2013 - 2014

NURSERY PRODUCTION SURVEY

Scott Enebak

November 2014

2013 - 2014 Survey

- ✓ **Two page questionnaire sent in June to all available nursery addresses in 12 southern states.**
- ✓ **Follow up telephone calls made to maximize participation and update addresses.**
- ✓ **Creation of an Excel data file, then data summary using SAS.**
- ✓ **Report preparation.**

RESULTS

Questionnaire Response

- **Total of 73 surveys sent out.**
- **40 were returned with seedling production numbers.**
- **1 Survey was returned as undeliverable.**
- **19 nurseries were removed from the list.**
    - **No information was located.**
- **13 nurseries did not respond to survey.**
- **6 of those 13 have responded previously.**
    - **Estimated production based on previous data.**
- **47 surveys in data, 3 fewer data points from last year.**

Conifer Production by Stock: 2013-14

	Conifer Production	Percent Change from Last Year
Bareroot Stock	**792,579,000**	**+ 4.1%**
Container Stock	**191,119,000**	**+ 6.4%**
Total Conifer	**983,698,000**	**+ 4.5%**

Table 1, 2 & 3

Conifer Production: 2013-2014

Species	Production	Percent Change from Last Year
Loblolly Pine	755,647,000	+ 5.3 %
Slash Pine	99,831,000	+ 19.5%
Longleaf Pine	110,106,000	- 2.7 %

- 89% of Loblolly pine produced is bareroot stock
- 93% of Slash pine produced is bareroot stock
- 95% of Longleaf pine produced is container stock

Table 1, 2 & 3

Conifer Production: 2013-2014

	2013-14	2012-13	2011-12	2010-11	2009-10	2008-09
Loblolly	77%	76%	75%	80%	79%	83%
Slash	10%	9%	9%	11%	11%	10%
Longleaf	11%	12%	13%	5%	8%	6%
Total	98%	97%	98%	97%	98%	99%

Table 1, 2 & 3

Production by Ownership Category: CONIFERS

	2013-2014		2012-2013	
	Production	Percent	Production	Percent
Bareroot				
State	90,320,000	11	87,586,000	12
Private	337,978,000	43	365,765,000	48
Industry	364,284,000	46	307,991,000	40
Container				
State	9,831,000	5	9,253,000	5
Private	160,168,000	84	152,565,000	85
Industry	21,120,000	11	17,754,000	10

Table 7

RESULTS – Hardwood Production

	Hardwood Production	Percent Change from Last Year
Bareroot Stock	28,703,000	- 24%
Container Stock	1,562,000	- 19%
Total Hardwood	30,265,00	- 24%

Table 4, 5 & 6

RESULTS - Hardwood production

	2013-14	% Change Previous yr	2012-13	% Change Previous yr
Dogwood	386,000	- 52%	817,000	+ 51%
Eucalyptus	1,512,000	- 17%	1,832,000	- 2%
Green Ash	1,461,000	+ 22%	1,189,000	- 58%
Oak	16,544,000	- 31%	24,053,000	+ 2%
Others	7,557,000	+ 12%	6,763,000	+ 7%
Pecan	656,000	- 32%	977,000	+ 16%
Sweetgum	930,000	- 36%	1,472,000	+ 92%
Sycamore	606,000	- 97%	2,294,000	+ 80%
Walnut	178,000	- 7%	192,000	+ 69%
Yellow Poplar	435,000	0%	437,000	+ 10%
Total	30,265,000	- 24%	40,026,000	+ 7%

