

**OREGON NURSERY**

**and**

**GREENHOUSE**

**SURVEY**

**1995**

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GREENHOUSE

SURVEY

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# FOREWORD

September 1996

Following are the results of the fifth Nursery and Greenhouse Survey for Oregon. The survey is funded by USDA National Agricultural Statistics Service due largely to the efforts of the Oregon Association of Nurserymen which secured funding through the Oregon Congressional delegation. This year's survey completes a five-year cycle of surveys, with four "shorter" version questionnaires followed by this year's fifth and more extensive questionnaire. Beginning next year, the shorter version will again be used.

The survey is designed to provide basic information on the Nursery industry, and the results show that not only is it the leading agricultural industry in Oregon, but has agriculture largest payroll for hired labor. Gross sales of nursery products totaled \$419 million in 1995, increasing nearly 9 percent above a year earlier and solidifying the number one ranking first attained in 1994. Information of this nature is valuable in the continuing dialog concerning sensitive issues such as immigration legislation, and land use, to mention just two. Based on its number one ranking in Oregon agriculture, the nursery industry can certainly claim an authoritative voice in debating agricultural policy at local, state and national levels. Universities, government planners at all levels, state and federal legislatures, input suppliers, and producers and marketers of nursery products make up the bulk of data users.

This survey would not have been completed without the efforts of the Oregon Association of Nurserymen, Oregon Department of Agriculture and the Oregon Agricultural Statistics Service enumerator staff. We are very appreciative of their support in data collection and publication of this report.

Sincerely,

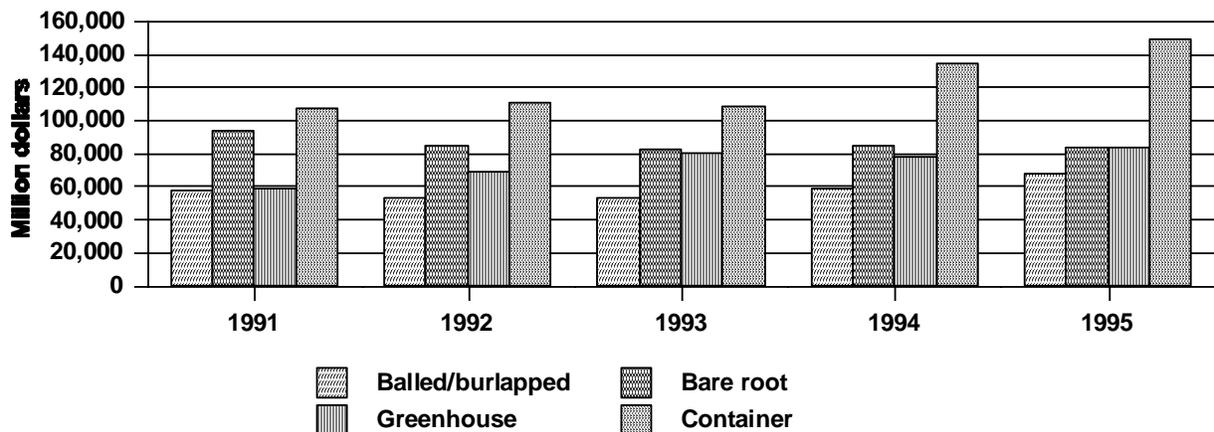
Homer K. Rowley  
State Statistician

## TABLE OF CONTENTS

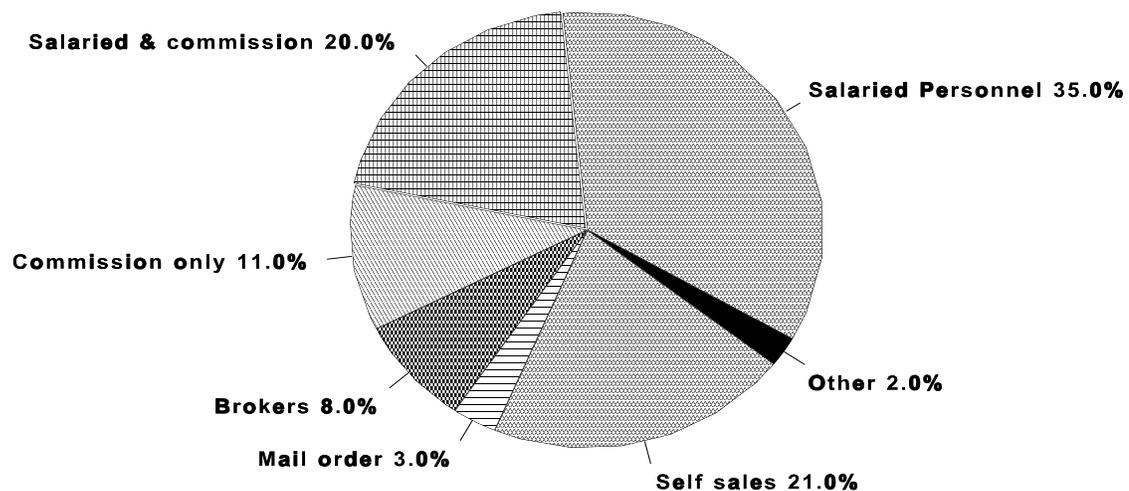
	Page
1995 Summary .....	1
Gross sales by plant material .....	1
Acreage by plant material .....	2
Gross sales by sales value .....	2
Gross wages paid by sales value.....	3
Number of workers by sales value .....	3
Marketing methods by sales value.....	3
Number of operations, acreage and gross sales by county .....	4-5
Destination of sales by plant material.....	6-7
Nursery/Greenhouse summary recap .....	8
Data collection procedures .....	8
Number of operations and survey sampling by sales value .....	8
Sample Questionnaire .....	9-12

