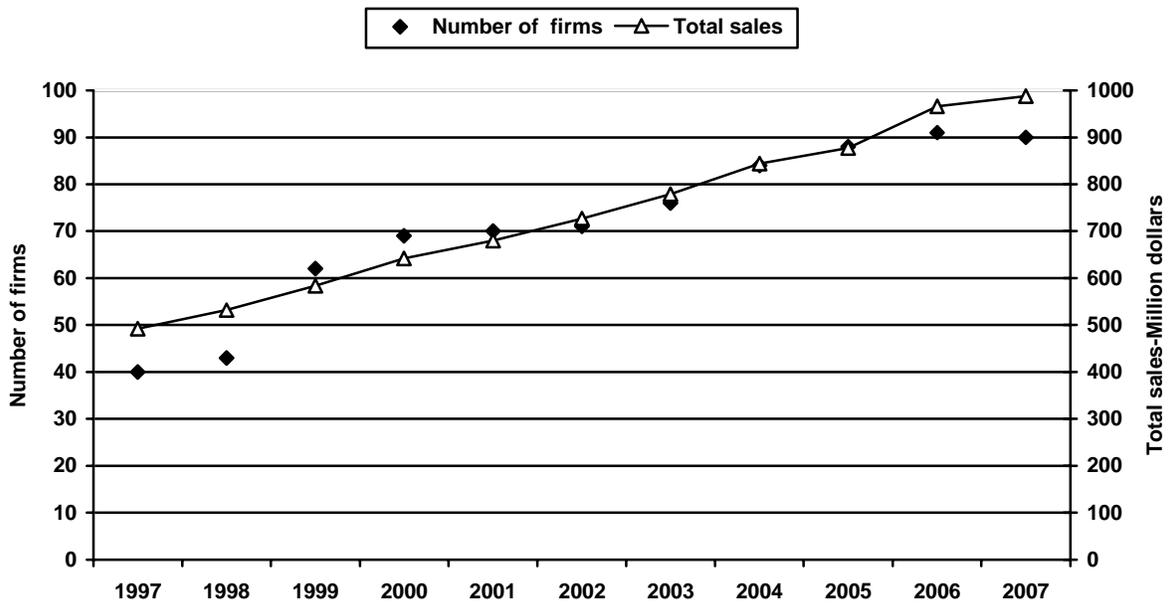


Oregon Nursery and Greenhouse Survey 2007

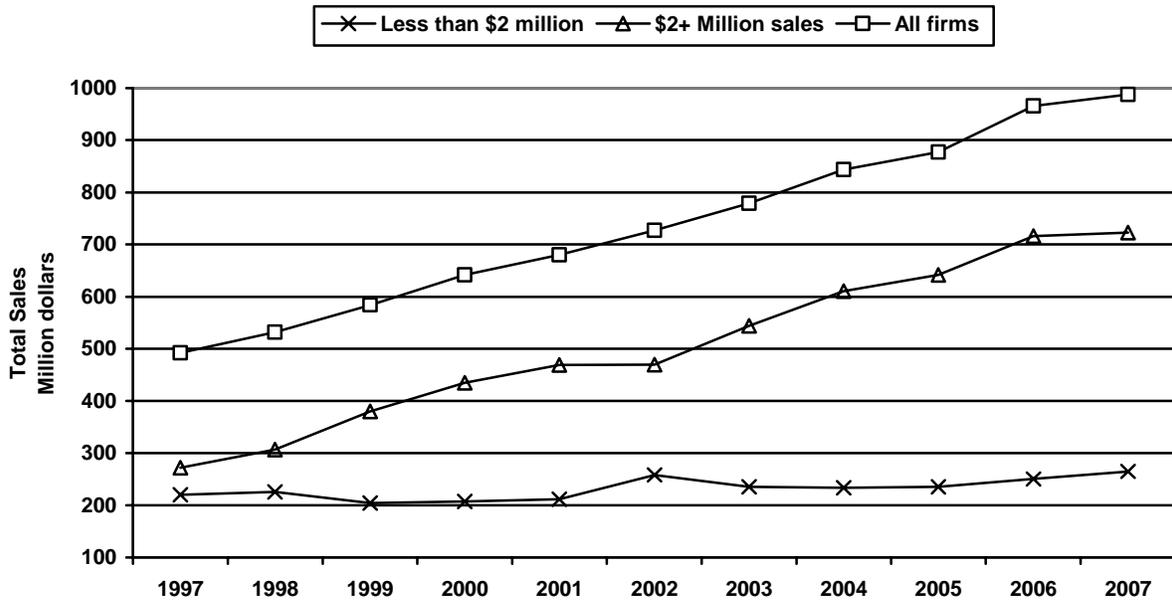


USDA-NASS Oregon Field Office

Number of firms with \$2+ million in sales,
and total sales, Oregon, 1997-2007



Gross sales of firms with above and below \$2 million in sales,
and total sales, Oregon, 1997-2007



2007

Oregon Nursery and Greenhouse Survey

Compiled and Published by

Oregon Field Office

National Agricultural Statistics Service

United States Department of Agriculture

Christopher A. Mertz, *Director*
Bruce A. Eklund, *Deputy Director*

Copies of this publication are available at no charge by contacting the Oregon office at 1220 SW Third Ave., Room 1735, Portland, OR 97204-2899, (503) 326-2131, by sending a request via E-mail to: nass-or@nass.usda.gov, or by accessing the Internet at www.nass.usda.gov/or.

FOREWARD

September 2008

I am pleased to present the results of the *2007 Oregon Nursery and Greenhouse Survey*. Thanks to the support of the many Oregon nurseries and greenhouses, the Oregon Association of Nurseries, the Oregon Department of Agriculture, our crew of field and phone interviewers, as well as others who provide information and support for this important annual effort. The results represent the eighteenth year of documenting through statistics the progress of Oregon's # 1 agricultural industry.

