

ACH17-25/December 2020

The number of operations producing horticulture products in 2019 decreased 11% from 2014. Sales of horticulture products decreased slightly (by \$10.1 million), while expenses increased 6%. Five states accounted for 50% of horticulture sales and 28% of horticulture operations. Nursery stock, annual bedding plants, and sod were the largest sectors in 2019, with combined sales of over \$8 billion.

20,655 operations



\$13.8 billion horticulture sales



\$11.9 billion sold wholesale

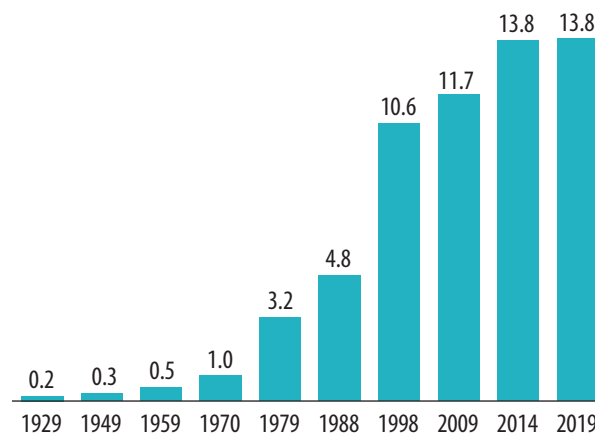


Horticulture Sales

California, the top state in horticulture sales, sold \$2.6 billion in horticulture products in 2019, down 9% from 2014. Unlike California, many of the other top producing states had increases in sales, yet experienced a decrease in the number of operations. Florida, the state with the most horticulture operations, had an 18% decrease in the number of operations. Horticulture products were primarily marketed wholesale, accounting for 86% of the value in sales compared to 14% retail.

	2019 Sales (\$ million)	% Change Since 2014
Nursery stock	4,545	7
Annual bedding	2,244	-13
Sod	1,272	12
Potted flowering	1,200	11
Potted herbaceous	923	-2
Food crops grown under protection	703	-12
Propagative materials	720	4
Foliage	691	-4
Cut flowers and cut lei flowers	386	-17
Transplants for vegetables and strawberries	370	-1
Cultivated Christmas trees	357	-3

U.S. Horticulture Sales, 1929-2019 (\$ billion)



Top States

Horticulture Sales, 2019 (\$ mil)

California	2,629
Florida	1,932
Oregon	1,016
Michigan	695
Texas	599
North Carolina	556
New Jersey	505
Ohio	469
Georgia	354
Pennsylvania	310
New York	310
Washington	300

Horticulture Production

Land Area Used for Production, 2014 and 2019

	2014	2019	% Change
Acres in production			
In the open, excluding			
under shade structures	497,339	549,063	10%
Sod	320,566	334,206	4%
Cultivated Christmas trees	178,000	172,000	-3%
Natural shade	5,404	6,729	25%
Million square feet under protection			
Greenhouses	895	885	-1%
Plastic film	640	666	4%
Glass covered	123	109	-11%
Rigid plastic	132	111	-16%
Shade structures	430	392	-9%

