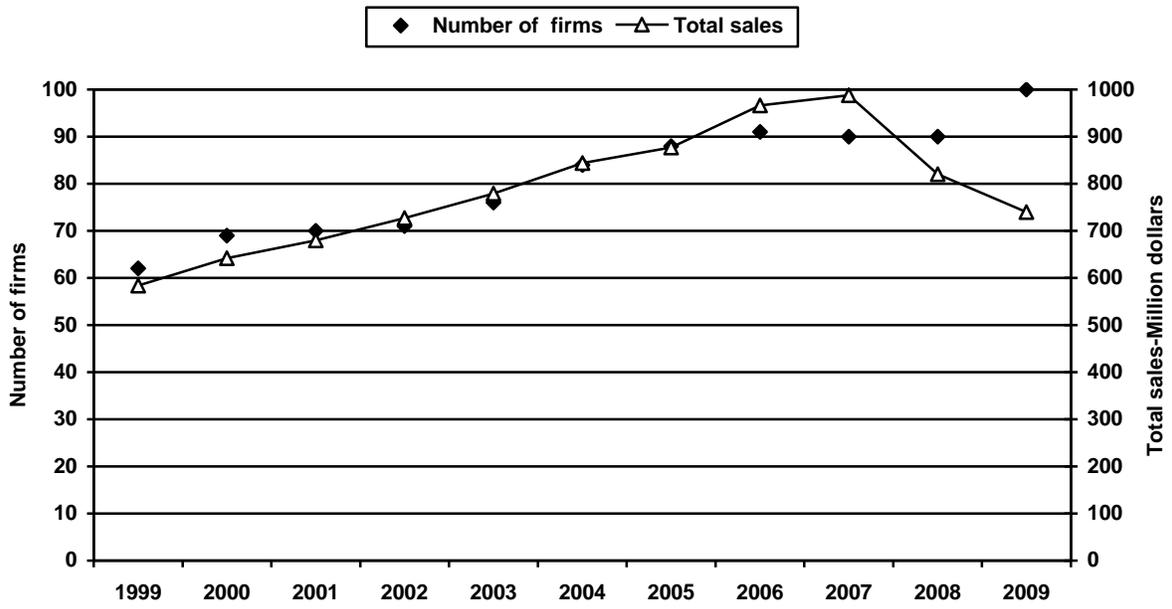


Oregon Nursery and Greenhouse Survey 2009

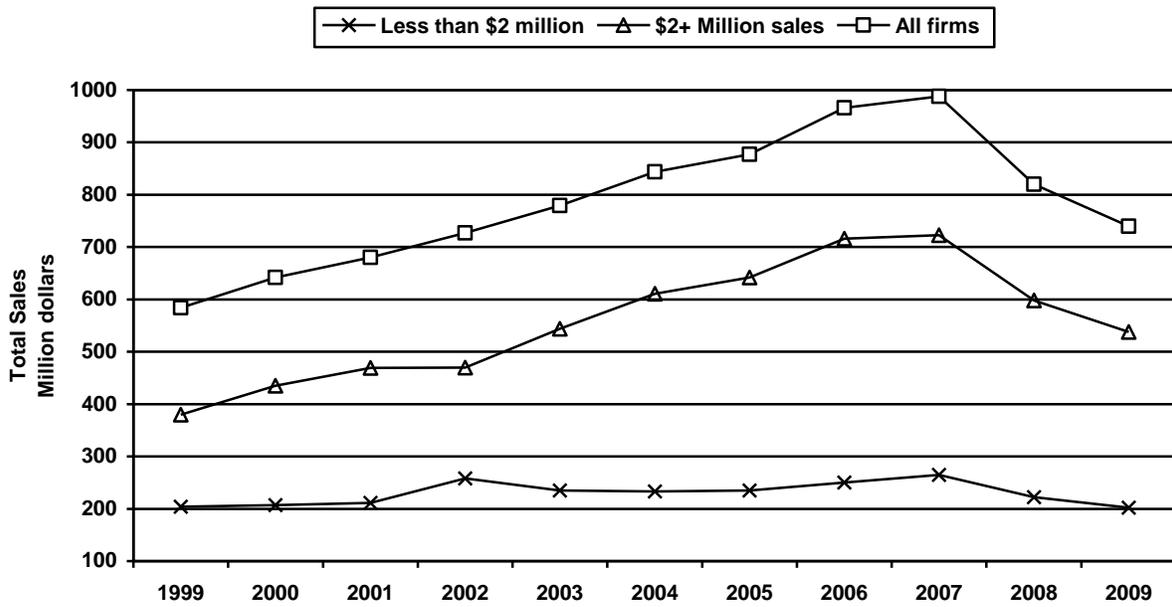


USDA-NASS Oregon Field Office

Number of firms with \$2+ million in sales,
and total sales, Oregon, 1999-2009



Gross sales of firms with above and below \$2 million in sales,
and total sales, Oregon, 1999-2009



2009

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 805 SW Broadway, Suite 910, Portland, OR 97205, (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.

