

OREGON NURSERY

and

GREENHOUSE

SURVEY

2003

2003

OREGON NURSERY

and

GREENHOUSE

SURVEY

Compiled and Published by

United States Department of Agriculture

Oregon Agricultural Statistics Service

Janice A. Goodwin, Director  
Bruce Eklund, Deputy Director

Kent Hoddick, Agricultural Statistician  
Chuck Bennett, Statistical Assistant  
Ron Kriesel, Retired Deputy Director



OREGON  
AGRICULTURAL  
STATISTICS  
SERVICE

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1220 SW 3rd Ave., Room 1735  
Portland, OR 97204

<http://www.usda.gov/or/>

Phone: 503-326-2131 or 1-800-338-2157  
Fax: 503-326-2549 or 1-800-731-7011  
E-Mail: nass-or@nass.usda.gov

## FOREWORD

October 2004

It is a privilege for me to present the results of the **2003 Oregon Nursery and Greenhouse Survey**. We thank the State's nurseries and greenhouses, the Oregon Association of Nurseries, the Oregon Department of Agriculture, our field enumerator staff, our office staff, and the U.S. Congress for their continued support. This effort has produced a thirteen-year record of Oregon's leading agricultural industry. Survey specific questions rotate on a four-year basis, with 2003 again presenting the most detailed industry data.

Nursery and greenhouse industry sales value remains #1 in Oregon's agriculture, with an increase of 7 percent, to a total \$779 million in 2003. The largest firms, those selling \$2 million or more of products, continued to lead in growth -- accounting for 70 percent of total Oregon sales. These firms accounted for less than 4 percent of the total number of operations. Container sales again increased dramatically, accounting for 64 percent of the \$52 million all product sales increase. Also, Balled and Burlapped gross sales value gained an average 18.2 percent per year for the past 11 years. Container sales gains were similar, with 17.5 percent per year over the same period.

There are some interesting trends to note in this dynamic industry. Acreage continues to increase, up 12 percent since 2001 to 50,400 acres. The total number of workers increased 6 percent from 2001, and seasonal workers, after two surveys of declining numbers, increased by 7 percent for 2003. Some shifts in destinations of Oregon nursery product sales became evident from this survey. Since the last destination summary in 1999, sales to Other Western States, Upper Midwest, Gulf States, Northeast States, and Eastern Canada increased significantly. Each of these regions also increased their percentage share of Oregon total sales. All other regional shares declined.

Clackamas, Marion, Washington and Yamhill Counties led in sales. They accounted for nearly 80 percent of the State's total.

Earlier this year, the National Agricultural Statistics Service released the results of the 2003 Nursery Crops Survey, conducted in 17 States. Results show Oregon leading all States in growing area and in sales of shade trees, coniferous evergreens, flowering trees and Christmas trees. The Beaver State was second in number of operations, in number of hired workers, in broadleaf evergreens sales, and in sales of transplants for vegetables and strawberries and tied for second for total value of production and for fruit and nut plant sales. Oregon was third in sales of shrubs and propagation material.

For additional information on horticultural survey results, see links referenced on the last page of this report. These are the 2003 Floriculture Crops Summary, 2003 national Nursery Crops Summary, the 2002 Census of Agriculture, and the 1998 Census of Horticultural Specialties.

Sincerely,

Janice A. Goodwin  
Director

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## 2003 Oregon nursery product sales continue to dominate.

Oregon's horticulture industries continued to grow in 2003 with another record high sales of \$779 million for nursery and greenhouse products. This was the thirteenth year of record sales. Sales in 2003 climbed 7 percent above 2002 and were over 2 ½ times the sales of 1990. 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 \$430 million, ranked second, while all hay and all grass seeds claimed third and fourth places with sales of \$386 million and \$292 million, respectively.

Sixty-four percent of the total \$52 million sales increase this year was in container sales. Balled and Burlapped products gained 4 percent, while the Other product category sales climbed 13 percent over last year. Each category of plant material sales was higher in 2003 than in 2002.

