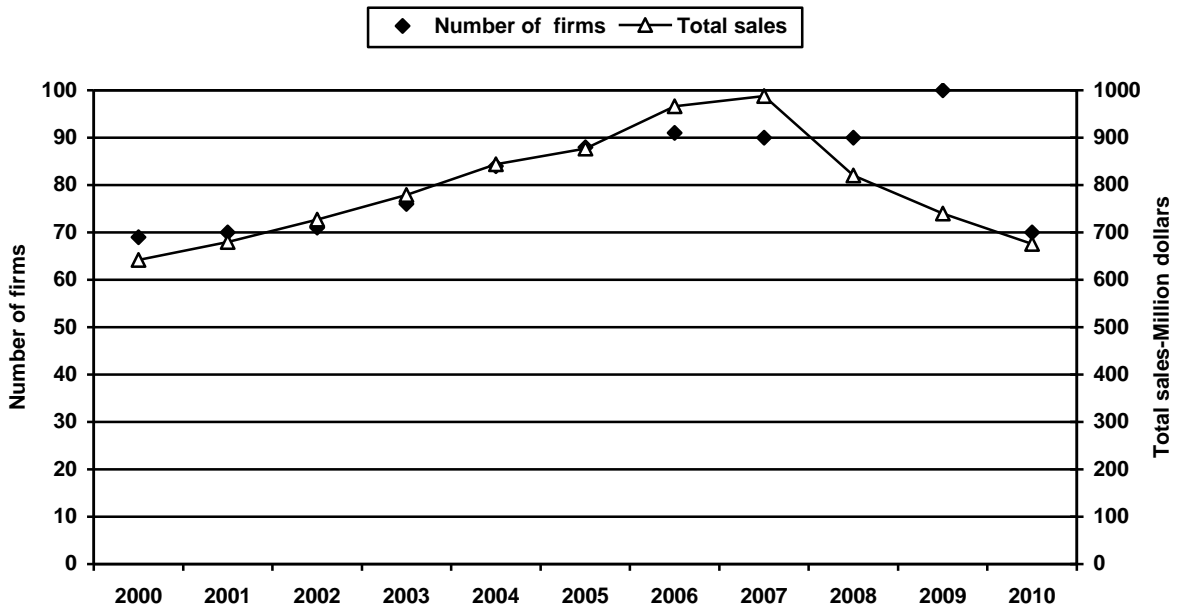


Oregon Nursery and Greenhouse Survey 2010

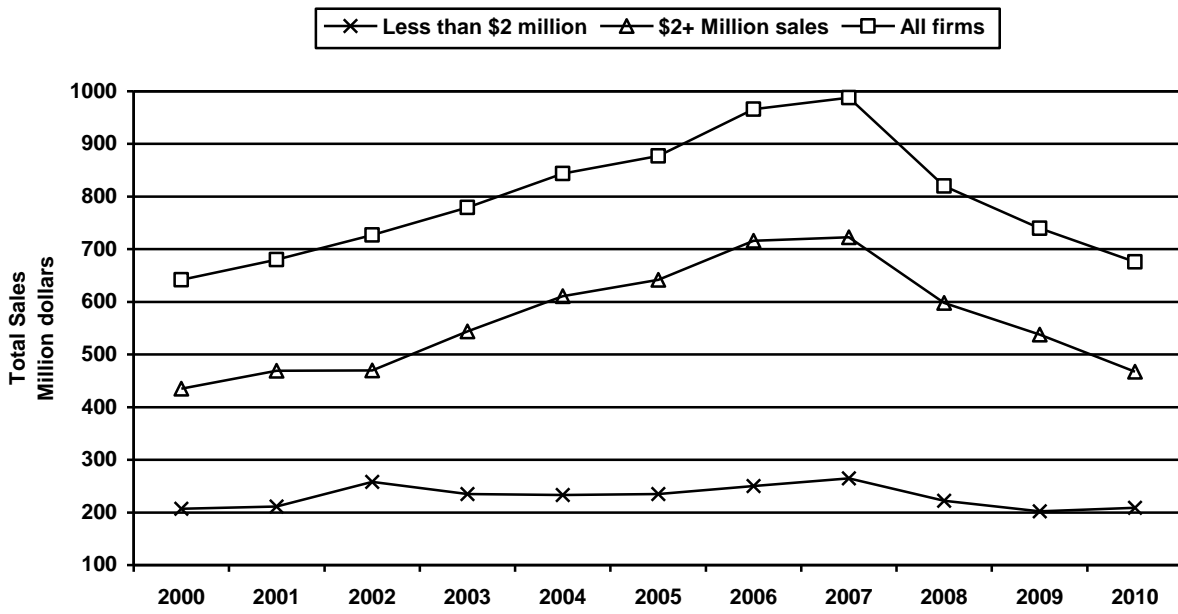


USDA-NASS Oregon Field Office

Number of firms with \$2+ million in sales,
and total sales, Oregon, 2000-2010



Gross sales of firms with above and below \$2 million in sales,
and total sales, Oregon, 2000-2010



2010

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*
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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 2011

I am pleased to present the results of the *2010 Oregon Nursery and Greenhouse Survey*. Thanks to the support of the State's 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 twenty-first 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 2010 total gross value of sales coming in at \$676 million, down 9 percent from 2009. Sales for nurseries and greenhouses with total gross value of sales over \$2,000,000 dollars declined 13 percent and sales for those with total gross value of sales between \$200,000 and \$499,999 showed the largest percentage drop, down 28 percent from the previous year. Nurseries and greenhouses with sales between \$500,000 and \$1,999,999 increased 15 percent from 