FOREWORD

September 2010

It is my pleasure to present the results of the *2009 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 twentieth year of documenting through statistics the progress of a very key Oregon agricultural industry.

Oregon's nursery and greenhouse industry continues to rank high in the State's agricultural picture, with 2009 total gross value of sales coming in at \$740 million, down 10 percent from 2008. Sales for nurseries with total gross value of sales between \$500,000 and \$1,999,999 dollars declined 7 percent and sales for those with total gross value of sales between \$20,000 and \$99,999 showed the largest percentage drop, down 32 percent from the previous year. Container sales still dominated the product categories, accounting for nearly 45 percent of the sales for all product types; yet, this category is down 19 percent from 2008. The estimated number of operations decreased in 2009, totaling 1,800 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 84 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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2009 Oregon nursery sales down 10 percent

Oregon's nursery sales decreased to \$740 million in 2009. This is a 10 percent decline from 2008. The total number of operations in the State was estimated at 1,800, down 15 percent from last year's estimate of 2,130. Operations with \$2 million or more in sales comprised 73 percent of total sales. Smaller firms, with \$20,000 or less in sales, accounted for just over half of the total operations in the State. Firms with \$20,000 to \$99,999 in sales showed the largest sales decline, down 32 percent from 2008 to \$14.7 million.

(Continued on page 3)

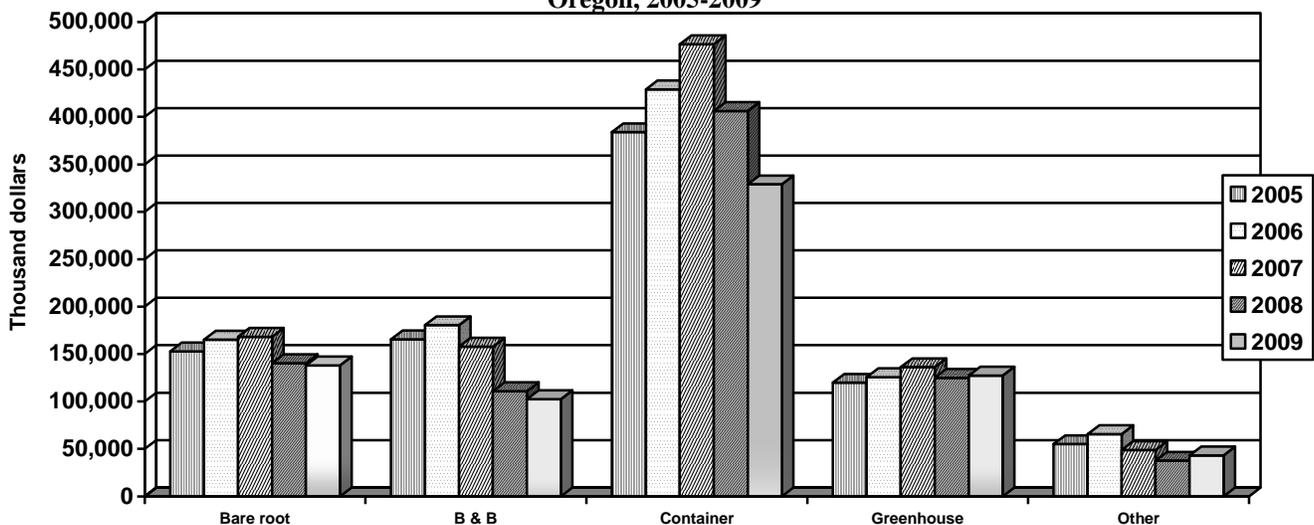
Nursery and greenhouse: Gross sales, by plant material, Oregon, 2003-2009

