

2014 - 2015

NURSERY PRODUCTION
SURVEY

Scott Enebak
November 2015

2014 - 2015 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 56 surveys sent out.**
- **42 were returned with seedling production numbers.**
- **14 nurseries did not respond to survey.**
- **11 of those 14 nurseries had responded to our requests in previous years.**
 - **Estimated seedling production of 11 nurseries based on previous data.**
- **53 surveys in data, 4 more data points than last year.**

Conifer Production by Stock: 2014-15

	Conifer Production	Percent Change from Last Year
Bareroot Stock	795,085,000	+ 0.3%
Container Stock	208,055,000	+ 8.8%
Total Conifer	1,003,137,000	+ 1.2%

Table 1, 2 & 3

Conifer Production: 2014-2015

Species	Production	Percent Change from Last Year
Loblolly Pine	778,057,000	+ 2.9 %
Slash Pine	100,710,000	+ 0.8 %
Longleaf Pine	107,757,000	- 2.7 %

- 89% of Loblolly pine produced is bareroot stock
- 90% of Slash pine produced is bareroot stock
- 97% of Longleaf pine produced is container stock

Conifer Production: 2014-2015

	2014-15	2013-14	2012-13	2011-12	2010-11	2009-10
Loblolly	78%	77%	76%	75%	80%	79%
Slash	10%	10%	9%	9%	11%	11%
Longleaf	11%	11%	12%	13%	5%	8%
Total	99%	98%	97%	98%	97%	98%

Table 1, 2 & 3

Production by Ownership Category: CONIFERS

	2014-2015		2013-2014	
	Production	Percent	Production	Percent
Bareroot				
State	78,533,000	10	90,320,000	11
Private	386,864,000	49	337,978,000	43
Industry	329,683,000	41	364,284,000	46
Container				
State	9,732,000	5	9,831,000	5
Private	182,837,000	88	160,168,000	84
Industry	15,486,000	7	21,120,000	11

Table 7

RESULTS – Hardwood Production

	Hardwood Production	Percent Change from Last Year
Bareroot Stock	27,279,000	- 5%
Container Stock	804,000	- 48%
Total Hardwood	28,083,000	- 7%

Table 4, 5 & 6

RESULTS - Hardwood production

	2014-15	% Change Previous yr	2013-14	% Change Previous yr
Dogwood	402,000	+ 4%	386,000	- 52%
Eucalyptus	502,000	- 67%	1,512,000	- 17%
Green Ash	907,000	- 38%	1,461,000	+ 22%
Oak	18,210,000	+10%	16,544,000	- 31%
Others	5,437,000	- 28%	7,557,000	+ 12%
Pecan	712,000	+ 8%	656,000	- 32%
Sweetgum	571,000	- 38%	930,000	- 36%
Sycamore	621,000	+3%	606,000	- 97%
Walnut	158,000	- 11 %	178,000	- 7%
Yellow Poplar	563,000	+29 %	435,000	0%
Total	28,083,000	- 7%	30,265,000	- 24%