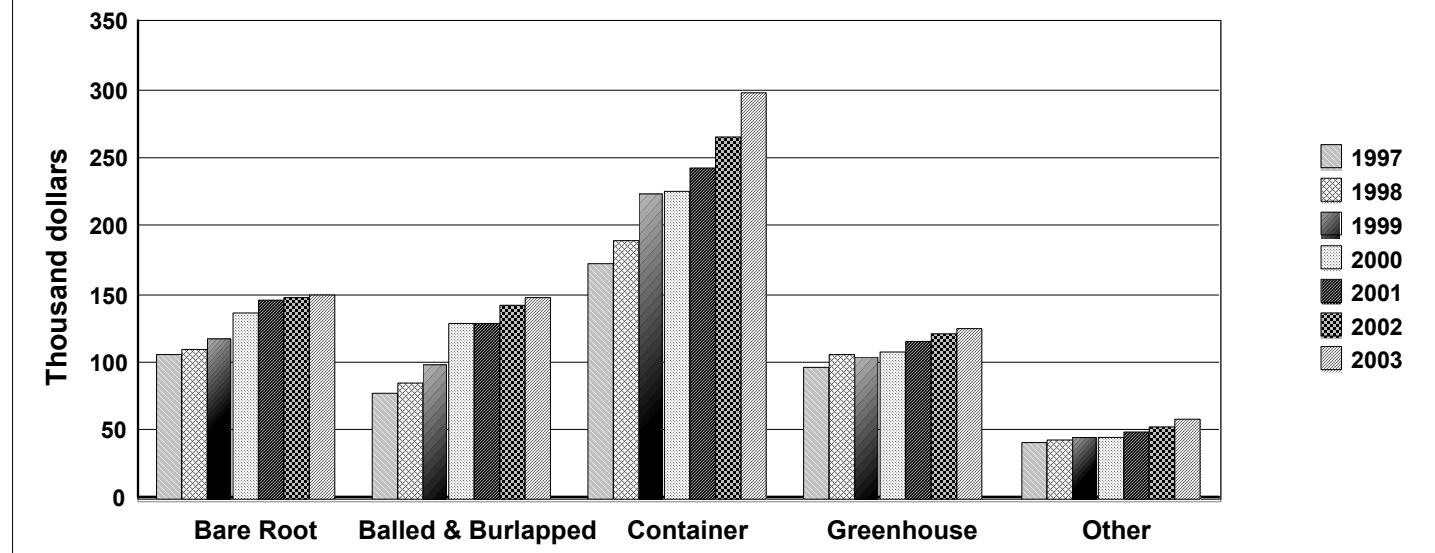
Of note was that Balled and Burlapped gross sales value gained an average 18.2 percent per year for the past 11 years. Container sales value also has a strong trend, gaining an average 17.5 percent per year during the same period.

(continued on page 9)

### Nursery/greenhouse gross sales: By plant material 1997 - 2003

Plant material								2003 2002 Percent change
	1997	1998	1999	2000	2001	2002	2003	
	1,000 dollars	Percent change						
Bare Root	105,400	109,700	116,300	136,700	145,100	147,500	150,100	102
B & B	77,800	85,500	97,500	127,700	129,100	142,100	147,400	104
Container	171,300	188,500	223,100	226,300	243,100	265,100	298,300	113
Greenhouse	95,800	105,900	103,100	106,600	114,700	120,100	124,300	103
Other	41,700	42,400	44,000	44,700	48,000	52,200	58,900	113
Total	492,000	532,000	584,000	642,000	680,000	727,000	779,000	107