Oregon's nursery and greenhouse industry continues to rank #1 in the State's agriculture, with 2007 total gross value of sales coming in at \$988 million, up 2 percent from 2006. Nurseries with total gross value of sales between \$100,000 and \$199,000 dollars and those with sales less than \$20,000 showed the most growth, both up over 60 percent from the previous year. Container sales continue to dominate the product categories, accounting for 48 percent of the sales for all product types; this category is up 11 percent from 2006. The estimated number of operations remained steady in 2007, staying at 2,100 operations. The top five counties in terms of gross sales were Marion, Washington, Clackamas, Yamhill, and Multnomah. These counties are all in or near the Portland metropolitan area and represent 86 percent of the total value of nursery and greenhouse production for Oregon.

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,



Christopher A. Mertz
Director

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2007 Oregon nursery industry approaches one billion in sales.

Oregon's horticultural industries continued to grow in 2007 with sales of \$988 million for nursery and greenhouse products. Sales again set a new record high, however the pace did slow. Sales in 2007 increased 2 percent from the previous year, compared to a 10 percent annual increase from 2005 to 2006. The total number of operations in the state remained at 2,100, the same as 2006. The industry employed 21,000 workers and paid \$345 million in wages during 2007. Products were marketed throughout the US and other countries with approximately 75 percent of total sales occurring outside of Oregon.

(continued on page 3)