Table 6

Hardwood Production: 2005-2014

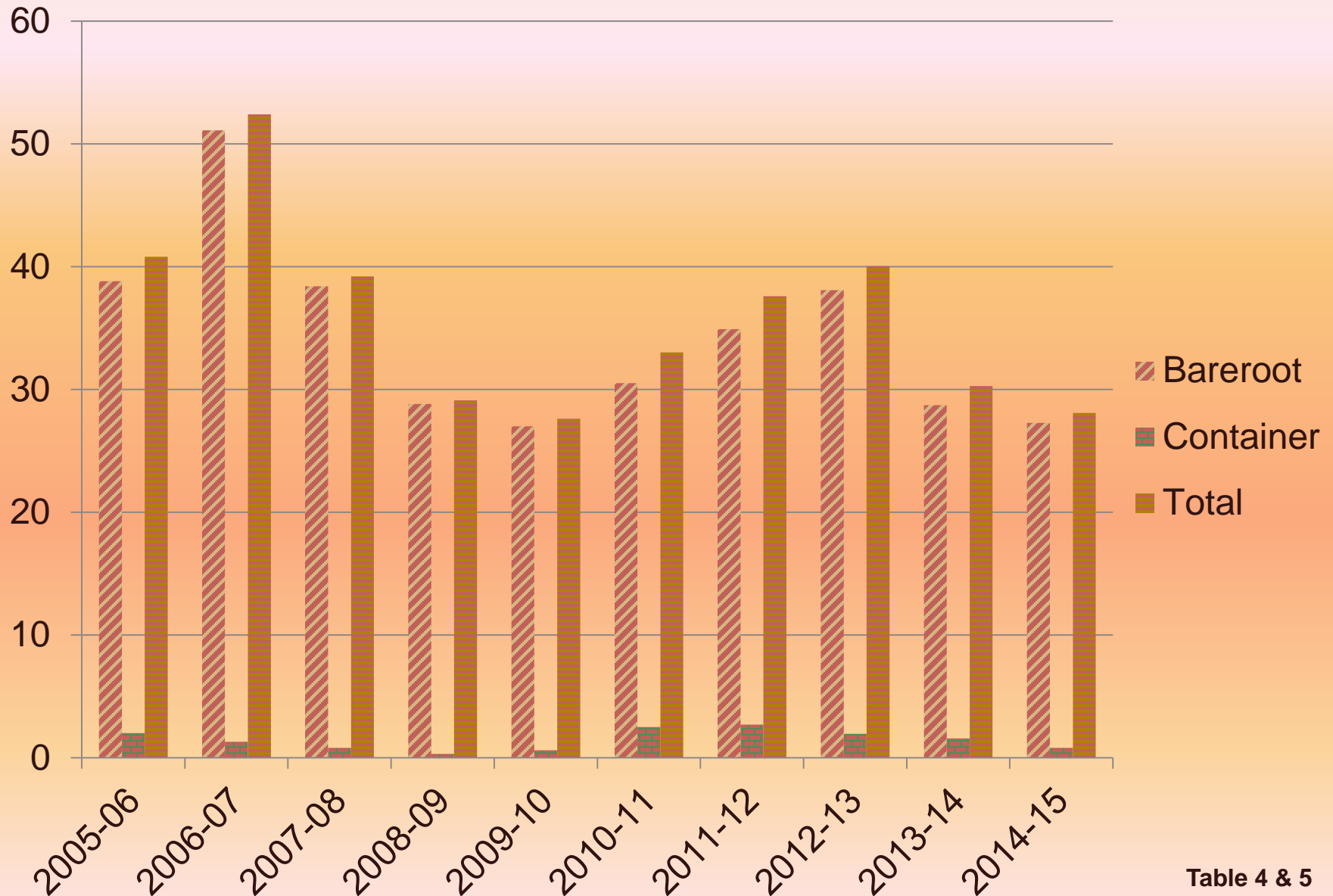


Table 4 & 5

Production by Ownership Category: Hardwoods

	2014-2015		2013-2014	
	Production	Percent	Production	Percent
Bareroot				
State	12,544,000	46	9,845,000	34
Private	11,149,000	41	16,374,000	57
Industry	3,723,000	14	2,482,000	9
Container				
State	8,000	1	17,000	1
Private	796,000	99	1,514,000	97
Industry	1,000	0	31,000	2

Table 7

Production by Ownership Category: ALL SPECIES

	2014-2015			13-14 (MM)	12-13 (MM)	11-12 (MM)	10-11 (MM)
State	100,815,000	10%		11%	11%	13%	13%
Private	581,646,000	56%		51%	55%	48%	46%
Industry	348,891,000	34%		39%	34%	38%	41%
Total	1,031,352,000			1,013.9	980.9	934.7	832.4

Table 10

Production by State - All species

	2014-2015 Production (x 1000)	Rank	% Change Previous Year	2013-2014 Production (x 1000)	Rank	% Change Previous Year
Alabama	123,473	3	5	118,015	3	17
Arkansas	107,203	4	-4	111,419	4	6
Florida	36,602	8	-14	42,456	8	24
Georgia	341,685	1	5	324,944	1	3
Louisiana	22,185	10	53	14,503	10	-31
Mississippi	81,353	6	-2	83,145	6	-8
N. Carolina	66,391	7	-9	72,800	7	11
Oklahoma	2,871	12	2	2,818	12	-29
S. Carolina	130,511	2	6	123,132	2	0
Tennessee	7,138	11	-6	7,603	11	13
Texas	81,584	5	-3	83,891	5	-5
Virginia	30,356	9	4	29,234	9	12

