

**OREGON NURSERY**

**and**

**GREENHOUSE**

**SURVEY**

**1996**

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SURVEY

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# FOREWORD

September 1997

This publication contains the results of the sixth Nursery and Greenhouse Survey for Oregon. Funding for the survey is provided by USDA's National Agricultural Statistics Service and was made possible, in large part, by the Oregon Association of Nurserymen's efforts to secure funding through the Oregon Congressional delegation. This year marks the beginning of the second "five-year" survey cycle, whereby a different length questionnaire is used each year. The shorter version questionnaire used this year focused on sales and county of production. Next year's questionnaire will be more comprehensive.

The industry's growth trend continued higher for 1996 as survey results show that sales of \$448 million again set a record high. The seven percent gain over 1995 follows on the heels of a 9 percent advance a year ago. The record high sales of 1996 solidifies the nursery industry's number one ranking in Oregon agriculture. The clout associated with this ranking entitles the nursery and related industries major input in the important issues facing the Oregon agricultural community including water use, labor and immigration issues, and land use. In addition to the industry, major data users are Universities, government planners at all levels, state and federal legislatures, input suppliers and producers and marketers of nursery products.

This survey could not be completed successfully without the efforts and support of the Oregon Association of Nurserymen, Oregon Department of Agriculture, and the enumerator staff of the Oregon Agricultural Statistics Service. We are very appreciative of their efforts in data collection and publication.

Sincerely,

Homer K. Rowley  
State Statistician

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## Nursery sales record falls again

Oregon's nursery and greenhouse sales totaled a record high \$448 million in 1996, the sixth consecutive year that a record high was established. Sales were seven percent more than 1995 and 42 percent more than 1990, the first year for the survey. This marks the third year that nursery products were the leading agricultural commodity group in Oregon. The \$448 million gross sales far exceed the second leading commodity, hay, which generated \$303 million. Wheat and cattle were ranked third and fourth at \$274 and \$252 million, respectively.

The \$29 million value of sale's gain over 1995 was mostly due to a \$14.7 million increase in bare root sales.

Also showing strong gains were balled and burlapped products which advanced 11 percent and greenhouse sales, a 10 percent gain over the previous year. The only product group coming in lower in 1996 was the "other" category, which dropped 5 percent.

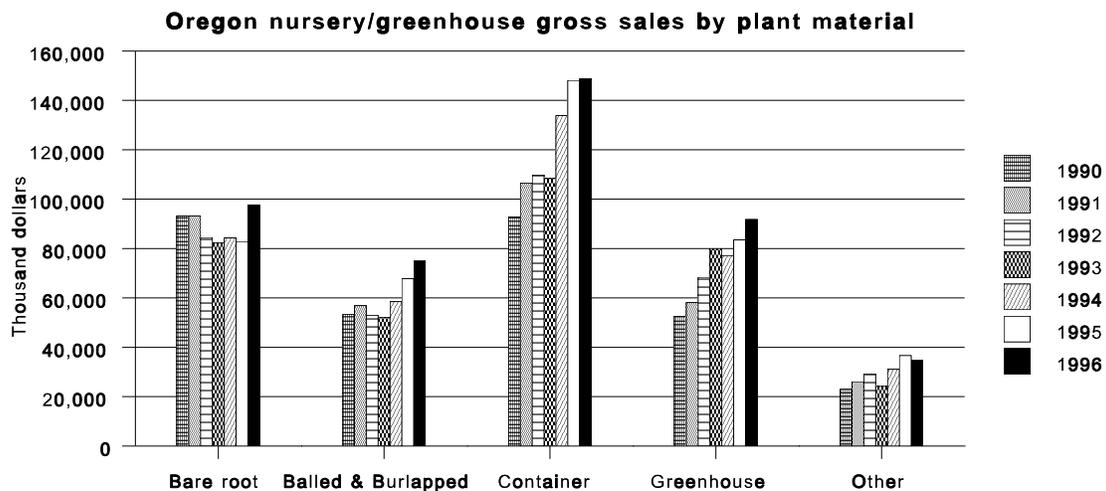
## Clackamas County regains the lead

Clackamas County reclaimed the title of leading nursery county from Marion County which took the lead for the first time last year. Clackamas sales totaled \$103.5 million while Marion County had sales of \$98.3 million. Washington County was third with sales of \$86.6 million and Yamhill County claimed fourth, weighing in with sales of \$71.6 million. In fifth place was Multnomah County with sales of \$32.4 million. The top three counties account for nearly two thirds of the state's sales while the five leading counties account for 88 percent. There were 1,317 firms producing nursery and greenhouse products in the top 5 counties which was about the same number of firms as last year.

All the gain in sales value came from firms grossing at least \$500 thousand or more in sales value. Firms with sales between \$500 thousand and \$2 million gained 11 percent while firms grossing over \$2 million were 16 percent higher. Statewide, there were 1,983 operations producing nursery and greenhouse products.