## Nursery/greenhouse sales by plant material, Oregon - 1991-1995

Total sales: 1991-\$341m., 1992-\$345m., 1993-\$347m., 1994-\$385m. & 1995-\$419m.



## Nursery/greenhouse marketing methods by percent, Oregon - 1995



## 1995 Nursery sales set another record!

Oregon's 1995 nursery sales, at \$419 million is the highest nursery sales value ever estimated. Sales were nine percent more than last year and 33 percent more than 1990, the first year for this survey. This was the **fifth** consecutive year of increased value of sales and the **second** year that nursery products were the leading agricultural commodity group in Oregon. The \$419 million gross sales far exceed the second leading commodity, wheat, which generated \$306 million. Hay and cattle were ranked third and fourth at \$304 and \$295 million, respectively.

The \$34 million sale's gain over 1994 was mostly due to the \$14 million increase in container value (11 percent) and the \$9 million increase for balled and burlapped value (16 percent). Also showing strong gains were greenhouse value, up eight percent, and other materials value, up 18 percent. The only area of decreased sales was bare root value which was off two percent.

Marion County, with sales of \$97.9 million, became the leading county of sales this year for the first time. However, Clackamas County, with sales of \$95.3

million was a very close second. Washington County, the third highest at \$81.4 million, decreased two percent from last year. Yamhill ranked fourth and Multnomah claimed the fifth spot. The top three counties accounted for nearly two-thirds of the State's sales value and the top five counties accounted for 85 percent of all value in the State. All of the five leading counties are located in the northern Willamette Valley. Despite the record sales, the number of firms growing nursery products in the five leading counties totaled 1,277, a drop of 58 from 1994. However, acreage in production increased by six percent to 30,600 acres. Square footage of greenhouse space was estimated to be 22,480,000 square feet.

Nearly all of the gain in sales value came from firms grossing at least \$200 thousand in sales. Gross sales of firms between \$200 thousand and \$500 thousand rose 15 percent, sales of firms between \$500 thousand and \$2 million rose 14 percent, and sales of firms above \$2 million rose 9 percent. The total number of firms raising nursery products in Oregon remained fairly constant over the past three years averaging around 1,956 firms.

(Continued page 2)

### Nursery/greenhouse gross sales by plant material 1990 - 1995

Plant material	Gross sales						
	1990	1991	1992	1993	1994	1995	<u>1995</u> 1994
	<i>1,000 dollars</i>	<i>Percent</i>					
Bare Root	93,240	93,230	84,500	82,400	84,300	82,900	98
B & B	53,400	56,910	53,000	52,200	58,500	67,800	116
Container	92,860	106,570	109,800	108,400	133,900	148,100	111
Greenhouse	52,500	58,170	68,400	79,800	77,200	83,500	108
Other	23,000	26,120	29,300	24,200	31,100	36,700	118
Total	315,000	341,000	345,000	347,000	385,000	419,000	109

(Continued from page 1)

### Wages increase

For 1995, the State's nurseries and greenhouses paid out \$146.5 million in wages to the 19,485 workers employed. This was an increase in wages paid of 18 percent from 1993 and 28 percent from 1991. The average wages paid per worker last year were \$7,518 up \$1,051 from 1993. The total number of workers employed remained constant since 1991 but the number of full time workers increased by 1,000 workers while the seasonal number decreased by the same amount. Labor was the major operating cost for the industry but only about four percent of labor costs were paid out to labor contractors.

### Destinations

Oregon grown products were shipped all over the United States, Canada, and the world. In fact, 70 percent of production was shipped out of Oregon with the upper Midwest receiving the largest share. About 24 percent of the shipments go to the upper Midwest, 18 percent to the Northeast States and 16 percent to Washington State. Eleven percent are shipped to the Atlantic States and eleven percent goes to California. Plant material was shipped to fifteen different foreign countries; Germany was mentioned four times while England was mentioned three times. The largest value of plant material exported was to Mexico. About ten percent of the sales value, was from sales to other Oregon nurseries and greenhouses for additional growth and development.