Table 11

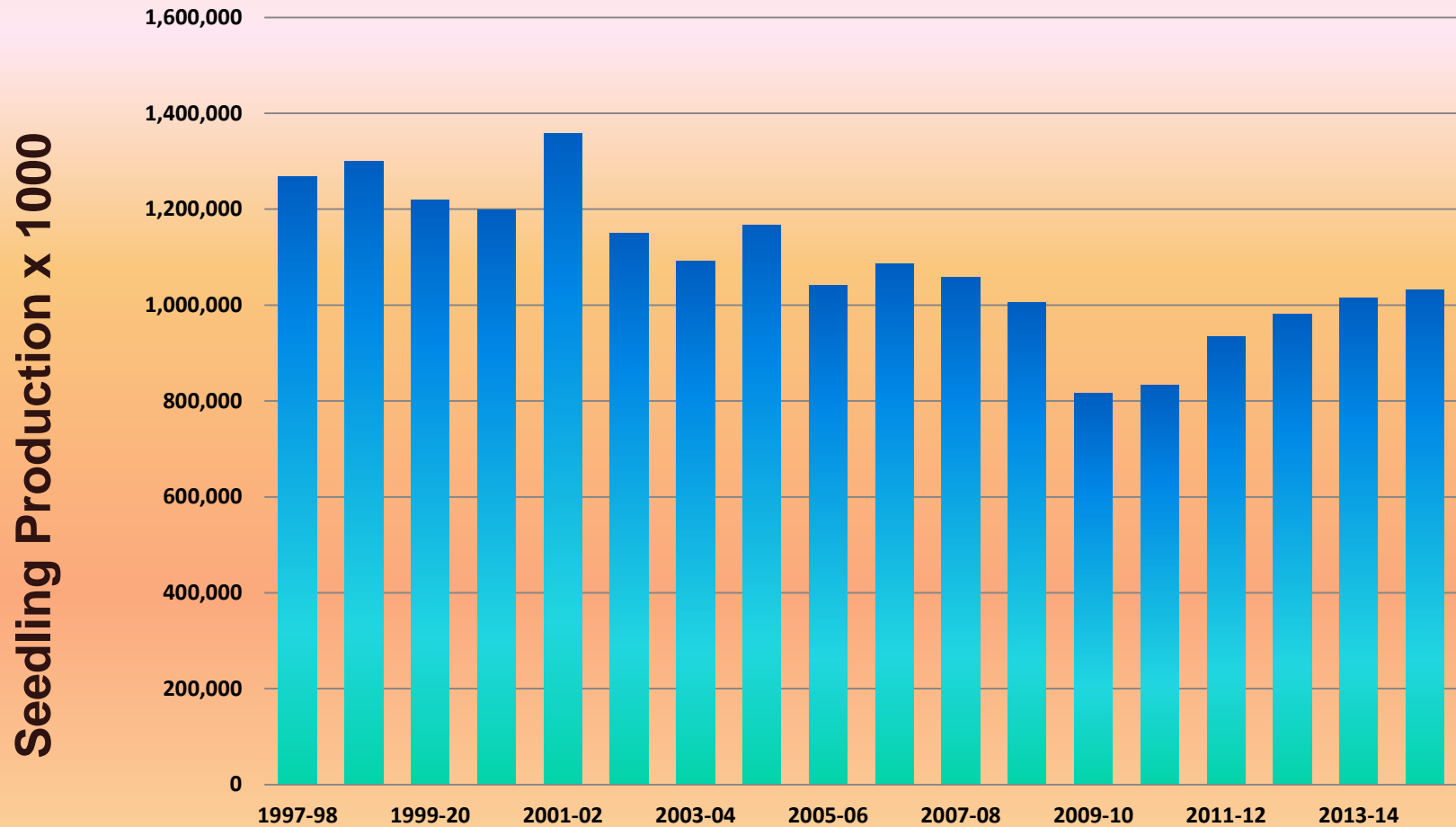
AU Southern Forest Nursery Management Cooperative Members

- All species & stock types

Nursery Cooperative Members comprise 83% of all regional seedling production.

Nursery Cooperative Members comprised 90% of bareroot seedlings and 52% of container seedlings.

Seedling Production: 1997-2014



Data from USFS, GFC and Nursery Cooperative

2014-15 Seedling Production Survey

1. After four years of below the magical 1 BILLION mark, regional seedling production was up again with 1,031,355,000 seedlings.
2. Seedling production in 2014 is up 2.4% overall across the region from the 2012 planting season. Continues a 5-yr trend of increasing since 2010.
3. Regional bareroot conifer production was up 0.2 % and hardwood production decreased significantly; 2.0 MM (-7%) from the 2014 planting season.
4. Georgia is the No. 1 seedling producer for conifer (346.4 MM) and Arkansas is the No. 1 hardwood (12.0 MM) 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.