2009. Container sales still dominated the product categories, accounting for nearly 42 percent of the sales for all product types; yet, this category is down 14 percent from 2009. The estimated number of operations remained at 1,800 operations during 2010. The top five counties in terms of gross sales were Marion, Washington, Clackamas, Yamhill, and Lane. These counties are all in or near metropolitan areas 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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2010 Oregon nursery sales down 9 percent

Oregon's nursery sales decreased to \$676 million in 2010, a 9 percent decline from 2009. This is the third consecutive decline since 2007 and is close to 2001 sales level of \$680 million. The total number of operations in the State was estimated at 1,800, unchanged from last year's estimate. Operations with \$2 million or more in sales comprised 69 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 \$200,000 to \$499,999 in sales showed the largest sales decline, down 28 percent from 2009 to \$30.9 million.

(Continued on page 3)

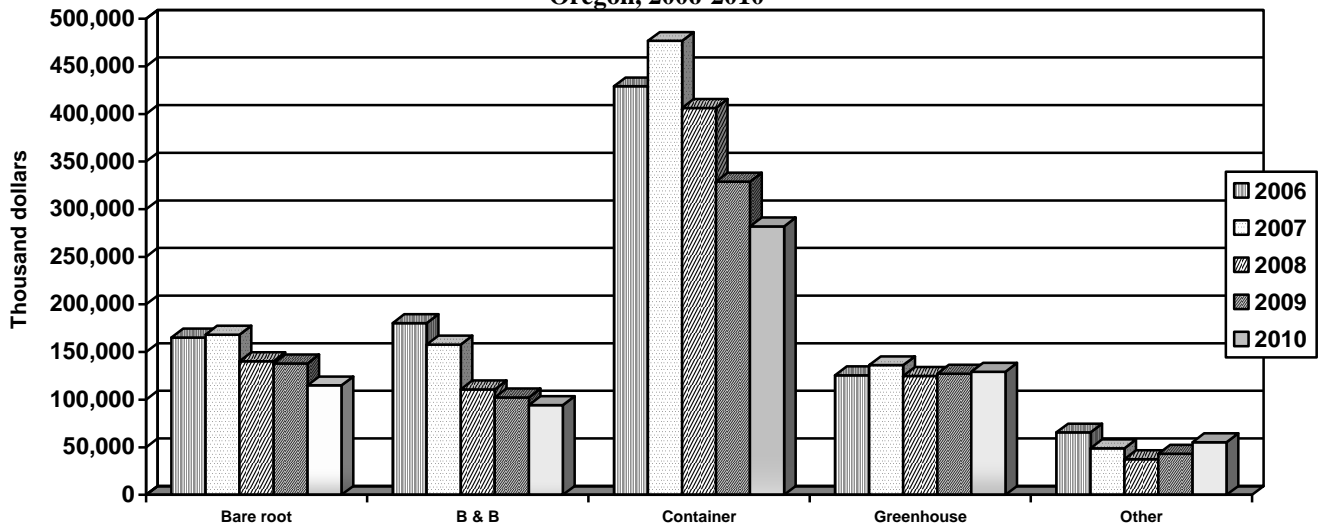
Nursery and greenhouse: Gross sales, by plant material, Oregon, 2004-2010