### Nursery/greenhouse gross sales: By plant material 1997 - 2003

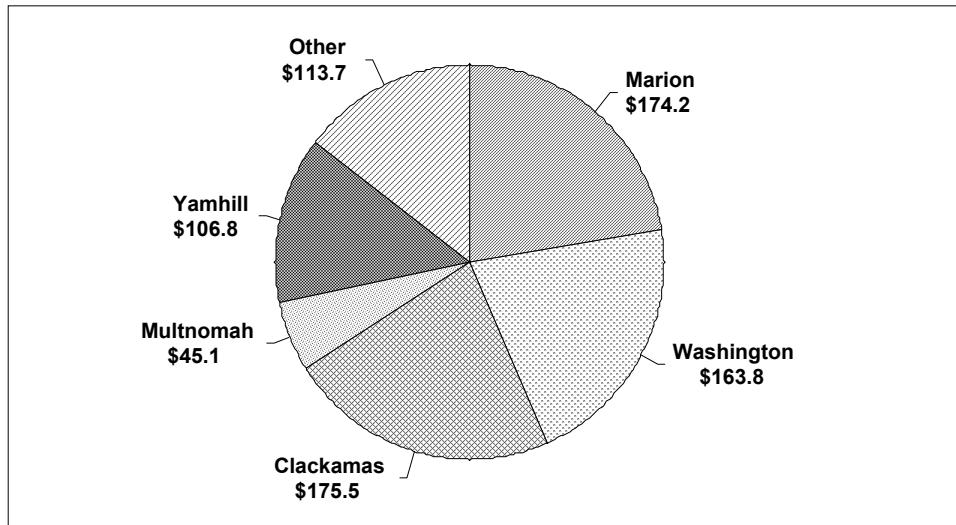


## Number of operations, acreage, and gross sales by county, 2001 - 2003

	Number of operations	Acres	Gross sales			
	2003	2003 <sup>1/</sup>	2001	2002	2003	2003/2002
	Number	Acres	1,000 Dollars	1,000 Dollars	1,000 Dollars	Percent change
Benton	44	330	1,830	1,400	1,500	107
Clackamas	436	12,750	154,575	166,400	175,500	105
Curry	20	480	3,940	4,600	4,750	103
Deschutes	43	310	2,820	3,100	3,550	115
Douglas	53	580	5,040	3,200	3,850	120
Jackson	69	120	3,390	3,100	3,100	100
Josephine	45	130	2,480	2,400	2,400	100
Klamath	15	1,760	9,950	10,100	11,350	112
Lane	134	600	16,810	17,900	20,950	117
Lincoln	21	160	2,780	2,400	2,850	119
Linn	83	580	11,710	9,500	11,650	123
Marion	354	12,200	149,320	165,600	174,150	105
Multnomah	187	3,550	42,710	43,600	45,100	103
Polk	46	1,250	8,370	9,200	10,950	119
Umatilla	10	680	3,900	4,400	5,300	120
Washington	244	7,260	142,360	157,500	163,750	104
Yamhill	99	6,400	101,460	103,600	106,800	103
Other <sup>1/</sup>	141	1,260	16,555	19,000	31,500	166
Total	2,044	50,400	680,000	727,000	779,000	107

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

## Nursery/greenhouse gross sales by county, Oregon - 2003 Oregon - \$779 million



\* Other : Lane \$17.9, Polk \$9.2, Douglas \$3.2, Linn \$9.5, Klamath \$10.1, Umatilla \$4.4, Lincoln \$2.4, Curry \$4.6, Josephine \$2.4, Jackson \$3.1, Benton \$1.4, Deschutes \$3.1, Other Misc. Counties \$19.0.

## Top Four Counties sell nearly 80 percent of State sales

Clackamas, Marion, Washington, and Yamhill Counties, the leaders in Oregon's horticulture production, had sales of \$620 million in 2003. That was 79.6 percent of the State's total sales and was a 4.6 percent increase over 2002. Interestingly, seven counties with small nursery sales all had increases in sales of 15 percent or more over the previous year. These counties are Deschutes, Douglas, Lane, Lincoln, Linn, Polk, and Umatilla. These seven accounted for 7.6 percent of State sales, compared to 6.8 percent a year earlier. These seven averaged a total sales increase of nearly 19 percent over 2002.