Plant material	2003	2004	2005	2006	2007	2008	2009	2009/2008
	<i>1,000 dollars</i>	<i>Percent</i>						
Bare root	150,100	159,400	152,700	165,200	168,300	140,400	138,000	98
B & B	147,400	151,000	165,600	180,500	157,900	110,800	102,500	93
Container	298,300	345,300	384,000	429,000	476,700	406,300	329,000	81
Greenhouse	124,300	129,400	119,700	125,700	136,200	124,900	127,300	102
Other	58,900	58,900	55,000	65,600	48,900	37,600	43,200	115
Total	779,000	844,000	877,000	966,000	988,000	820,000	740,000	90

Nursery and greenhouse: Gross sales by sales size group, Oregon, 2005-2009

Sales size group	Gross sales					2009/2008
	2005	2006	2007	2008	2009	
	<i>1,000 dollars</i>	<i>Percent</i>				
Less than \$20,000	5,900	6,100	10,000	4,300	3,900	91
\$20,000-\$99,999	21,600	21,000	23,000	21,700	14,700	68
\$100,000-\$199,999	13,200	11,800	20,000	17,200	16,400	95
\$200,000-\$499,999	43,500	44,600	42,000	44,600	42,800	96
\$500,000-\$1,999,999	150,900	167,000	170,000	134,000	124,100	93
More than \$2,000,000	641,900	715,500	723,000	598,200	538,100	90
Total	877,000	966,000	988,000	820,000	740,000	90

Nursery and greenhouse: Gross sales by plant material, Oregon, 2005-2009

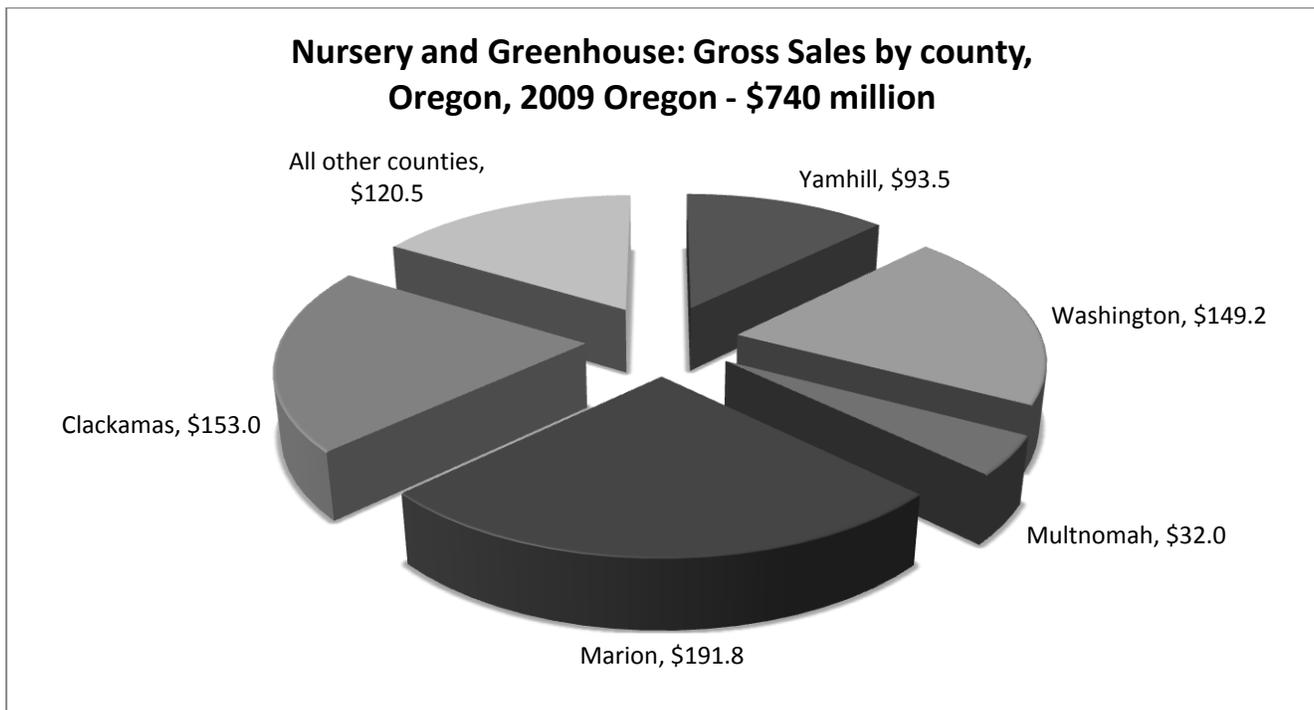


Nursery and greenhouse: Operations, acreage, and gross sales, by county, Oregon, 2007-2009