Plant material	2004	2005	2006	2007	2008	2009	2010	2010/2009
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Bare root	159,400	152,700	165,200	168,300	140,400	138,000	115,000	83
B & B	151,000	165,600	180,500	157,900	110,800	102,500	94,300	92
Container	345,300	384,000	429,000	476,700	406,300	329,000	282,000	86
Greenhouse	129,400	119,700	125,700	136,200	124,900	127,300	129,300	102
Other	58,900	55,000	65,600	48,900	37,600	43,200	55,400	128
Total	844,000	877,000	966,000	988,000	820,000	740,000	676,000	91

Nursery and greenhouse: Gross sales by sales size group, Oregon, 2006-2010

Sales size group	Gross sales					2010/2009
	2006	2007	2008	2009	2010	
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent</i>
Less than \$20,000	6,100	10,000	4,300	3,900	4,000	103
\$20,000-\$99,999	21,000	23,000	21,700	14,700	16,700	114
\$100,000-\$199,999	11,800	20,000	17,200	16,400	15,300	93
\$200,000-\$499,999	44,600	42,000	44,600	42,800	30,900	72
\$500,000-\$1,999,999	167,000	170,000	134,000	124,100	142,100	115
More than \$2,000,000	715,500	723,000	598,200	538,100	467,000	87
Total	966,000	988,000	820,000	740,000	676,000	91

Nursery and greenhouse: Gross sales by plant material, Oregon, 2006-2010



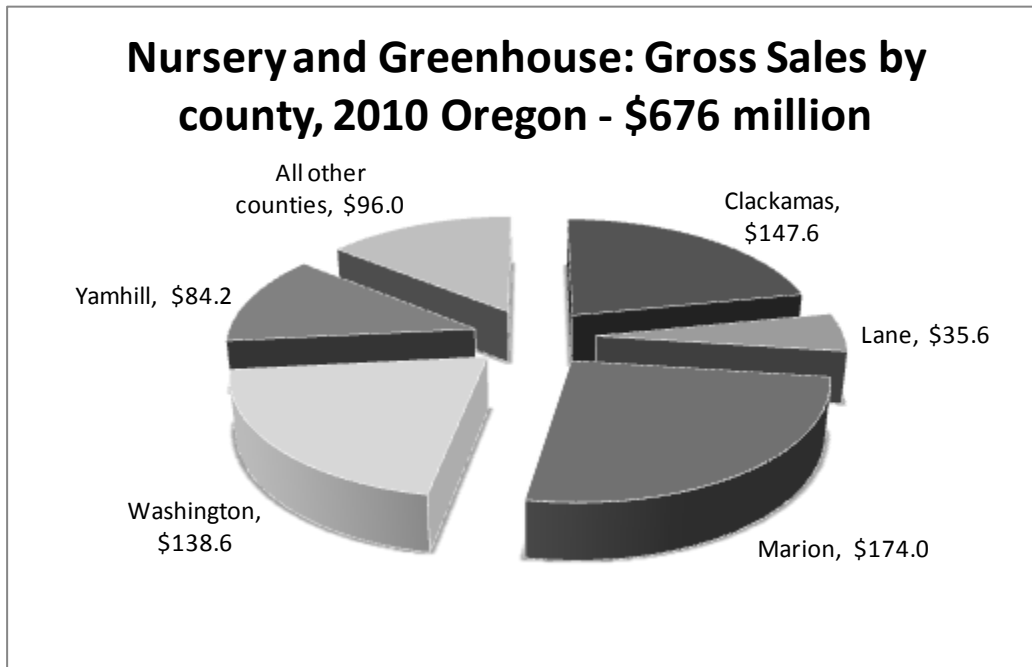
Nursery and greenhouse: Operations, acreage, and gross sales, by county, Oregon, 2008-2010