### Nursery/greenhouse gross sales by plant material 1990 - 1996

Plant material	Gross sales							<u>1996</u> 1995
	1990	1991	1992	1993	1994	1995	1996	
	<i>1,000 dollars</i>	<i>Percent</i>						
Bare Root	93,240	93,230	84,500	82,400	84,300	82,900	97,600	118
B & B	53,400	56,910	53,000	52,200	58,500	67,800	75,000	111
Container	92,860	106,570	109,800	108,400	133,900	148,100	148,900	101
Greenhouse	52,500	58,170	68,400	79,800	77,200	83,500	91,800	110
Other	23,000	26,120	29,300	24,200	31,100	36,700	34,700	95
Total	315,000	341,000	345,000	347,000	385,000	419,000	448,000	107



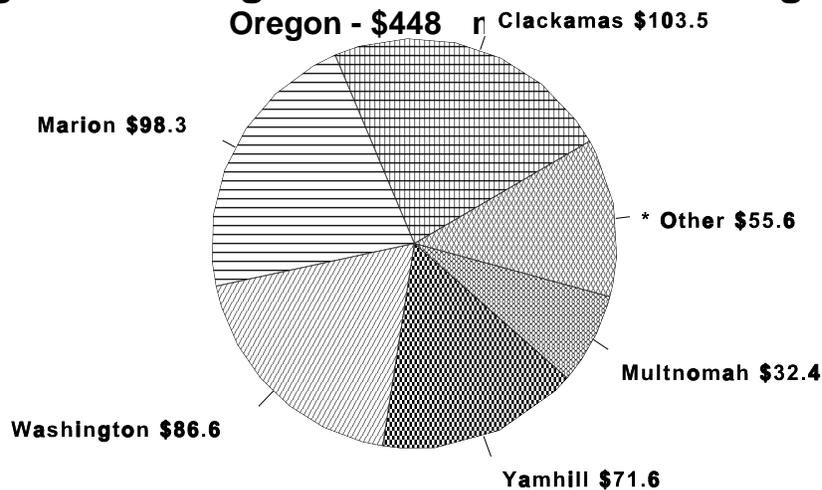
## Number of operations, acreage and gross sales by county, 1994 - 1996

County	Number of operations	Acres <sup>1</sup>	Gross Sales			
	1996	1995	1994	1995	1996	1996/1995
	<i>Number</i>	<i>Acres</i>	<i>Million Dollars Dollars</i>	<i>Million</i>	<i>Million Dollars</i>	<i>Percent</i>
Benton	46	400	1,100	1,400	1,700	121
Clackamas	448	11,000	86,300	95,300	103,500	109
Curry	23	520	3,300	3,600	2,700	75
Deschutes	26	140	1,200	1,100	1,600	145
Douglas	52	400	4,600	5,300	5,200	98
Jackson	60	120	2,100	2,100	1,800	86
Josephine	44	140	2,500	2,100	2,200	105
Klamath	7	350	3,600	3,800	3,700	97
Lane	139	510	10,200	11,500	12,000	104
Lincoln	21	170	2,400	3,100	2,800	90
Linn	71	250	3,900	4,800	5,100	106
Marion	318	7,200	82,200	97,900	98,300	100
Multnomah	215	3,100	26,900	24,900	32,400	130
Polk	36	900	4,900	6,100	6,500	107
Umatilla	14	670	4,500	4,800	3,600	75
Washington	257	4,900	83,200	81,400	86,600	106
Yamhill	79	4,400	56,500	57,300	71,600	125
Other <sup>2</sup>	127	730	5,600	12,500	6,700	54
<b>Total</b>	<b>1,983</b>	<b>35,900</b>	<b>385,000</b>	<b>419,000</b>	<b>448,000</b>	<b>107</b>

<sup>1</sup> Not Collected for 1996.

<sup>2</sup> Contains counties with less than 1 million dollars of sales or counties which were combined to avoid disclosure.

## Nursery/greenhouse gross sales by county, Oregon - 1996



\* Lane \$12.0, Polk \$6.5, Douglas \$5.2, Linn \$5.1, Klamath \$3.7, Umatilla \$3.6, Lincoln \$2.8, Curry \$2.7, Other \$14.0

### Gross sales, by sales value, 1992 - 1996

Sales size group	Gross sales					
	1992	1993	1994	1995	1996	<u>1996</u> 1995
	<i>1,000 dollars</i>	<i>Percent</i>				
Less than \$20,000	1	1	8,850	10,000	6,700	67
\$20,000 - \$99,999	35,900	27,300	20,450	18,800	18,100	96
\$100,000 - \$199,999	1	1	23,800	22,000	18,900	86
\$200,000 - \$499,999	53,100	57,400	40,600	46,800	36,000	77
\$500,000 - \$1,999,999	1	1	95,900	109,000	121,500	111
More than \$2,000,000	256,000	262,300	195,400	212,400	246,800	116
Total	345,000	347,000	385,000	419,000	448,000	107

<sup>†</sup> For 1992-1993 these strata not available. Included in next higher stratum.

### 1996 Data Collection

The 1996 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 762 names was chosen from the State of Oregon's list of licensed nurseries and greenhouses for 1996. 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 24, 1997, followed by a second request on July 9, 1997. All non-respondents were phoned or visited from July 24 to August 9. Cooperation was excellent with 92 percent of the sampled names cooperating.

The sample design was developed by the National Agricultural Statistics Service. Computer editing and summary programs were written by Rich Gerdes of the Oregon Staff. Data for minor counties and items were combined with other totals to avoid disclosure of individual operations.

### Number of operations and survey sampling 1995 & 1996

Sales size group	Number of operations		Operations in sample	
	1995	1996	1995	1996
Less than \$20,000	1,186	1,258	248	193
\$20,000 - \$99,999	344	324	246	168
\$100,000 - \$199,999	118	125	118	125
\$200,000 - \$499,999	117	113	117	113
\$500,000 - \$1,999,999	102	122	102	122
More than \$2,000,000	38	41	38	41
Total	1,905	1,983	869	762