Top States

Horticulture Operations, 2019

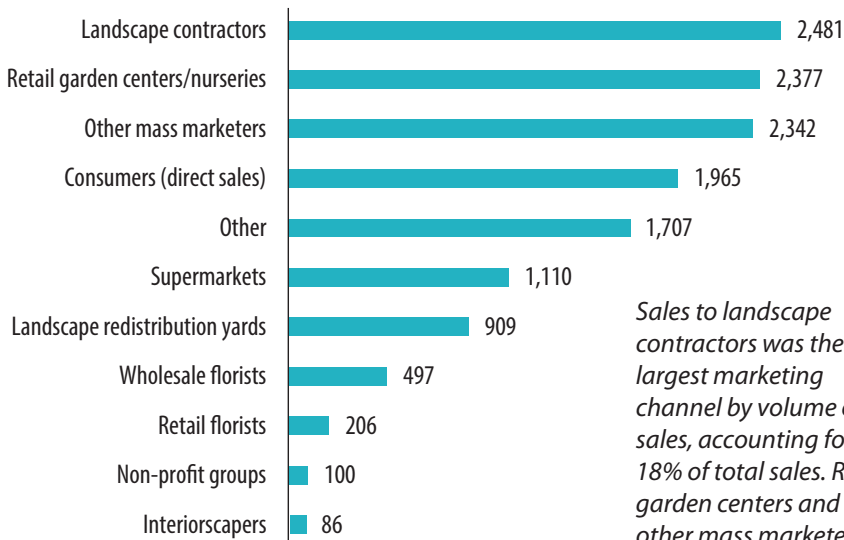
Florida	1,689
Pennsylvania	1,365
California	1,331
Oregon	1,124
Michigan	1,092
New York	978
North Carolina	885
Ohio	854
Wisconsin	789
Washington	699
Texas	614
New Jersey	555

Operation Characteristics

Snapshot: Horticulture, 2014 and 2019

	2014	2019	% Change
No. of operations	23,221	20,655	-11
Total sales (\$ billion)	13.8	13.8	0
Avg. sales per operation (\$ thousands)	594	667	12
Wholesale (as percent of total sales)	86.0	86.0	0
Corporations (as % of total operations)	37.6	37.0	-1
Production expenses (\$ billion)	11.0	11.6	6
No. of operations with hired workers	17,086	14,861	-13
No. of hired workers	274,759	242,695	-12

Marketing Channels Used, 2019 (\$ million)



Sales to landscape contractors was the largest marketing channel by volume of sales, accounting for 18% of total sales. Retail garden centers and other mass marketers accounted for 17% each.

66%

The share of horticultural operations that sold directly to consumers. Retail sales accounted for only 14% of all sales of horticultural products.

Nursery Stock Sales, 2019

	\$ Million	% Change Since 2014
Broadleaf evergreens	853	6
Fruit and nut plants	735	-3
Deciduous shade trees	711	26
Deciduous shrubs	674	0
Coniferous evergreens	652	15
Deciduous flowering trees	377	1
Ornamental grasses	179	13
Woody ornamentals and vines	141	-9
Landscaping palms	133	-13
Cacti and succulents	79	92
Bareroot herbaceous perennials	11	-36
Total Nursery Stock Sales	4,545	7

Nursery stock was the largest horticultural category by value of sales and accounted for 33% of all horticultural sales. Broadleaf evergreens was the largest category of nursery stock sales and accounted for 6% of total horticultural sales.

Expenditures, 2019

	\$ Million	% Change Since 2014
Labor	4,878	10
Seeds, growing media, containers	2,902	5
Fuel, utilities, supplies, repairs	1,369	-8
Rent, interest, taxes	759	9
Other	751	38
Fertilizer and chemicals	675	-9
Marketing and packaging	302	-1
Total	11,636	6

Horticultural operations reported \$11.6 billion in production expenses in 2019.

About the Survey

The 2019 Census of Horticultural Specialties is a Census of Agriculture special study. It includes any operation that produced and sold \$10,000 or more in horticultural specialty products in 2019.

The 2019 data as well as results of previous NASS horticultural surveys are available in the NASS Quick Stats database at quickstats.nass.usda.gov, and as a PDF file publication at www.nass.usda.gov/go/hort.

Operation Characteristics by Sales Class, 2019 (percent of total)

	Operations	Wholesale Sales	Retail Sales	Sales	Expenses	Hired Workers
\$10,000 to \$99,999	58	1	15	3	5	12
\$100,000 to \$499,999	24	6	25	8	10	16
\$500,000 to \$999,999	7	6	13	7	8	10
\$1,000,000 to \$2,499,999	6	14	17	15	15	15
\$2,500,000 +	5	73	30	67	62	47

Operations with \$2.5 million or more in sales accounted for only 5% of total operations but the majority of wholesale sales (73%), total sales (67%), and expenses (62%). Operations with \$10,000 to \$99,999 in sales accounted for 58% of total operations.