County	Number of operations	Acres ³	Gross sales			
	2010	2009	2008	2009	2010	2010 / 2009
	<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	170,000	153,000	147,600	96
Curry	15	100	3,100	2,000	3,500	175
Jackson	60	50	4,000	2,600	2,000	77
Josephine	45	300	3,000	1,850	2,900	157
Klamath	10	1,200	18,500	20,100	12,500	62
Lane	130	1,100	27,000	27,100	35,600	131
Linn	65	850	12,000	12,350	13,900	113
Marion	330	16,200	190,000	191,800	174,000	91
Multnomah	155	4,900	42,000	32,000	29,300	92
Polk	50	1,600	14,000	9,900	7,200	73
Umatilla	20	600	10,000	5,500	8,400	153
Washington	200	6,500	175,000	149,200	138,600	93
Yamhill	80	4,400	110,000	93,500	84,200	90
Other counties ¹	160	1,600	33,600	31,750	16,300	51
Oregon	1,800	54,000	820,000	740,000	676,000	91
Top five counties ²	1,220	46,200	687,000	619,500	580,000	94

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 for 2010 data include: Clackamas, Lane, Marion, Washington, and Yamhill.

³ Data for category only collected once every two years.



Total nursery and greenhouse sales decreased \$64 million. Bare root product sales declined 17 percent, decreasing by \$23 million. Balled and burlapped sales declined 8 percent with sales down \$8.2 million. Container sales decreased 14 percent, down \$47 million from 2009. Greenhouse sales increased 2 percent, with sales up \$2 million. All other nursery product sales increased 28 percent with sales \$12.2 million higher than last year.

Oregon's top five counties of production, Marion, Clackamas, Washington, Yamhill, and Lane, had sales of \$580 million. These five counties accounted for 86 percent of the total sales. Marion continued to be the leading county with sales of \$174 million. Clackamas continued as the second largest county with sales of \$147.6 million. Washington was third with \$138.6 million, followed by Yamhill in fourth with sales of \$84.2 million. Lane replaced Multnomah as the fifth largest county with sales of \$35.6 million.

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, 2007-2010

Sales size group	Number of operations		Acres ¹		Gross sales		Total workers ¹		Total wages ¹	
	2009	2010	2007	2009	2009	2010	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	1,000	950	3,500	3,700	3,900	4,000	900	500	1,900	600
\$20,000-\$99,999	310	400	3,200	3,200	14,700	16,700	1,150	700	5,600	5,150
\$100,000-\$199,999	100	120	1,400	2,200	16,400	15,300	600	700	6,200	7,000
\$200,000-\$499,999	150	110	3,900	5,300	42,800	30,900	1,250	3,200	13,800	16,500
\$500,000-\$1,999,999	140	150	11,200	10,400	124,100	142,100	3,900	4,200	61,800	53,500
More than \$2,000,000	100	70	30,500	29,200	538,100	467,000	13,200	11,300	255,700	206,000
Total	1,800	1,800	53,700	54,000	740,000	676,000	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 ¹

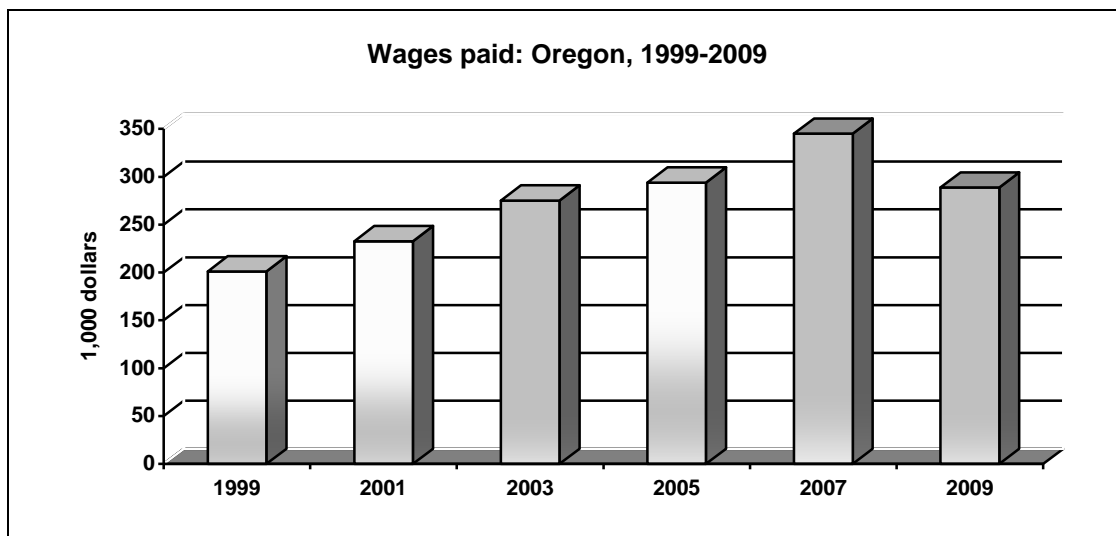
Sales size group	Workers			Total wages <i>1,000 dollars</i>	Average wages per worker <i>Dollars</i>
	Full time	Seasonal	Total		
	<i>Number</i>	<i>Number</i>	<i>Number</i>		
Less than \$20,000	50	450	500	600	1,200
\$20,000-\$99,999	250	450	700	5,150	7,357
\$100,000-\$199,999	300	400	700	7,000	10,000
\$200,000-\$499,999	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