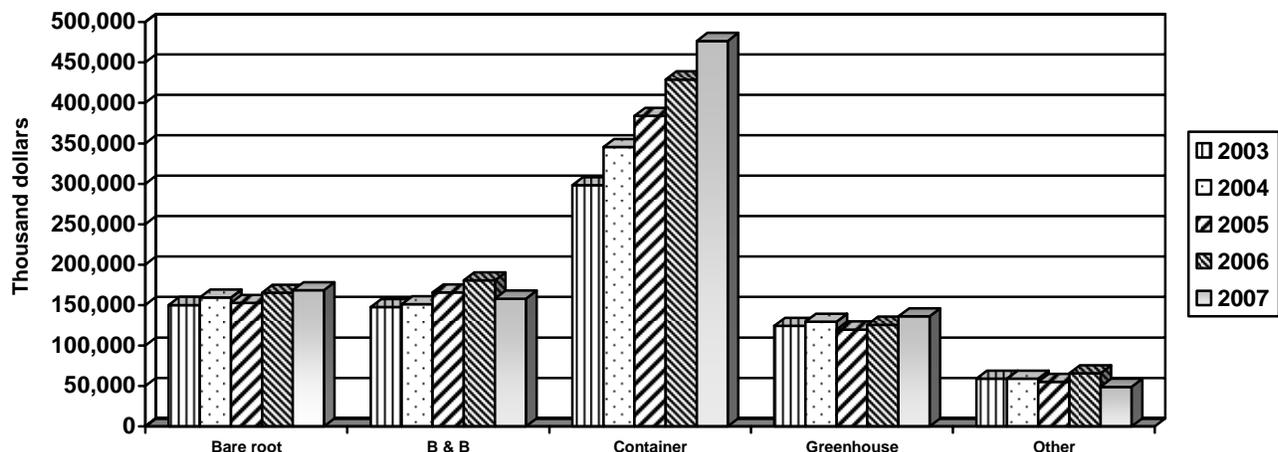
Nursery and greenhouse: Gross sales by plant material, Oregon, 2001-2007

Plant material	2001	2002	2003	2004	2005	2006	2007	2007/2006
	<i>1,000 dollars</i>	<i>Percent</i>						
Bare root	145,100	147,500	150,100	159,400	152,700	165,200	168,300	102
B & B	129,100	142,100	147,400	151,000	165,600	180,500	157,900	87
Container	243,100	265,100	298,300	345,300	384,000	429,000	476,700	111
Greenhouse	114,700	120,100	124,300	129,400	119,700	125,700	136,200	108
Other	48,000	52,200	58,900	58,900	55,000	65,600	48,900	75
Total	680,000	727,000	779,000	844,000	877,000	966,000	988,000	102

Nursery and greenhouse: Gross sales by sales size group, Oregon, 2003-2007

Sales size group	Gross sales					2007/2006
	2003	2004	2005	2006	2007	
	<i>1,000 dollars</i>	<i>Percent</i>				
Less than \$20,000	6,400	7,700	5,900	6,100	10,000	164
\$20,000-\$99,999	18,100	18,900	21,600	21,000	23,000	110
\$100,000-\$199,999	15,900	16,700	13,200	11,800	20,000	169
\$200,000-\$499,999	45,200	45,100	43,500	44,600	42,000	94
\$500,000-\$1,999,999	149,400	144,300	150,900	167,000	170,000	102
More than \$2,000,000	544,000	611,300	641,900	715,500	723,000	101
Total	779,000	844,000	877,000	966,000	988,000	102