County	Number of operations	Acres	Gross sales			
	2009	2009	2007	2008	2009	2009 / 2008
	<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	480	14,200	212,700	170,000	153,000	90
Curry	10	100	3,625	3,100	2,000	65
Deschutes	10	100	4,700	4,800	5,800	121
Jackson	50	50	3,500	4,000	2,600	65
Klamath	10	1,200	17,500	18,500	20,100	109
Lane	130	1,100	33,000	27,000	27,100	100
Linn	50	850	18,200	12,000	12,350	103
Marion	280	16,200	238,000	190,000	191,800	101
Multnomah	180	4,900	55,000	42,000	32,000	76
Polk	50	1,600	10,500	14,000	9,900	71
Umatilla	20	600	8,000	10,000	5,500	55
Washington	230	6,500	197,000	175,000	149,200	85
Yamhill	70	4,400	143,000	110,000	93,500	85
Other counties ¹	230	2,200	43,275	39,600	35,150	89
Oregon	1,800	54,000	988,000	820,000	740,000	90
Top five counties ²	1,240	46,200	845,700	687,000	619,500	90

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.



Total nursery sales decreased \$80 million. Balled and burlapped sales declined 7 percent with sales down \$8.3 million. Bare root product sales declined 2 percent, decreasing by \$2.4 million. Container sales decreased 19 percent, down \$77.3 million from 2008. Greenhouse sales increased 2 percent, with sales up \$2.4 million. All other nursery product sales increased 15 percent with sales \$5.6 million higher than last year.

Oregon's top five counties of production, Marion, Washington, Clackamas, Yamhill, and Multnomah, had sales of \$619.5 million. These five counties accounted for 84 percent of the total sales. Marion continued to be the leading county with sales of \$191.8 million. Clackamas replaced Washington as the second largest county with sales of \$153 million. Washington was third with \$149.2 million, followed by Yamhill and Multnomah with sales of \$93.5 million and \$32 million, respectively.

Nursery and greenhouse: Acreage by plant material, Oregon, 2001, 2003, 2005, 2007, and 2009 ¹

Plant material	2001	2003	2005	2007	2009	2009/2007
	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Percent</i>
Bare root	11,800	12,000	13,200	13,500	13,100	97
B & B	15,500	17,500	18,700	20,000	20,100	101
Container	5,600	6,900	8,600	8,500	9,000	106
Greenhouse	700	800	800	900	1,200	133
Other plant materials ²	6,700	6,200	5,500	5,900	5,500	93
Other acreage ³	4,900	7,000	5,000	4,900	5,100	104
Total	45,200	50,400	51,800	53,700	54,000	101

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, 2008-2009

Sales size group	Number of operations		Acres ¹		Gross sales		Total workers ¹		Total wages ¹	
	2008	2009	2007	2009	2008	2009	2007	2009	2007	2009
	<i>Operations</i>	<i>Operations</i>	<i>Acres</i>	<i>Acres</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	1,130	1,000	3,500	3,700	4,300	3,900	900	500	1,900	600
\$20,000-\$99,999	470	310	3,200	3,200	21,700	14,700	1,150	700	5,600	5,150
\$100,000-\$199,999	140	100	1,400	2,200	17,200	16,400	600	700	6,200	7,000
\$200,000-\$499,999	155	150	3,900	5,300	44,600	42,800	1,250	3,200	13,800	16,500
\$500,000-\$1,999,999	145	140	11,200	10,400	134,000	124,100	3,900	4,200	61,800	53,500
More than \$2,000,000	90	100	30,500	29,200	598,200	538,100	13,200	11,300	255,700	206,000
Total	2,130	1,800	53,700	54,000	820,000	740,000	21,000	20,600	345,000	288,750

¹ Data for category only collected once every two years.

