,170,000	232,557,000	116
Average wages per worker (\$)	7,518	8,600	9,489	11,400	120
Number of operations	1,905	2,040	2,185	2,139	98

### Nursery/greenhouse summary - 2001

Sales size group	Number of operations	Acres	Gross sales	Total workers	Total wages
	<i>Number</i>	<i>Acres</i>	<i>1,000 Dollars</i>	<i>Number</i>	<i>Dollars</i>
Less than \$20,000	1,337	2,730	6,300	850	1,640,000
\$20,000 - \$99,999	362	2,280	16,100	1,300	4,739,000
\$100,000 - \$199,999	98	1,460	14,000	750	4,238,000
\$200,000 - \$499,999	138	3,970	44,400	1,800	15,628,000
\$500,000 - \$1,999,999	134	10,090	130,500	4,800	47,819,000
More than \$2,000,000	70	24,670	468,700	10,900	158,493,000
Total	2,139	45,200	680,000	20,400	232,557,000

### 2001 Data collection

The 2001 Oregon Nursery and Greenhouse Survey was designed to collect data on all commercial nurseries, greenhouses, and producers of other plant material, such as roses, holly, bulbs, sod, cut flowers, dried flowers, etc. in the State. A stratified random sample of 699 names was selected from the state of Oregon's list of licensed nurseries and greenhouses for 2001. They were classified into six broad size groups based on sales volume. The Oregon Agricultural Statistics Service floriculture survey was used to supplement the list for those firms in the industry who are not required to have a State license.

Questionnaires were mailed to the sampled names on June 12, 2002, followed by a second request on July 3. All non-respondents were phoned or visited from July 22 to August 3. Cooperation was excellent with 87 percent of the sampled names cooperating. 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.

### Number of operations and survey sampling 2000 & 2001

Sales size group	Number of operations		Operations in sample	
	2000	2001	2000	2001
Less than \$20,000	1,324	1,337	150	137
\$20,000 - \$99,999	343	362	127	122
\$100,000 - \$199,999	103	98	103	98
\$200,000 - \$499,999	126	138	126	138
\$500,000 - \$1,999,999	137	134	137	134
More than \$2,000,000	69	70	69	70
Total	2,102	2,139	712	699

**Destination of gross sales by plant material, 1995 and 1999 <sup>8/</sup>**

Destination	Plant material type												Percent of sales by destination
	Bare root		B & B		Container		Greenhouse		Total		1999 1995	Percent	
	1999	1,000 Dollars	1999	1,000 Dollars	1999	1,000 Dollars	1999	1,000 Dollars	1999	1,000 Dollars			
	1995	1,000 Dollars	1995	1,000 Dollars	1995	1,000 Dollars	1995	1,000 Dollars	1995	1,000 Dollars			
Oregon	19,420	20,610	15,690	18,560	30,240	42,280	47,415	60,680	126,435	159,580	126	27.3	
Washington	8,185	8,480	8,850	9,850	15,090	25,860	11,275	14,920	47,410	61,430	130	10.5	
California	4,625	6,390	2,346	4,060	8,150	16,900	10,160	9,700	30,911	46,720	151	8.0	
Other western States <sup>1/</sup>	3,225	4,670	8,085	8,560	13,080	25,510	1,710	2,150	27,240	41,920	154	7.2	
Upper Midwest <sup>2/</sup>	20,130	21,560	9,490	15,160	31,620	36,060	4,325	3,680	68,915	79,270	115	13.6	
Gulf States <sup>3/</sup>	4,800	4,690	1,315	2,680	3,660	6,450	1,600	2,030	13,275	17,740	134	3.1	
Atlantic States <sup>4/</sup>	9,375	24,400	5,937	12,860	11,300	30,950	1,475	3,260	32,107	74,220	231	12.7	
Northeast States <sup>5/</sup>	9,345	21,050	13,450	21,900	24,110	33,160	2,150	3,350	51,375	81,750	159	14.0	
Western Canada <sup>6/</sup>	2,070	2,770	1,654	1,750	6,260	3,210	2,015	2,060	12,449	10,150	82	1.7	
Eastern Canada <sup>7/</sup>	845	1,220	760	2,120	4,260	2,440	1,025	1,090	7,070	7,560	107	1.3	
Foreign Countries	880	460	223	--	330	280	350	180	1,813	3,660	202	.6	
<b>Total</b>	<b>82,900</b>	<b>116,300</b>	<b>67,800</b>	<b>97,500</b>	<b>148,100</b>	<b>223,100</b>	<b>83,500</b>	<b>103,100</b>	<b>419,000</b>	<b>584,000</b>	<b>139</b>	<b>100</b>	

1/ Other western States include MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI.

2/ Upper Midwest include ND, SD, NE, KS, MN, IA, MO, WI, IL, MI, IN, OH, KY.

3/ Gulf States include OK, TX, AR, LA, TN, MS, AL.

4/ Atlantic States include MD, DE, WV, VA, NC, SC, GA, FL.

5/ Northeast States include ME, NH, VT, MA, CT, RI, NY, PA, NJ.

6/ Western Canada include BC, AB, SK, MB.

7/ Eastern Canada includes all other provinces.

8/ Not collected for 2001, collected every four years.