Table 6

Hardwood Production Over Time

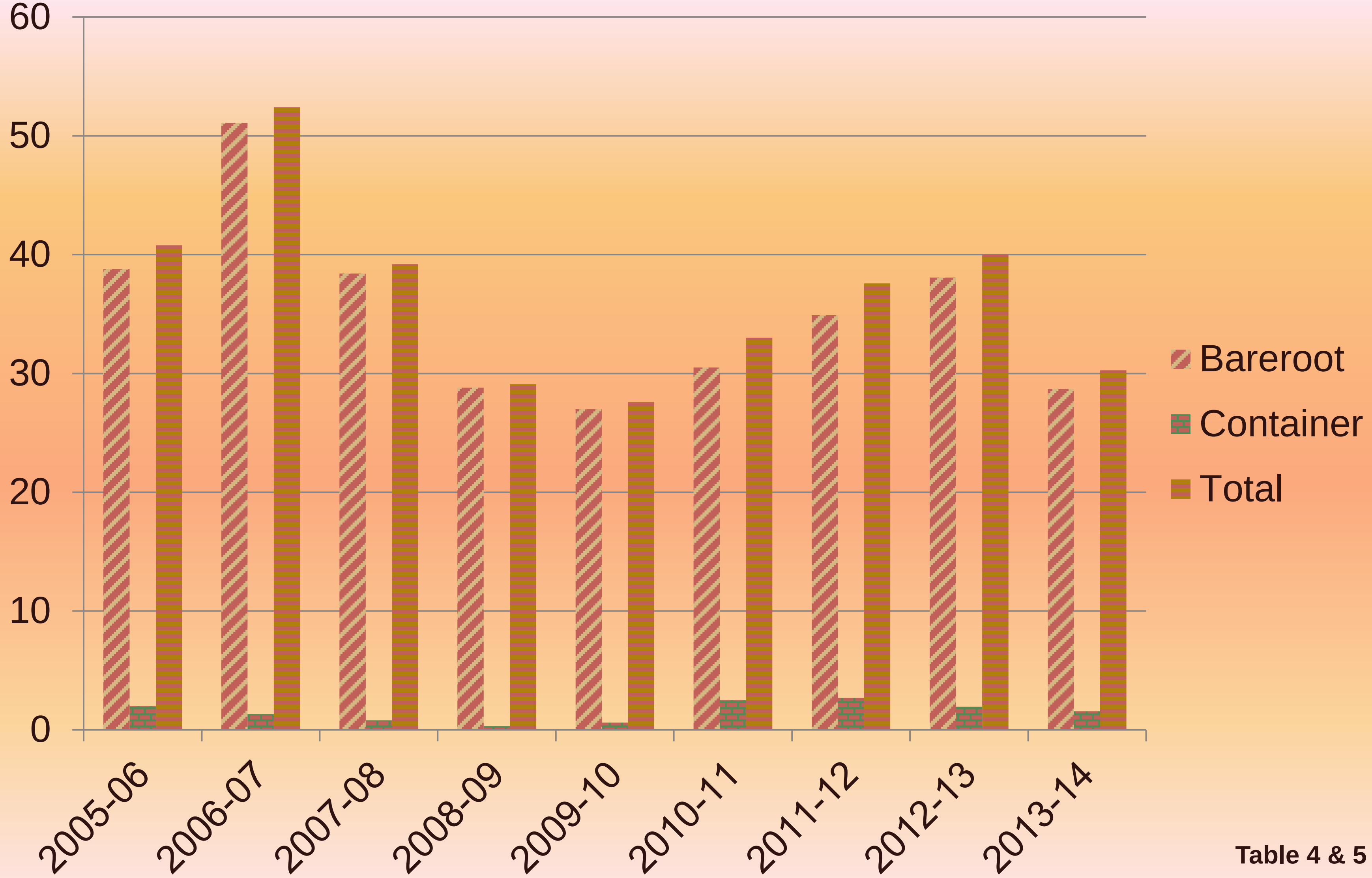


Table 4 & 5

Production by Ownership Category: Hardwoods

	2013-2014		2012-2013	
	Production	Percent	Production	Percent
Bareroot				
State	9,845,000	34	14,240,000	37
Private	16,374,000	57	17,350,000	46
Industry	2,482,000	9	6,488,000	17
Container				
State	17,000	1	17,000	1
Private	1,514,000	97	1,932,000	99
Industry	31,000	2	0	0

Table 7

Production by Ownership Category: ALL SPECIES

	2013-2014			12-13 (MM)	11-12 (MM)	10-11 (MM)	09-10 (MM)
State	110,013,000	11%		11%	13%	13%	14%
Private	516,034,000	51%		55%	48%	46%	50%
Industry	387,917,000	39%		34%	38%	41%	36%
Total	1,013,964,000			980.9	934.7	832.4	816.4

Table 10

Production by State - All species

	2013-2014 Production (x 1000)	Rank	% Change Previous Year	2012-2013 Production (x 1000)	Rank	% Change Previous Year
Alabama	118,015	3	17	101,279	4	15
Arkansas	111,419	4	6	104,877	3	5
Florida	42,456	8	24	34,024	8	-5
Georgia	324,944	1	3	316,125	1	4
Louisiana	14,503	10	-31	20,880	10	-33
Mississippi	83,145	6	-8	90,082	5	2
N. Carolina	72,800	7	11	65,869	7	4
Oklahoma	2,818	12	-29	3,974	12	-6
S. Carolina	123,132	2	0	122,752	2	12
Tennessee	7,603	11	13	6,728	11	-6
Texas	83,891	5	-5	88,280	6	12
Virginia	29,234	9	12	26,072	9	1