Nursery and greenhouse: Gross sales by plant material, Oregon, 2003-2007

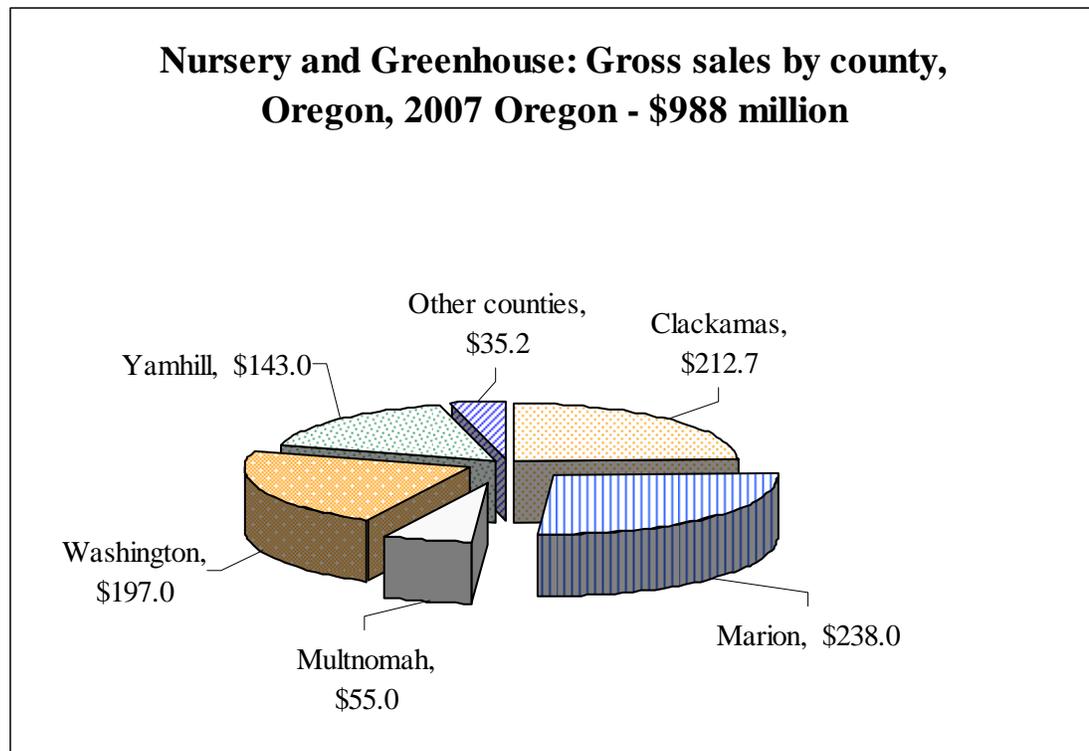


Nursery and greenhouse: Operations, acreage, and gross sales, by county, Oregon, 2005-2007

County	Number of operations	Acres	Gross sales			
	2007	2007	2005	2006	2007	2007 / 2006
	<i>Operations</i>	<i>Acres</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Clackamas	530	13,300	206,500	212,500	212,700	100
Curry	20	250	3,700	4,200	3,625	86
Deschutes	40	300	3,800	4,600	4,700	102
Douglas	50	600	3,900	3,900	4,500	115
Jackson	70	125	3,300	3,700	3,500	95
Josephine	50	200	2,800	2,800	3,600	129
Klamath	20	1,700	17,500	20,900	17,500	84
Lane	150	850	24,500	24,500	33,000	135
Linn	80	800	15,300	16,900	18,200	108
Marion	350	15,000	194,800	230,900	238,000	103
Multnomah	170	5,000	46,600	47,000	55,000	117
Polk	50	1,500	9,700	9,700	10,500	108
Umatilla	20	600	8,000	9,600	8,000	83
Washington	250	7,000	193,300	212,600	197,000	93
Yamhill	110	5,500	110,100	125,700	143,000	114
Other counties ¹	140	975	33,200	36,500	35,175	96
Oregon	2,100	53,700	877,000	966,000	988,000	102
Top five counties ²	1,410	45,800	751,300	828,700	845,700	102

¹ Contains counties with less than two million dollars of sales and counties that were combined to avoid disclosure of individual operations.

² Top five counties include: Clackamas, Marion, Multnomah, Washington, and Yamhill.



(continued from page 1)

Nursery and greenhouse sales continued to be the leading agricultural industry in the state. Overall, the value of nursery sales increased \$22 million from last year. Container, bare root, and greenhouse sales all increased, whereas balled and burlapped and other nursery product sales both decreased from 2006. Container sales increased \$47.7 million, 11 percent above 2006. Greenhouse sales increased 8 percent, and bare root product sales rose 2 percent. Balled and burlapped product sales decreased 13 percent and all other nursery products dropped to 75 percent of the 2006 total.

Firms with sales of over \$2 million comprised 73 percent of the total sales and accounted for just over half of the acreage in the state. Smaller firms, with \$20,000 or less in sales, accounted for over half of the total operations in the state with sales in this category growing to \$10 million in 2007.

Oregon's top five counties of production, Marion, Clackamas, Washington, Yamhill, and Multnomah had sales of \$846 million. These five counties accounted for 86 percent of the total sales. Marion continued to be the leading county with sales of \$238 million. Clackamas was second with \$213 million, followed by Washington with \$197 million, then Yamhill and Multnomah with \$143 million and \$55 million, respectively.