## Acreage continues expansion

The nursery/greenhouse acreage was last asked in this survey in 2001. The 2003 data shows acreage has increased nearly 12 percent since then, totaling 50,400 acres for the State. Acreage in eight of the producing counties increased well beyond that State average. Clackamas County continues to lead in number of operations at 436 and in acreage at 12,750 acres. Acreage by plant material categories showed increases over 2001 except for Other plant material, which was off 7 percent. The largest acreage increase was for container plant material, up 23 percent from 2001.

### Acreage by plant material 1995, 1997, 1999, 2001, 2003

Plant material	1995	1997	1999	2001	2003	<u>2003</u> <u>2001</u>
	Acres	Acres	Acres	Acres	Acres	Percent change
Bare Root	10,600	10,100	10,800	11,800	12,000	102
B & B	10,800	12,100	14,660	15,500	17,500	113
Container	4,400	5,100	5,500	5,600	6,900	123
Greenhouse	600	630	640	700	800	114
Other	5,100	5,300	5,500	6,700	6,200	93
Other acreage in operation	4,400	4,900	4,000	4,900	7,000	143
Total	35,900	38,130	41,100	45,200	50,400	112

### Nursery/greenhouse summary by sales size group - 2003

Sales size group	Number of operations	Acres	Gross sales	Total workers	Total wages
	Number	Acres	1,000 Dollars	Number	Dollars
Less than \$20,000	1,182	2,400	6,400	860	1,210,000
\$20,000 - \$99,999	389	2,500	18,100	1,400	5,390,000
\$100,000 - \$199,999	112	1,800	15,900	840	5,020,000
\$200,000 - \$499,999	136	3,900	45,200	1,400	15,500,000
\$500,000 - \$1,999,999	149	11,500	149,400	5,500	58,720,000
More than \$2,000,000	76	28,300	544,000	11,600	189,360,000
Total	2,044	50,400	779,000	21,600	275,200,000

## **Wages and number of workers up**

The number of workers employed increased 6 percent from 2001 to a total of 21,600. Each sales size group reflected part of that increase except the "\$200,000-\$499,999" size group, which dropped 400 workers, a decline of 22 percent from the 2001 survey. While the total wages paid rose 18 percent to a total of \$275.2 million, the State average wage paid to workers only rose by 11.8 percent or to \$12,741 dollars. Full time worker numbers continued upward, reaching 10,000 for 2003. Seasonal worker numbers, after two surveys of declining numbers, increased by 7 percent to 11,600 workers for 2003. Both seasonal and full time worker numbers declined for the "\$200,000-\$499,999" sales size group since the 2001 survey.

### **Number of workers employed in the nursery/greenhouse industry and gross wages paid - 2003**

Sales size group	Full time	Seasonal	Total workers	Total wages	Average wages per worker
	Number	Number	Number	Dollars	Dollars
Less than \$20,000	60	800	860	1,210,000	1,407
\$20,000 - \$99,999	200	1,200	1,400	5,390,000	3,850
\$100,000 - \$199,999	240	600	840	5,020,000	5,976
\$200,000 - \$499,999	600	800	1,400	15,500,000	11,071
\$500,000 - \$1,999,999	2,200	3,300	5,500	58,720,000	10,676
More than \$2,000,000	6,700	4,900	11,600	189,360,000	16,324
Total	10,000	11,600	21,600	275,200,000	12,741

### **Number of workers, wages and number of operations 1997 - 2003**

	1997	1999	2001	2003	<u>2003</u> 2001
	Number	Number	Number	Number	Percent change
Seasonal workers	12,750	12,200	10,850	11,600	107
Full time workers	8,050	9,000	9,550	10,000	105
Total workers	20,800	21,200	20,400	21,600	106
Total wages (\$)	178,870,000	201,170,000	232,557,000	275,200,000	118
Average wages per worker (\$)	8,600	9,489	11,400	12,741	112
Number of operations	2,040	2,185	2,139	2,044	96