Table 11

AU Southern Forest Nursery Management Cooperative Members

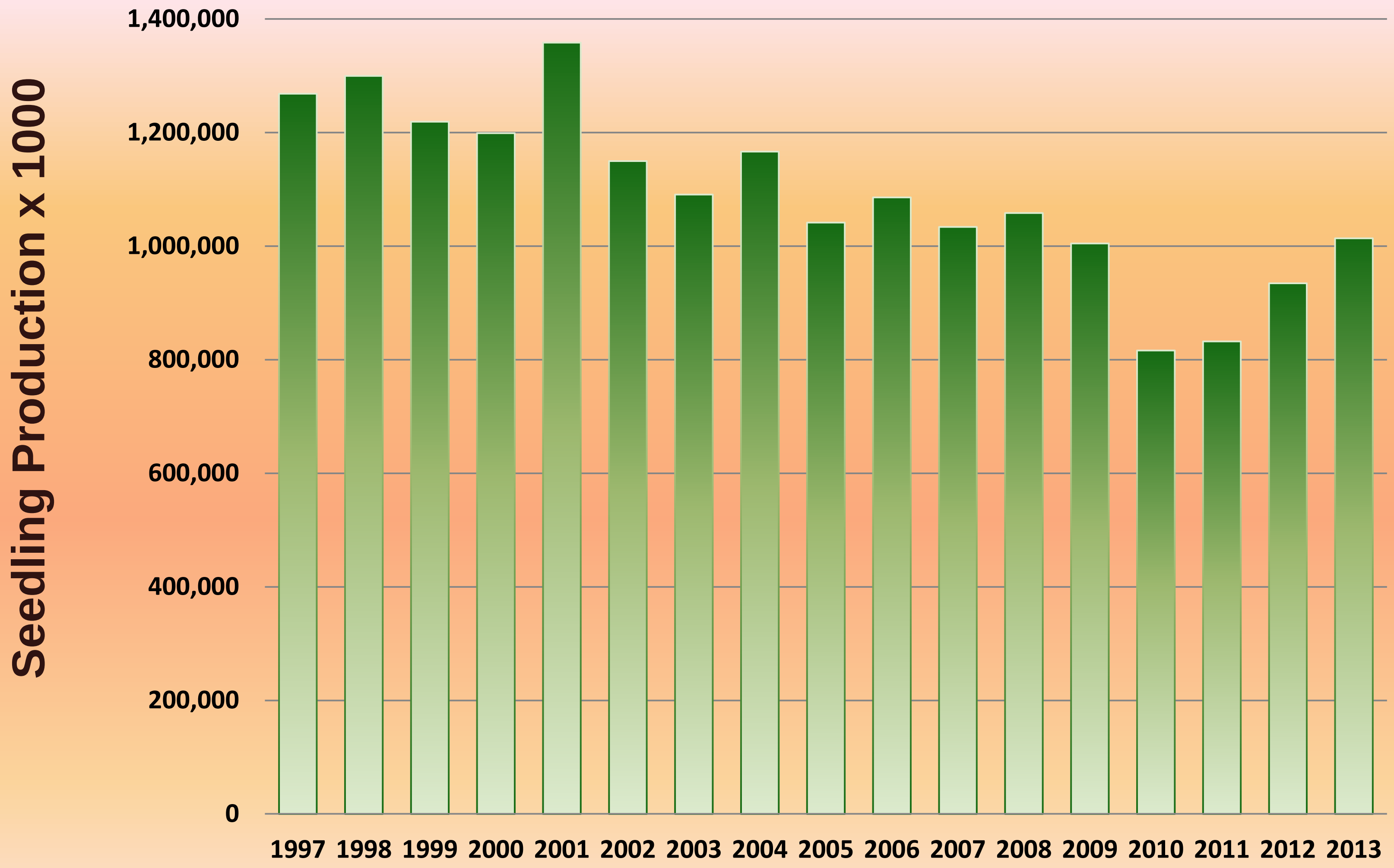
- All species & stock types

Nursery Cooperative Members comprise 82% of all regional seedling production.

Nursery Cooperative Members comprised 88% of bareroot seedlings and 55% of container seedlings.

Table 12

Seedling Production: 1997-2013



Data from USFS, GFC and Nursery Cooperative

2013-14 Seedling Production Survey

1. **After for years of below the magical 1 BILLION mark, regional seedling production was 1,013,964,000 seedlings.**
2. **Seedling production in 2013 is up 3.4% overall across the region from the 2012 planting season. Continues a 4-yr trend of increasing since 2010.**
3. **Regional bareroot conifer production was up 4.1 % and hardwood production decreased significantly; 9.8 MM (-24%) from the 2012 planting season.**
4. **Georgia is the No. 1 seedling producer for conifer and Arkansas is the No. 1 hardwood seedling producer.**
5. **Nursery Cooperative members continue to lead seedling production in the region and have increased it's contribution to container stock production.**
6. **While small private nurseries are responding more favorably to our requests for seedling production, a large portion of private, container producers are not.**