Nursery and greenhouse: Acreage by plant material, Oregon, 1999, 2001, 2003, 2005, and 2007 ¹

Plant material	1999	2001	2003	2005	2007	2007/2005
	<i>Acre</i>	<i>Acre</i>	<i>Acre</i>	<i>Acre</i>	<i>Acre</i>	<i>Percent</i>
Bare root	10,800	11,800	12,000	13,200	13,500	102
B & B	14,660	15,500	17,500	18,700	20,000	107
Container	5,500	5,600	6,900	8,600	8,500	99
Greenhouse	640	700	800	800	900	113
Other plant materials ²	5,500	6,700	6,200	5,500	5,900	107
Other acreage ³	4,000	4,900	7,000	5,000	4,900	98
Total	41,100	45,200	50,400	51,800	53,700	104

¹ Acreage by plant material is collected once every two years.

² Other nursery plant materials include sod, bulbs, tubers, holly, cut greens, strawberry plants, and other materials.

³ Includes other acres in the nursery operation such as buildings, loading docks, and parking.

Nursery and greenhouse: Summary, by sales size group, Oregon, 2006-2007

Sales size group	Number of operations		Acres ¹		Gross sales		Total workers ¹		Total wages ¹	
	2006	2007	2005	2007	2006	2007	2005	2007	2005	2007
	<i>Operations</i>	<i>Operations</i>	<i>Acre</i>	<i>Acre</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Workers</i>	<i>Workers</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>
Less than \$20,000	1,131	1,110	2,200	3,500	6,100	10,000	1,170	900	1,100	1,900
\$20,000-\$99,999	483	475	2,700	3,200	21,000	23,000	1,400	1,150	5,020	5,600
\$100,000-\$199,999	84	130	1,200	1,400	11,800	20,000	630	600	4,065	6,200
\$200,000-\$499,999	146	145	3,700	3,900	44,600	42,000	1,500	1,250	13,480	13,800
\$500,000-\$1,999,999	165	150	11,300	11,200	167,000	170,000	4,600	3,900	53,640	61,800
More than \$2,000,000	91	90	30,700	30,500	715,500	723,000	12,700	13,200	216,600	255,700
Total	2,100	2,100	51,800	53,700	966,000	988,000	22,000	21,000	293,905	345,000

¹ Data for category only collected once every two years.

Wages and number of workers

The nursery and greenhouse industry employed 21,000 workers in 2007. Full-time employees, working 150 days or more, accounted for just over half of all workers. The average wage per worker increased to \$16,430. This is an increase of over \$3,000 per worker since 2005. Total wages paid increased 17 percent since 2005 and totaled \$345 million. Comparing the total wages paid to gross sales reveals that wages were approximately 35 percent of the total sales.

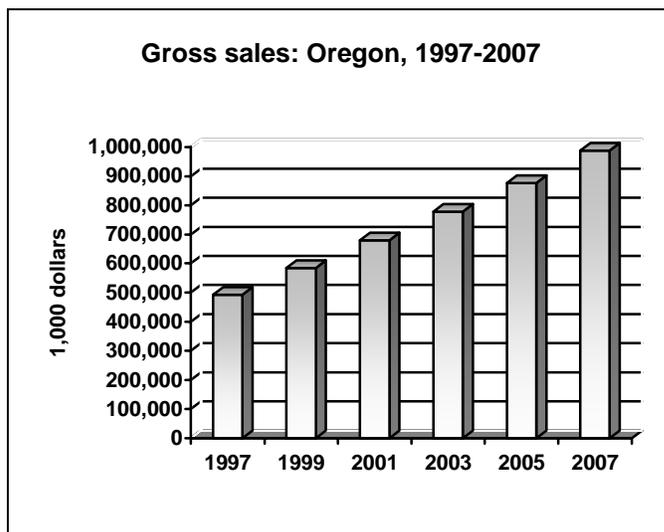
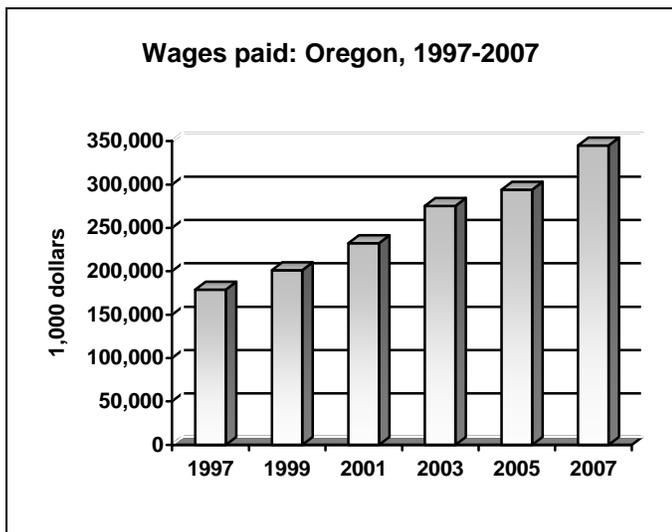
Nursery and greenhouse: Workers, and gross wages paid, Oregon, 2007