## DESTINATIONS OF OREGON NURSERY PRODUCT SALES SHIFTING

Percentage wise, the following destinations showed the strongest gains from the last destination survey in 1999: Other Western States - up 46 percent (\$19.2 million); Upper Midwest - up 67 percent (\$52.9 million); Gulf States - up 39 percent (\$6.9 million); Northeast States - up 48 percent (\$39.4 million); and Eastern Canada - up 146 percent (\$11.1 million). All other destinations also increased but at lesser percent changes. Of course, Oregon remained the largest destination, increasing by \$30.2 million dollars in sales delivered over 1999. Destination sales as a percent of total Oregon sales produced showed increased sales in Other Western States, Upper Midwest, Gulf States, Northeast States, and Eastern Canada, while all other regions declined in sales value share. Virtually all regions showed strong gains in container sales delivered over 1999. Most regions showed good gains in Balled & Burlapped deliveries except Upper Midwest - no change, Atlantic States - declined, Northeast States - declined, and Eastern Canada - declined. Bare root deliveries made modest gains in all regions except Oregon showed a slight decline. The Upper Midwest increased about 75 percent in deliveries for bare root material. Greenhouse and Other plant materials made good gains overall.

### Destination of gross sales by Oregon plant material, 1995, 1999, 2003<sup>8/</sup>

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

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 2000, 2001, or 2002.

**Destination of gross sales by Oregon plant material, 1995, 1999, 2003<sup>8/</sup> (continued)**

Destination	Plant material type						Percent of total sales by destination	
	Greenhouse			Other				
	1995 1,000 dollars	1999 1,000 dollars	2003 1,000 dollars	1995 1,000 dollars	2003 1,000 dollars	Total 1,000 dollars		
Oregon	47,415	60,680	73,480	13,670	17,450	19,130	126,435	
Washington	11,275	14,920	18,260	4,010	2,320	4,490	47,410	
California	10,160	9,700	9,340	5,630	9,670	12,080	30,911	
Other								
Western States <sup>1/</sup>	1,710	2,150	4,130	1,140	1,030	2,640	27,240	
Upper Midwest <sup>2/</sup>	4,325	3,680	4,610	3,350	2,810	3,870	68,915	
Gulf States <sup>3/</sup>	1,600	2,030	1,670	1,900	1,890	3,220	13,275	
Atlantic States <sup>4/</sup>	1,475	3,260	2,310	4,020	2,750	3,380	32,107	
Northeast States <sup>5/</sup>	2,150	3,350	4,940	2,320	2,290	5,520	51,375	
Western Canada <sup>6/</sup>	2,015	2,060	2,450	450	360	910	12,449	
Eastern Canada <sup>7/</sup>	1,025	1,090	2,410	180	690	1,460	7,070	
Other Foreign Countries	350	180	700	30	2,740	2,200	1,813	
Total	83,500	103,100	124,300	36,700	44,000	58,900	419,000	
							584,000	
							779,000	
							133	
							100	

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, IN, MS, AL.