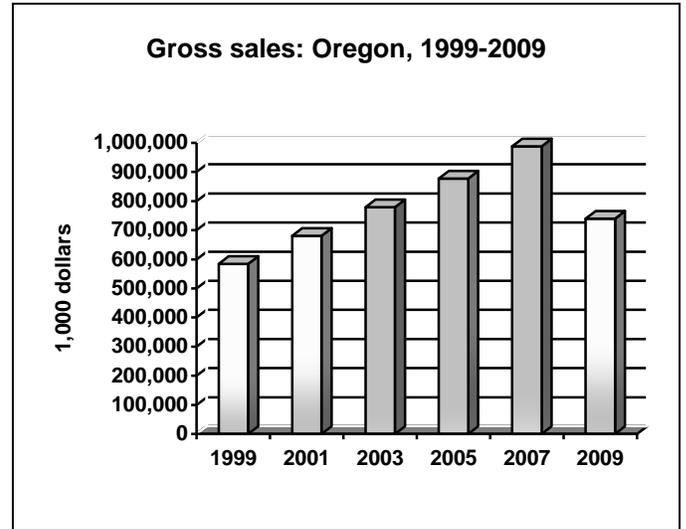
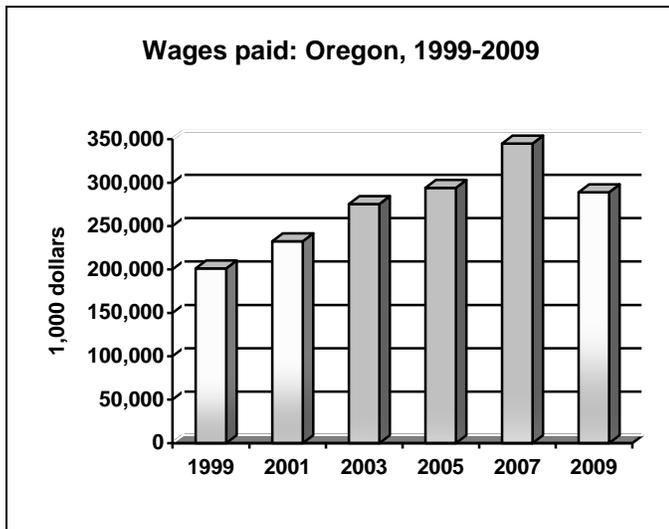
Nursery and greenhouse: Workers, and gross wages paid, Oregon, 2009

Sales size group	Workers			Total wages 1,000 dollars	Average wages per worker Dollars
	Full time	Seasonal	Total		
	Number	Number	Number		
Less than \$20,000	50	450	500	600	1,200
\$20,000-\$99,999	250	450	700	5,150	7,357
\$100,000-\$199,999	300	400	700	7,000	10,000
\$200,000-\$499,999	700	2,500	3,200	16,500	5,156
\$500,000-\$1,999,999	1,700	2,500	4,200	53,500	12,738
More than \$2,000,000	6,500	4,800	11,300	206,000	18,230
Total	9,500	11,100	20,600	288,750	14,016

Nursery and greenhouse: Workers, wages, and number of operations, Oregon, 1999 - 2009 ¹

Category	1999	2001	2003	2005	2007	2009	2009/2007
Seasonal workers Workers	12,200	10,850	11,600	11,600	10,350	11,100	107
Full time workers Workers	9,000	9,550	10,000	10,400	10,650	9,500	89
Total workers Workers	21,200	20,400	21,600	22,000	21,000	20,600	98
Total wages 1,000 dollars	201,170	232,557	275,200	293,905	345,000	288,750	84
Average wage per worker Dollars	9,489	11,400	12,741	13,359	16,430	14,016	85
Number of operations Operations	2,185	2,139	2,044	2,151	2,100	1,800	86

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	100.0	100.0						

¹ Gross sales by destination is collected once every five years. No estimates were 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 2009 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 750 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 Statistic 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 2010, 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.

Nursery and greenhouse: Number of operations, by sales size group, Oregon, 2003-2009

Sales size group	Number of operations						
	2003	2004	2005	2006	2007	2008	2009
Less than \$20,000	1,182	1,194	1,194	1,131	1,110	1,130	1,000
\$20,000-\$99,999	389	396	483	483	475	470	310
\$100,000-\$199,999	112	115	94	84	130	140	100
\$200,000-\$499,999	136	140	140	146	145	155	150
\$500,000-\$1,999,999	149	144	152	165	150	145	140
More than \$2,000,000	76	84	88	91	90	90	100
Total	2,044	2,073	2,151	2,100	2,100	2,130	1,800

Nursery and greenhouse: Gross sales and operations, historic trends, Oregon, 1991-2009

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>
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
2008	820,000	83	2,130	90
2009	740,000	90	1,800	100

¹ No data available.