Sales size group	Workers			Total wages 1,000 dollars	Average wages per worker Dollars
	Full time	Seasonal	Total		
	<i>Number</i>	<i>Number</i>	<i>Number</i>		
Less than \$20,000	50	850	900	1,900	2,110
\$20,000-\$99,999	200	950	1,150	5,600	4,870
\$100,000-\$199,999	200	400	600	6,200	10,335
\$200,000-\$499,999	500	750	1,250	13,800	11,040
\$500,000-\$1,999,999	2,000	1,900	3,900	61,800	15,845
More than \$2,000,000	7,700	5,500	13,200	255,700	19,370
Total	10,650	10,350	21,000	345,000	16,430

Nursery and greenhouse: Workers, wages, and number of operations, Oregon, 1997 - 2007 ¹

Category	1997	1999	2001	2003	2005	2007	2007/2005
Seasonal workers Workers	12,750	12,200	10,850	11,600	11,600	10,350	89
Full time workers Workers	8,050	9,000	9,550	10,000	10,400	10,650	102
Total workers Workers	20,800	21,200	20,400	21,600	22,000	21,000	95
Total wages 1,000 dollars	178,870	201,170	232,557	275,200	293,905	345,000	117
Average wage per worker Dollars	8,600	9,489	11,400	12,741	13,359	16,430	123
Number of operations Operations	2,040	2,185	2,139	2,044	2,151	2,100	98

¹ Worker and wage data are collected once every two years.



Nursery and greenhouse: Destination of gross sales by plant material, Oregon, 1995, 1999, 2003, and 2007 ¹

Destination	Plant material type											
	Bare root				B & B				Container			
	1995	1999	2003	2007	1995	1999	2003	2007	1995	1999	2003	2007
	<i>Percent of sales</i>											
Oregon	23	18	13	17	23	19	17	23	20	19	18	19
Washington	10	7	6	5	13	10	8	8	10	12	11	10
California	6	6	6	11	4	4	4	4	6	8	6	7
Other western States ²	4	4	5	6	12	9	10	15	9	11	10	10
Upper Midwest ³	24	19	25	27	14	16	16	12	21	16	21	23
Gulf States ⁴	6	4	4	7	2	3	3	2	3	3	3	4
Atlantic States ⁵	11	21	18	7	9	13	14	12	8	14	11	10
Northeast States ⁶	11	18	16	13	20	22	25	21	16	15	17	13
Western Canada ⁷	3	2	2	2	2	2	1	1	4	1	1	1
Eastern Canada ⁸	1	1	5	4	1	2	2	2	3	1	2	2
Other countries	1	-	-	1	-	-	-	-	-	-	-	1
Total	100											

Nursery and greenhouse: Destination of gross sales by plant material, Oregon, 1995, 1999, 2003, and 2007 ¹