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

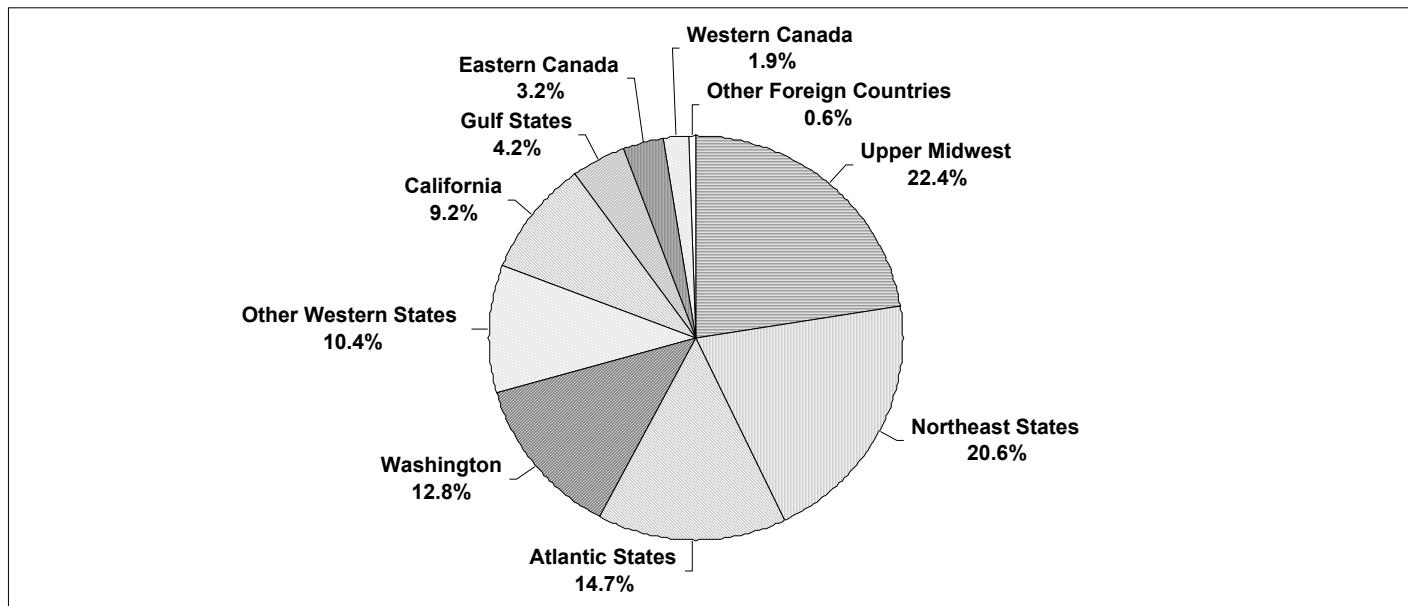
5/ Northeast States include ME, NH, VT, MA, CT, RI, NY, PA, NJ.

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

7/ Eastern Canada includes all other provinces.

8/ Not collected for 2000, 2001, or 2002.

## Nursery/greenhouse percent of shipments out of Oregon by destination - 2003



### Gross sales, by sales value, 1999 - 2003

Sales size group	Gross sales					
	1999 1,000 dollars	2000 1,000 dollars	2001 1,000 dollars	2002 1,000 dollars	2003 1,000 dollars	<u>2003</u> <u>2002</u> Percent change
Less than \$20,000	7,200	8,800	6,300	6,100	6,400	105
\$20,000 - \$99,999	15,000	15,800	16,100	18,000	18,100	101
\$100,000 - \$199,999	17,600	14,600	14,000	15,300	15,900	104
\$200,000 - \$499,999	38,500	37,900	44,400	41,600	45,200	109
\$500,000 - \$1,999,999	125,500	130,200	130,500	149,500	149,400	100
More than \$2,000,000	380,200	434,700	468,700	496,500	544,000	110
Total	584,000	642,000	680,000	727,000	779,000	107

## Data collection

The 2003 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 679 names was selected from the State of Oregon's list of licensed nurseries and greenhouses for 2003. 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 in the industry who are not required to have a State license.

Questionnaires were mailed to the sampled names on June 24, 2004, followed by a second request on July 2nd. All non-respondents were phoned or visited from July 16th to August 7th. Cooperation was excellent, with 89 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 2002 & 2003**

Sales size group	Number of operations		Operations in sample	
	2002	2003	2002	2002
Less than \$20,000	1,375	1,182	120	112
\$20,000 - \$99,999	353	389	124	137
\$100,000 - \$199,999	106	112	106	90
\$200,000 - \$499,999	136	136	136	115
\$500,000 - \$1,999,999	142	149	142	149
More than \$2,000,000	71	76	71	76
Total	2,183	2,044	699	679