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

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>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<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	100	100	100	100	100	100	100	100	100	100	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 of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<i>Percent of sales</i>	<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	100	100	100	100	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 2010 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 690 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 USDA, 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 mid May 2011, with a second request mailed in mid June. Attempts were then made to contact all non-respondents by phone or a personal interview through 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 nursery and greenhouse producers for taking your valuable time to complete this survey. This important study would not be possible without your continued support and cooperation.

Nursery and greenhouse: Number of operations, by sales size group, Oregon, 2004-2010

Sales size group	Number of operations						
	2004	2005	2006	2007	2008	2009	2010
Less than \$20,000	1,194	1,194	1,131	1,110	1,130	1,000	950
\$20,000-\$99,999	396	483	483	475	470	310	400
\$100,000-\$199,999	115	94	84	130	140	100	120
\$200,000-\$499,999	140	140	146	145	155	150	110
\$500,000-\$1,999,999	144	152	165	150	145	140	150
More than \$2,000,000	84	88	91	90	90	100	70
Total	2,073	2,151	2,100	2,100	2,130	1,800	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
2010	676,000	91	1,800	70

¹ No data available.



OREGON NURSERY AND GREENHOUSE SURVEY - 2010



Oregon Field Office
805 S.W. Broadway, Suite 910
Portland, OR. 97205
Phone 503-326-2131
Fax 800-731-7011
nass-or@nass.usda.gov

Dear Nursery/Greenhouse Grower:

Nursery and greenhouse production continues to be Oregon's leading agricultural industry. Please take a few minutes to complete this questionnaire. The information collected from this important survey is the only source for measuring annual growth and change in the 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**. Thank you for your cooperation.

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 2010?

YES - Please continue with section 2 below. **NO** - Please go to back page, question # 4.

Section 2 – Gross Sales Value

2. What were your gross (**invoice**) 2010 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	2010 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 2 – Gross Sales Value (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 State

County	2010 Gross Sales			Office Use
	Dollar Value	OR	Percent	
	611	621		601
+	612	622		602
+	613	623		603
+	614	624		604
Total (should equal total in item 2f on page 1)	615		100%	

Section 3 – Change in Operation



Only complete question 4 if you answered NO to question # 1 on page 1.

4. 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 only. <input type="checkbox"/> New operation with no 2010 sales. <input type="checkbox"/> Other (explain) _____ <input type="checkbox"/> Landlord
--	---

Survey Results: To receive the complete results of this survey on the release date, go to <http://www.nass.usda.gov/or>.
 Would you rather have a brief summary mailed to you at a later date?

Yes = 1 No = 3

099

Reported by: _____ Telephone: _____ Date: _____

For office use only					
Response	Respondent	Mode	Enum.	Eval.	R. Unit
9901	9902	9903	098	100	921

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. The valid OMB number is 0535-0244. The time required to complete this information collection is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

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

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USDA- National Agricultural Statistics Service, Oregon Field Office

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 USDA's National Agricultural Statistics Service at (503) 326-2131 or (800) 338-2157.