Destination	Plant material type								Percent of all sales by destination	
	Greenhouse				Other				2003	2007
	1995	1999	2003	2007	1995	1999	2003	2007		
	<i>Percent of sales</i>	<i>Percent</i>	<i>Percent</i>							
Oregon	57	59	59	53	37	40	32	63	24.4	25.6
Washington	14	15	15	21	11	5	8	4	9.7	10.1
California	12	9	7	6	16	22	21	7	6.9	6.8
Other western States ²	2	2	3	2	3	2	4	1	7.8	8.6
Upper Midwest ³	5	4	4	3	9	7	7	6	17.0	18.7
Gulf States ⁴	2	2	1	1	5	4	5	5	3.2	3.7
Atlantic States ⁵	2	3	2	2	11	6	6	7	11.1	8.5
Northeast States ⁶	3	3	4	6	6	5	9	5	15.5	13.0
Western Canada ⁷	2	2	2	2	1	1	2	1	1.5	1.8
Eastern Canada ⁸	1	1	2	3	-	2	2	1	2.4	2.3
Other countries	-	-	1	1	1	6	4	-	0.5	0.9
Total	100	100.0	100.0							

¹ Gross sales by destination is collected once every five years. No estimates was made for missing 2007 sales destination data. Percentages for 2007 data were based on totals of reported data only.

² Other western States include: MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI.

³ Upper Midwest includes: ND, SD, NE, KS, MN, IA, MO, WI, IL, MI, IN, OH, KY.

⁴ Gulf States include: OK, TX, AR, LA, TN, MS, AL.

⁵ Atlantic States include: MD, DE, WV, VA, NC, SC, GA, FL.

⁶ Northeast States include: ME, NH, VT, MA, CT, RI, NY, PA, NJ.

⁷ Western Canada includes: BC, AB, SK, MB.

⁸ Eastern Canada includes all other provinces.

Survey methodology

The 2007 Oregon Nursery and Greenhouse Survey was designed to collect data on all commercial nurseries, greenhouses, and producers of other nursery plant materials in the state. Other plant materials include products such as cut roses, cut holly, bulbs, sod, strawberry plants, cut flowers, and dried flowers. A stratified random sample of 742 names was selected for the survey. The population consisted of the State of Oregon's list of licensed nurseries and greenhouses along with a list sampling frame maintained by the Oregon Field Office of the National Agricultural Statistics Service. A census was taken for all operations deemed to have \$100,000 or more in sales. Operations with less than \$100,000 in sales were stratified into two groups and randomly selected at different sampling rates. Questionnaires were mailed to the sampled names in May 2008, with a second request mailed in late June. Attempts were then made to contact all non-respondents by phone or through a personal interview during August. Individual estimates were made for all firms with \$500,000 or more in sales that did not return a questionnaire. Adjustments for non-response were calculated for operations with \$100,000-\$499,999 in sales. Finally, sample weights along with non-response adjustments were calculated for sampled operations with less than \$100,000 in sales.

Thank you to all the producers for taking your valuable time to complete the questionnaire. This important study would not be possible without your continued support. Cooperation was excellent with over 80 percent of the sampled names completing the questionnaire.

Nursery and greenhouse: Number of operations, by sales size group, Oregon, 2001-2007

Sales size group	Number of operations						
	2001	2002	2003	2004	2005	2006	2007
Less than \$20,000	1,337	1,375	1,182	1,194	1,194	1,131	1,110
\$20,000-\$99,999	362	353	389	396	483	483	475
\$100,000-\$199,999	98	106	112	115	94	84	130
\$200,000-\$499,999	138	136	136	140	140	146	145
\$500,000-\$1,999,999	134	142	149	144	152	165	150
More than \$2,000,000	70	71	76	84	88	91	90
Total	2,139	2,183	2,044	2,073	2,151	2,100	2,100

Nursery and greenhouse: Gross sales and operations, historic trends, Oregon, 1990-2007

Year	Gross sales	Change from previous year	Operations	
			Total operations	Operations with over \$2 million in sales
	<i>1,000 dollars</i>	<i>Percent</i>	<i>Operations</i>	<i>Operations</i>
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
2004	844,000	108	2,073	84
2005	877,000	104	2,151	88
2006	966,000	110	2,100	91
2007	988,000	102	2,100	90

¹ No data available.