OREGON NURSERY AND GREENHOUSE SURVEY 2009



Oregon Field Office
 1220 S.W. 3rd Ave. Room 1735
 Portland, OR 97204
 Phone 503-326-2131, Fax 503-326-2549
 nass-or@nass.usda.gov

Dear Nursery/Greenhouse Grower:

The nursery and greenhouse industry continues to gain prominence in Oregon as the State's leading agricultural industry and nationally as a leading State in production and value. Please take a few minutes to complete the annual Nursery and Greenhouse Survey which is the only means of measuring annual growth and change of Oregon's major agricultural industry. Under Title 7 of the U.S. Code and CIPSEA (Public Law 107-347), facts about your operation are kept **confidential** and used only for statistical purposes. Response is **voluntary**. The nursery/greenhouse report will be released in August 2010 and is used extensively by your industry, universities, the legislature and local governments for informed decision making concerning issues affecting both the industry and Oregonians in general.

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 2009?

YES – Please go to Section 2. **NO** – Please go to page 3, Section 6.

SECTION 2 – Gross Sales Value

2. What were your gross (invoice) sales from your nursery and greenhouse operation for each of the following plant material categories, and in total during 2009? If calendar year data are not available, please use the most recent fiscal year period. (exclude plant material purchased for immediate resale.)

- a. Bare Root
- b. Balled and Burlapped
- c. Container
- d. Greenhouse
- e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.).....
- f. **TOTAL** (should equal a+b+c+d+e)

2009 Gross Sales (in Dollars)
311
312
313
314
315
310

Continue →

SECTION 3 – Nursery Acres Operated

3. What was the acreage under production, by plant material type, other nursery acreage, and total for your operation during 2009? (Please report acres to the nearest one-tenth.)
(include acreage even if no sales were made.)

		Acres
a. Bare Root	101	. ____
b. Balled and Burlapped	102	. ____
c. Container	103	. ____
		Square Feet
d. Greenhouse (enter square footage and acreage)	104	105 . ____
e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.).....	106	. ____
f. Other Nursery Acreage in Operation (buildings, loading docks, parking, etc.)	107	. ____
g. Total (should equal items a+b+c+d+e+f)	110	. ____

SECTION 4 – Acres Operated by County

4. 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
..... +	611	621	601
..... +	612	622	602
..... +	613	623	603
..... +	614	624	604
TOTAL (Should equal total in item 3g above) ... =	615	100%	

SECTION 5 – Hired and Contract Workers

5. What was the total number of workers paid by this operation during 2009?
 (include contract workers)
- a. Of these total workers, how many were seasonal/part-time
 (worked less than 150 days) during 2009?
- b. Of these total workers, how many were full-time
 (worked more than 150 days) during 2009?

Number
500
501
502
Dollars
510

6. What were the total gross wages paid for your nursery/greenhouse operation during 2009? (include employer's cost for social security, workers compensation, insurance premiums, pension plans, and any other benefits provided.)

*** SKIP TO SECTION 7 ***

SECTION 6 – Change in Operator

7. 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 only
- Address: _____ New operation with no 2009 sales.
- City, State: _____ Zip: _____ (Please complete Sections 3 & 4)
- Other (Explain) _____

SECTION 7 – Survey Results

8. **Survey Results:** To receive the complete results of this survey on the release date, go to <http://www.nass.usda.gov/results>

Would you rather have a brief summary mailed to you at a later date? **Yes = 1** **No = 3** 99

Comments

If additional help is needed, please call: 1-800-338-2157. In Portland area, please call: 503-326-2131

Reported by: _____ Phone: _____ Date: _____

Additional references to Oregon horticulture data

Oregon Nursery and Greenhouse Summary, *(1995 to Current)*

www.nass.usda.gov/Statistics_by_State/Oregon/Publications/Horticulture/index.asp

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

2007 Census of Agriculture with comparisons to 2002: United States and State data. 14 pages.

www.agcensus.usda.gov/publications/2007/index.asp (Table 35)

2007 Census of Agriculture with comparisons to 2002: Oregon and County data. 1 page.

To review State (table 37):

http://www.agcensus.usda.gov/Publications/2007/Full_Report/Volume_1,_Chapter_1_State_Level/Oregon/index.asp

To review County (table 35):

http://www.agcensus.usda.gov/Publications/2007/Full_Report/Volume_1,_Chapter_2_County_Level/Oregon/index.asp

Oregon Association of Nurseries

www.oan.org

29751 SW Town Center Loop W, Wilsonville, OR 97070

Tel: 503-682-5089 Toll-free: 1-800-342-6401

Fax: 503-682-5099

Oregon Field Office, National Agricultural Statistics Service

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.