### **Number of operations by sales value, 1997 - 2003**

Sales size group	Number of Operations						
	1997	1998	1999	2000	2001	2002	2003
Less than \$20,000	1,292	1,342	1,396	1,324	1,337	1,375	1,182
\$20,000 - \$99,999	341	337	356	343	362	353	389
\$100,000 - \$199,999	131	129	121	103	98	106	112
\$200,000 - \$499,999	111	113	116	126	138	136	136
\$500,000 - \$1,999,999	125	118	135	137	134	142	149
More than \$2,000,000	40	43	62	69	70	71	76
Total	2,040	2,082	2,185	2,102	2,139	2,183	2,044

(continued from page 1)

Gross sales, when broken down by sales size groups, showed increases in all but one group. The largest size group increased the most, 10 percent over 2002. The largest increase in acreage, 3,630 acres, occurred in the "More than \$2 million" sales size group.

The "\$200,000-\$499,999" sales size group had a decline of 22 percent in workers, a 1 percent decline in total wages, and a 2 percent decline in acres since 2001. Operations stayed unchanged at 136, while sales increased 9 percent, both compared to the 2002 survey. The smallest size group, "Less than \$20,000" sales, showed significant declines in number of operations, acres, and total wages paid.

Firms with sales over \$2 million made up 70 percent of all Oregon sales. This group had increased sales of 10 percent over 2002. These 76 firms accounted for less than 4 percent of the number of all operations.

### Gross sales and operations trends 1990-2003

Year	Gross Sales 1,000 dollars	% Change From Last Year	Number of Operations	Number of Firms with sales over \$2 million
1990	315,000	1/	1/	1/
1991	341,000	108	1,704	1/
1992	345,000	101	1,900	1/
1993	347,000	101	1,986	1/
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

1/ Not Available



1220 SW 3rd Ave., Room 1735  
Portland, OR 97204  
503-326-2131 or 1-800-338-2157  
FAX: 326-2549 or 1-800-731-7011

# OREGON NURSERY AND GREENHOUSE SURVEY - 2003

Form Approved  
O.M.B. Number 0535-0244  
Approval Expires 05/31/06  
Project Code 168

S  
A

Dear Nursery/Greenhouse Grower:

The nursery and greenhouse industry is Oregon's leading agricultural industry and nationally is ranked third in the U.S. in production and value. Please take a few minutes to complete the annual *Nursery and Greenhouse Survey* which is the only source of measuring annual growth and change. The survey is voluntary and your individual data are kept confidential. The nursery/greenhouse report will be released in August 2004 and is used extensively by your industry, universities, the legislature and local governments for informed decision making concerning issues affecting both the nursery industry and Oregonians in general.

Sincerely,

M Janice A. Goodwin  
Director

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 2003?

YES - Please go to Section 2.

NO - Please go to back page, Question 9.

## SECTION 2 - NURSERY ACRES OPERATED

2. What was the acreage under production, by plant material type, other nursery acreage, and in total for your operation during 2003? (Please report acres to the nearest one-tenth.)  
(Include acreage even if no sales were made.)

- a. Bare Root .....  
b. Balled and Burlapped .....  
c. Container .....  
d. Greenhouse (enter square footage and acreage) .....  
e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.) .....  
f. Other Nursery Acreage in Operation (buildings, loading docks, parking, etc.) .....  
g. TOTAL ACRES (Should equal items a+b+c+d+e+f) .....

ACRES	
101	.
102	.
103	.
SQUARE FEET	
104	105
106	.
107	.
110	.

continue

## SECTION 2 - NURSERY ACRES OPERATED (cont.)

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	ACRES	PERCENT OF GROSS SALES	OFFICE USE
..... + S .....	611	621	601
..... + A .....	612	622	602
..... + ..... =	613	623	603
..... + ..... =	614	624	604
<b>TOTAL</b> (Acres should equal total in item 2g on page 1) .....	615	<b>100%</b>	

## SECTION 3 - GROSS SALES VALUE

4. What were your gross (invoice) sales from your nursery and greenhouse operation for each of the following plant material categories, and in total during 2003? If calendar year data are not available, please use the most recent fiscal year period. (Exclude plant material purchased for immediate resale.)