### Acreage by plant material 1991, 1993, 1995

Plant material	1991	1993	1995	<u>1995</u> <u>1993</u>
	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Percent</i>
Bare Root	8,800	9,500	10,600	112
B & B	10,070	11,400	10,800	95
Container	3,490	3,900	4,400	113
Greenhouse	*550	*550	600	109
Other	3,210	4,000	5,100	128
Other acreage in operation	*5,610	4,350	4,400	101
Total	31,730	33,700	35,900	107

\* Revised

### Gross sales, by sales value, 1991 - 1995

Sales size group	Gross sales					<u>1995</u> <u>1994</u>
	1991	1992	1993	1994	1995	<i>Percent</i>
	<i>1,000 dollars</i>					
Less than \$20,000	1/	1/	1/	8,850	10,000	113
\$20,000 - \$99,999	38,020	35,900	27,300	20,450	18,800	92
\$100,000 - \$199,999	1/	1/	1/	23,800	22,000	92
\$200,000 - \$499,999	49,500	53,100	57,400	40,600	46,800	115
\$500,000 - \$1,999,999	1/	1/	1/	95,900	109,000	114
More than \$2,000,000	253,480	256,000	262,300	195,400	212,400	109
Total	341,000	345,000	347,000	385,000	419,000	109

1/ For 1991-1993 these strata not available. Included in next higher stratum.

## Number of workers employed in the nursery/greenhouse industry and gross wages paid - 1995

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	140	1,590	1,730	2,475,000	1,431
\$20,000 - \$99,999	300	1,190	1,490	4,664,000	3,130
\$100,000 - \$199,999	350	1,080	1,430	5,902,000	4,128
\$200,000 - \$499,999	700	1,625	2,325	15,163,000	6,522
\$500,000 - \$1,999,999	1,780	2,725	4,505	38,900,000	8,635
More than \$2,000,000	3,980	4,025	8,005	79,378,000	9,916
Total	7,250	12,235	19,485	146,482,000	7,518

## Number of workers, wages and number of operations 1991 - 1995

	1991	1993	1995	$\frac{1995}{1991}$	$\frac{1995}{1993}$
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Percent</i>	<i>Percent</i>
Seasonal workers	13,114	12,350	12,235	93	99
Full time workers	6,219	6,850	7,250	117	106
Total workers	19,333	19,200	19,485	101	101
Total wages (\$)	114,767,000	124,173,000	146,482,000	128	118
Average wages per worker (\$)	5,936	6,467	7,518	127	116
Number of operations	1,704	1,986	1,905	112	96

## Marketing methods - 1995

Sales size group	Salaried personnel	Salaried & Commission	Commission Only	Brokers	Mail Order	Self Sales	Other
	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>
Less than \$20,000	16	2	1	3	3	70	5
\$20,000 - \$99,999	11	1	1	6	5	74	2
\$100,000 - \$199,999	10	8	3	6	4	66	3
\$200,000 - \$499,999	24	3	9	10	5	43	6
\$500,000 - \$1,999,999	50	7	10	6	2	24	1
More than \$2,000,000	33	35	14	9	2	4	3
Average	35	20	11	8	3	21	2
Total number reporting using each method <sup>1/</sup>	143	27	69	116	60	539	48

<sup>1/</sup> Each report could have reported more than one method.

## Number of operations, acreage and gross sales by county, 1993 - 1995

County	Number of operations	Acres	Gross Sales			
	1995	1995	1993	1994	1995	1995/1994
	<i>Number</i>	<i>Acres</i>	<i>Dollars</i> <i>Dollars</i>		<i>Dollars</i>	<i>Percent</i>
Benton	50	400	1,900	1,100	1,400	127
Clackamas	439	11,000	81,400	86,300	95,300	110
Curry	23	520	2,400	3,300	3,600	109
Deschutes	23	140	230	1,200	1,100	92
Douglas	48	400	5,100	4,600	5,300	115
Jackson	55	120	2,200	2,100	2,100	100
Josephine	44	140	2,100	2,500	2,100	84
Klamath	8	350	3,000	3,600	3,800	106
Lane	127	510	10,000	10,200	11,500	113
Lincoln	18	170	2,800	2,400	3,100	129
Linn	70	250	3,600	3,900	4,800	123
Marion	309	7,200	69,000	82,200	97,900	119
Multnomah	209	3,100	22,300	26,900	24,900	93
Polk	28	900	3,400	4,900	6,100	124
Umatilla	16	670	3,050	4,500	4,800	107
Washington	242	4,900	76,200	83,200	81,400	98
Yamhill	78	4,400	51,800	56,500	57,300	101
Other <sup>1/</sup>	118	730	6,520	5,600	12,500	223
<b>Total</b>	<b>1,905</b>	<b>35,900</b>	<b>347,000</b>	<b>385,000</b>	<b>419,000</b>	<b>109</b>

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