Section 2 – Nursery Acres Operated (continued)

3. List the Oregon county or counties where your nursery or greenhouse acreage is located.
- List each county separately
 - Record the percent of gross sales for each county
 - Exclude acreage located in other States

County	Acres	Percent of Gross Sales	Office Use
	611	621	601
+	612	622	602
+	613	623	603
+	614	624	604
Total (Acres should equal total in item 2g on page 1)	615 =	100%	

Section 3 – Gross Sales Value

4. What were your gross (**invoice**) 2007 sales from your nursery and greenhouse operation for each of the following plant material categories.
- If calendar year data are not available, please use the most recent fiscal year period.
 - Exclude plant material purchased for immediate resale.

Plant Material Categories	2007 Gross Sales (in dollars)
a. Bare Root	311 \$ _____
b. Balled and Burlapped	312 \$ _____
c. Container	313 \$ _____
d. Greenhouse	314 \$ _____
e. Other Nursery Plant Material (include sod, bulbs, tubers, holly, cut greens, etc.)	315 \$ _____
f. Total (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 2007? (include contract workers)	500
a. Of these total workers, how many were seasonal/part-time during 2007? (worked less than 150 days)	500
b. Of these total workers, how many were full-time during 2007? (worked more than 150 days)	500
6. What were the total gross wages paid for your nursery/greenhouse operation during 2007? (Include employer's cost for social security, workers compensation, insurance premiums, pension plans, and any other benefits provided.)	510 \$ _____

Section 6 – Change in Operation



Only complete question 8 if you answered NO to question # 1 on page 1.

8. Has this operation been sold, rented out, or turned over to someone else?

<input type="checkbox"/> Yes – please identify the new operator. Name: _____ Address: _____ City: _____ State: _____ Zip _____ Phone number: _____	<input type="checkbox"/> No – please check one reason which applies. <input type="checkbox"/> Retail sales of only. <input type="checkbox"/> New operation with no 2007 sales. <input type="checkbox"/> Other (explain) _____ <input type="checkbox"/> Landlord
--	--

Nursery Comments:

*** Thank you for completing the 2007 Nursery and Greenhouse Survey.***

Section 7 – Survey Results

9. Would you like to receive a copy of the results of this survey?

YES

NO

Office Use
099
910
920

Reported by: _____ Telephone: _____ Date: _____

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.

Additional references to Oregon horticulture data

Oregon Nursery and Greenhouse Summary, (1995 to Current)
www.nass.usda.gov/Statistics_by_State/Oregon/Publications/Horticulture

National Nursery Crops Summary: United States and State data, (2001 to Current)
usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1115

Agricultural Chemical Usage: Nursery and Floriculture Summary, (2001 to Current)
usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1570

Floriculture Crops: United States and State data, (1978 to Current)
usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1072

2002 Census of Agriculture with comparisons to 1997: United States and State data. 11 pages.
www.nass.usda.gov/census/census02/volume1/us/st99_2_034_034.pdf

2002 Census of Agriculture with comparisons to 1997: Oregon summary. 1 page.
www.nass.usda.gov/census/census02/volume1/or/st41_1_038_039.pdf

2002 Census of Agriculture with comparisons to 1997: Oregon County data. 6 pages.
www.nass.usda.gov/census/census02/volume1/or/st41_2_034_034.pdf

1998 Census of Horticultural Specialties: Published in 2000. 286 pages.
www.nass.usda.gov/census/census97/horticulture/horticulture.htm

2007 Census of Agriculture: **Published in February 2009**

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Additional information about this and other publications are available at the National Agricultural Statistics Service websites.

National website: www.nass.usda.gov
Oregon website: www.nass.usda.gov/or

Additional questions can also be directed to the Oregon Field Office of the National Agricultural Statistics Service at (503) 326-2131 or (800) 338-2157.

