

OREGON NURSERY

and

GREENHOUSE

SURVEY

2002

2002

OREGON NURSERY

and

GREENHOUSE

SURVEY

Compiled and Published by

United States Department of Agriculture

Oregon Agricultural Statistics Service

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

Kent Hoddick, Agricultural Statistician
Chuck Bennett, Statistical Assistant

FOREWORD

September 2003

I am pleased to present the results of the 2002 Oregon Nursery and Greenhouse Survey. Thanks to the support of the State's nurseries, the Oregon Association of Nurseries, the Oregon Department of Agriculture, our field enumerator staff, and the U.S. Congress, this survey has provided a record of Oregon's leading industry for the past 12 years.

Oregon's nursery and greenhouse industry continues to rank #1 in the State's agriculture, with 2002 total gross value of sales coming in at \$727 million, up 7 percent from 2001. Nurseries with total gross value of sales between \$500,000 and \$2 million dollars showed the most growth, up 15 percent from the previous year, while sales were actually down slightly for two sales categories, the less than \$20,000 group and those reporting sales in the range of \$200,000-500,000. Almost half of the \$47 million sales growth in 2002 was in container sales, which continued its historical trend of dominating the product categories, accounting for 36 percent of the total sales. The number of operations climbed slightly in 2002, to 2,183, up from the previous year's 2,139. 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 four years. Prior to 1998, Clackamas and Marion counties vied for first place.

I hope that this report will continue to be a valued source of information on Oregon's nursery and greenhouse industry which produces the high quality products for which Oregon is so well-known.

Sincerely,

Janice A. Goodwin
State Statistician

TABLE OF CONTENTS

	Page
2002 Summary	1
Gross sales by plant material 1996-2002	1
Number of operations, acreage and gross sales by county 2000-2002	2
Gross sales by sales value 1998-2002	3
Data collection procedures	3
Number of operations and survey sampling by sales value 2001-2002	3
Number of workers and gross wages by sales value 2001	4
Number of workers, wages and number of operations 1995-2001	4
Destination of Oregon sales by plant material for 1991-1999	5-6
Number of operations by sales value 1996-2002	7
Gross Sales, yearly percent change, number of operations, number of firms with sales over \$2 million	7
Sample Questionnaire - 2002	8-9

2002 Oregon nursery sales set another record, for the 12th year.

Oregon's nursery and greenhouse industry continued its growth in 2002 by establishing yet another record high sales total of \$727 million, marking the twelfth straight year that record sales were recorded. Sales in 2002 rose 7 percent above 2001 and were 231 percent higher than in 1990. The industry further solidified its place atop all Oregon agricultural commodities by claiming the top ranking for the tenth consecutive year. Cattle, with a value of \$384 million, ranked second, while all hay and all grass seeds claimed third and fourth places with sales of \$358 million and \$278 million, respectively.

Forty-seven percent of the total \$47 million sales increase this year was in container sales. Balled and Burlaped products gained 10 percent while other product sales advanced 9 percent over last year. All categories of sales were higher in 2002 compared to 2001.

(continued on page 7)

Nursery/greenhouse gross sales: By plant material 1996 - 2002

Plant material	1996	1997	1998	1999	2000	2001	2002	<u>2002</u> <u>2001</u>
	<i>1,000 dollars</i>	<i>Percent change</i>						
Bare Root	97,600	105,400	109,700	116,300	136,700	145,100	147,500	102
B & B	75,000	77,800	85,500	97,500	127,700	129,100	142,100	110
Container	148,900	171,300	188,500	223,100	226,300	243,100	265,100	109
Greenhouse	91,800	95,800	105,900	103,100	106,600	114,700	120,100	105
Other	34,700	41,700	42,400	44,000	44,700	48,000	52,200	109
Total	448,000	492,000	532,000	584,000	642,000	680,000	727,000	107

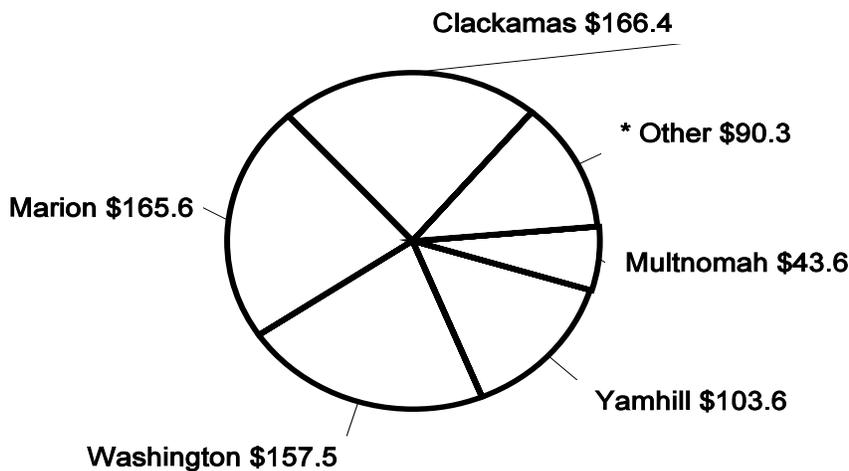
Number of operations, acreage, and gross sales by county, 2000 - 2002