M	P	L
a. Bare Root .....	+ 311	
b. Balled and Burlapped .....	+ 312	
c. Container .....	+ 313	
d. Greenhouse .....	+ 314	
e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.) .....	+ 315	
f. <b>TOTAL</b> (Should equal a + b +c + d + e) .....	- 310	

## SECTION 4 - HIRED AND CONTRACT WORKERS

5. What was the total number of workers paid by this operation during 2003? (Include contract workers.)
- E
- a. Of these total workers, how many were seasonal/part-time (worked less than 150 days) during 2003? .....
- b. Of these total workers, how many were full-time (worked more than 150 days) during 2003? .....
6. What were the total gross wages paid for your nursery/greenhouse operation during 2003? (Include employer's cost for Social Security, workers compensation, insurance premiums, pension plans, and any other benefits provided.) .....

NUMBER
500
501
502

DOLLARS
510

## SECTION 5 - DESTINATION OF SALES

7. Please enter, by type of plant material, the percentage of 2003 gross sales from products shipped to the regions and States listed in the table below. The column for each type of plant material must add to 100 percent.

	DESTINATION OF SALES (as percent of gross sales)				
	BARE ROOT percent	BALLED AND BURLAPPED percent	CONTAINERS percent	GREENHOUSE percent	OTHER NURSERY percent
a. Oregon .....	331	361	391	421	451
b. Washington .....	332	362	392	422	452
c. California .....	333	363	393	423	453
d. Other Western States <sup>1/</sup> .....	334	364	394	424	454
e. Upper Midwest <sup>2/</sup> .....	335	365	395	425	455
f. Gulf States <sup>3/</sup> .....	336	366	396	426	456
g. Atlantic States <sup>4/</sup>	337	367	397	427	457
h. Northeast States <sup>5/</sup>	338	368	398	428	458
i. Western Canada <sup>6/</sup>	339	369	399	429	459
j. Eastern Canada <sup>6/</sup>	340	370	400	430	460
k. Foreign Countries: <sup>7/</sup>					
	—	—	—	—	—
	—	—	—	—	—
	—	—	—	—	—
	—	—	—	—	—
	—	—	—	—	—
	100%	100%	100%	100%	100%

<sup>1/</sup> Other Western States includes MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI.

<sup>2/</sup> Upper Midwest includes ND, SD, NE, KS, MN, IA, MO, WI, IL, MI, IN, OH, KY.

<sup>3/</sup> Gulf States includes OK, TX, AR, LA, TN, MS, AL..

<sup>4/</sup> Atlantic States includes MD, DE, WV, VA, NC, SC, GA ,FL.

<sup>5/</sup> Northeast States includes ME, NH, VT, MA, CT, RI, NY, PA, NJ.

<sup>6/</sup> Western Canada includes BC, AB, SK, MB    Eastern Canada includes all other provinces.

<sup>7/</sup> Foreign Countries should be listed separately.

## SECTION 6 - SURVEY RESULTS

8. 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

Prepared by: \_\_\_\_\_ Telephone: \_\_\_\_\_ Date: \_\_\_\_\_

**Thank You**

NURSERY COMMENTS:

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S  
A  
M

**PROPERTY SOLD, CHANGE IN OPERATOR, RETAIL SALES, LANDLORD?**

9. 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: \_\_\_\_\_

Retail sales of only.

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

New operation **L** with no 2003 sales.

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

Other [*Explain*] \_\_\_\_\_

Landlord

Prepared by: \_\_\_\_\_ Telephone: \_\_\_\_\_ Date: \_\_\_\_\_

**E**

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 30 minutes per response.

OFFICE USE
099
910
920