	Number of operations	Acres	Gross sales			
	2002	2001 ^{1/}	2000	2001	2002	2002/2001
	<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	2,250	1,830	1,400	77
Clackamas	467	12,300	148,350	154,575	166,400	108
Curry	20	480	2,990	3,940	4,600	117
Deschutes	46	300	1,850	2,820	3,100	110
Douglas	61	550	4,690	5,040	3,200	63
Jackson	72	120	2,640	3,390	3,100	91
Josephine	55	130	3,010	2,480	2,400	97
Klamath	17	970	6,430	9,950	10,100	102
Lane	144	540	15,550	16,810	17,900	106
Lincoln	27	150	2,670	2,780	2,400	86
Linn	85	600	8,020	11,710	9,500	81
Marion	354	10,800	143,370	149,320	165,600	111
Multnomah	202	3,450	34,810	42,710	43,600	102
Polk	53	1,030	9,860	8,370	9,200	110
Umatilla	13	600	4,420	3,900	4,400	113
Washington	259	6,080	129,630	142,360	157,500	111
Yamhill	111	5,030	103,115	101,460	103,600	102
Other ^{2/}	153	1,755	18,345	16,555	19,000	115
Total	2183	45,200	642,000	680,000	727,000	107

1/ Not collected for 2002.

2/ 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 - 2002
Oregon - \$727 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.

Gross sales, by sales value, 1998 - 2002

Sales size group	Gross sales					
	1998	1999	2000	2001	2002	<u>2002</u> 2001
	<i>1,000 dollars</i>	<i>Percent change</i>				
Less than \$20,000	7,600	7,200	8,800	6,300	6,100	97
\$20,000 - \$99,999	17,500	15,000	15,800	16,100	18,000	112
\$100,000 - \$199,999	19,600	17,600	14,600	14,000	15,300	109
\$200,000 - \$499,999	44,700	38,500	37,900	44,400	41,600	94
\$500,000 - \$1,999,999	135,900	125,500	130,200	130,500	149,500	115
More than \$2,000,000	306,700	380,200	434,700	468,700	496,500	106
Total	532,000	584,000	642,000	680,000	727,000	107

Data collection

The 2002 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 2002. 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 July 8, 2003, followed by a second request on July 22. All non-respondents were phoned or visited from August 18 to August 28. Cooperation was excellent with 96 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 2001 & 2002

Sales size group	Number of operations		Operations in sample	
	2001	2002	2001	2002
Less than \$20,000	1,337	1,375	137	120
\$20,000 - \$99,999	362	353	122	124
\$100,000 - \$199,999	98	106	98	106
\$200,000 - \$499,999	138	136	138	136
\$500,000 - \$1,999,999	134	142	134	142
More than \$2,000,000	70	71	70	71
Total	2,139	2,183	699	699

2001 payrolls showed sharp increase ^{1/}

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

^{1/} Data not collected for 2002, the number of workers and wages are collected every other year.

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

	1995	1997	1999	2001	<u>2001</u> <u>1999</u>
	<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

Destination of gross sales by Oregon plant material, 1991, 1995, 1999^{8/}

Destination	Plant material type								
	Bare root			B & B			Container		
	1991	1995	1999	1991	1995	1999	1991	1995	1999
	<i>1,000</i>	<i>1,000</i>	<i>1,000</i>	<i>1,000</i>	<i>1,000</i>	<i>1,000</i>	<i>1,000</i>	<i>1,000</i>	<i>1,000</i>
	<i>dollars</i>	<i>dollars</i>	<i>dollars</i>	<i>dollars</i>	<i>dollars</i>	<i>dollars</i>	<i>dollars</i>	<i>dollars</i>	<i>dollars</i>
Oregon	20,040	19,420	20,610	11,530	15,690	18,560	19,790	30,240	42,280
Washington	11,740	8,185	8,480	9,390	8,850	9,850	13,880	15,090	25,860
California	5,150	4,625	6,390	3,070	2,346	4,060	5,740	8,150	16,900
Other western States ^{1/}	4,460	3,225	4,670	6,780	8,085	8,560	11,520	13,080	25,510
Upper Midwest ^{2/}	22,390	20,130	21,560	7,150	9,490	15,160	21,590	31,620	36,060
Gulf States ^{3/}	3,850	4,800	4,690	830	1,315	2,680	2,990	3,660	6,450
Atlantic States ^{4/}	5,740	9,375	24,400	5,070	5,937	12,860	8,690	11,300	30,950
Northeast States ^{5/}	13,050	9,345	21,050	8,610	13,450	21,900	14,670	24,110	33,160
Western Canada ^{6/}	2,540	2,070	2,770	2,190	1,654	1,750	4,940	6,260	3,210
Eastern Canada ^{7/}	4,250	845	1,220	2,260	760	2,120	2,700	4,260	2,440
Foreign Countries	20	880	460	30	223	--	60	330	280
Total	93,230	82,900	116,300	56,910	67,800	97,500	106,570	148,100	223,100

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, 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, 1991, 1995, 1999 ^{8/} (continued)

Destination	Plant material type									<u>1999</u> 1995	Percent of total sales by destination
	Greenhouse			Other			Total				
	1991	1995	1999	1991	1995	1999	1991	1995	1999		
	<i>1,000</i> <i>dollars</i>	<i>Percent</i>	<i>Percent</i>								
Oregon	35,060	47,415	60,680	5,840	13,670	17,450	92,260	126,435	159,580	126	27.3
Washington	7,810	11,275	14,920	2,750	4,010	2,320	45,570	47,410	61,430	130	10.5
California	5,430	10,160	9,700	3,310	5,630	9,670	22,700	30,911	46,720	151	8.0
Other western States ^{1/}	1,720	1,710	2,150	980	1,140	1,030	25,460	27,240	41,920	154	7.2
Upper Midwest ^{2/}	2,780	4,325	3,680	4,790	3,350	2,810	58,700	68,915	79,270	115	13.6
Gulf States ^{3/}	1,310	1,600	2,030	1,430	1,900	1,890	10,410	13,275	17,740	134	3.1
Atlantic States ^{4/}	1,120	1,475	3,260	2,500	4,020	2,750	23,120	32,107	74,220	231	12.7
Northeast States ^{5/}	1,000	2,150	3,350	3,270	2,320	2,290	40,600	51,375	81,750	159	14.0
Western Canada ^{6/}	1,060	2,015	2,060	280	450	360	11,010	12,449	10,150	82	1.7
Eastern Canada ^{7/}	810	1,025	1,090	230	180	690	10,250	7,070	7,560	107	1.3
Other Foreign Countries	70	350	180	740	30	2,740	920	1,813	3,660	202	.6
Total	58,170	83,500	103,100	26,120	36,700	44,000	341,000	419,000	584,000	139	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, 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.

(continued from page 1)

Production appears to be shifting somewhat to Washington and Polk Counties as their sales were up 10 percent from 2001. The top four counties accounted for 82 percent of all production, the same as last year. The number of firms growing nursery and greenhouse products in Oregon during 2002 was 2,183, which compares with 2,139 firms in 2001. A review of sales by the size of firms shows that the smallest firms (annual sales under \$20,000) and the firms with sales between \$200,000 - 500,000 had lower sales than in 2001. Conversely, firms with annual sales of between \$20,000 and \$200,000 had higher sales from 2001. The greatest increase in sales came from the large firms between \$500,000 and 2 million which showed a 15 percent increase. The largest firms (sales over \$2 million) increased 6 percent from last year, or \$27.8 million dollars.

Number of operations by sales value, 1996 - 2002

Sales size group	Number of Operations						
	1996	1997	1998	1999	2000	2001	2002
Less than \$20,000	1,258	1,292	1,342	1,396	1,324	1,337	1,375
\$20,000 - \$99,999	324	341	337	356	343	362	353
\$100,000 - \$199,999	125	131	129	121	103	98	106
\$200,000 - \$499,999	113	111	113	116	126	138	136
\$500,000 - \$1,999,999	122	125	118	135	137	134	142
More than \$2,000,000	41	40	43	62	69	70	71
Total	1,983	2,040	2,082	2,185	2,102	2,139	2,183

Gross Sales 1990-2002, Yearly Percent Change, Operations 1991-2002, Firms with sales over \$2 million 1994-2002

Year	Gross Sales <i>1,000 dollars</i>	% 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

1/ Not Available