

2015 - 2016
NURSERY PRODUCTION
SURVEY

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November 2016

2015 - 2016 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 58 surveys sent out.
 - 41 were returned with seedling production numbers.
 - 17 nurseries did not respond to survey.
 - 11 of those 17 nurseries had responded to our requests in previous years.
 - Estimated seedling production of 11 nurseries based on previous years' data & Longleaf Alliance Data
 - 51 surveys in data, 2 fewer data points than last year.
- Louisiana State Nurseries no longer in production

Conifer Production by Stock: 2015-16

	Conifer Production	Percent Change from Last Year
Bareroot Stock	806,024,000	+ 1.3%
Container Stock	204,402,000	- 1.3%
Total Conifer	1,003,137,000	+ 0.8%

Table 1, 2 & 3

Conifer Production: 2015-2016

Species	Production	Percent Change from Last Year
Loblolly Pine	782,337,000	+ 0.5 %
Slash Pine	112,045,000	+ 10.1 %
Longleaf Pine	98,508,000	- 9.3 %

- 88% of Loblolly pine produced is bareroot stock
- 87% of Slash pine produced is bareroot stock
- 97% of Longleaf pine produced is container stock

Conifer Production: 2015-2016

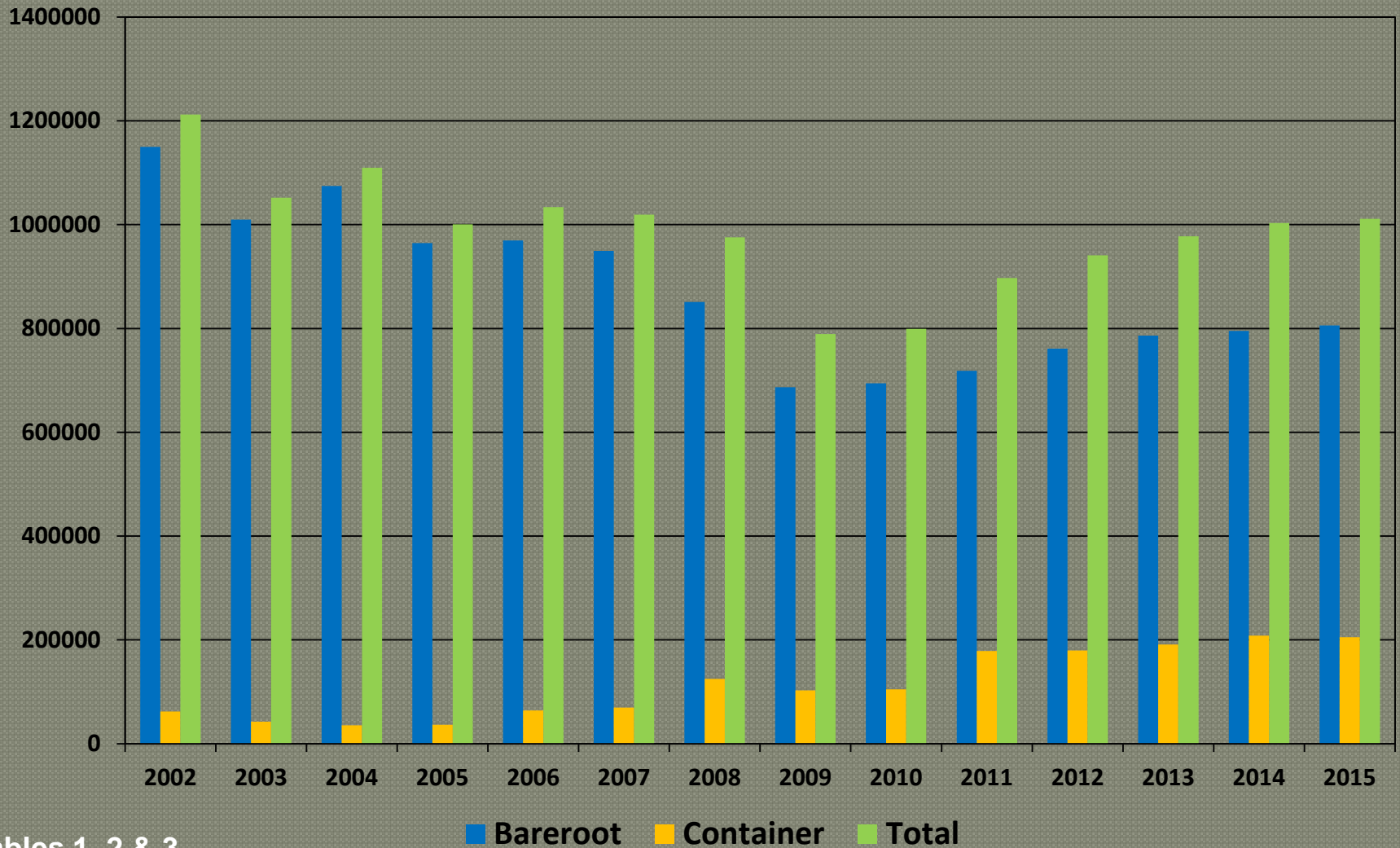
	2015-16	2014-15	2013-14	2012-13	2011-12	2010-11
Loblolly	77%	78%	77%	76%	75%	80%
Slash	10%	10%	10%	9%	9%	11%
Longleaf	11%	11%	11%	12%	13%	5%
Total	98%	99%	98%	97%	98%	97%

Production by Ownership Category: CONIFERS

	2015-2016		2014-2015	
	Production	Percent	Production	Percent
Bareroot				
State	72,239,000	9	78,533,000	10
Private	419,960,000	65	386,864,000	49
Industry	313,822,000	26	329,683,000	41
Container				
State	7,459,000	4	9,732,000	5
Private	177,694,000	91	182,837,000	88
Industry	20,250,000	5	15,486,000	7

Table 7

CONIFER Production by Stock Type: 2002-2015



Tables 1, 2 & 3

Hardwood Production

	2015-2016		2014-2015		2014-2013	
	Numbers	Percent Change	Numbers	Percent Change	Numbers	Percent Change
Bareroot Stock	22,717,000	- 20%	27,279,000	- 5%	28,703,000	- 24%
Container Stock	395,000	- 103%	804,000	- 48%	1,562,000	- 19%
Total Hardwood	22,112,000	- 27%	28,083,000	- 7%	30,265,00	- 24%

Table 4, 5 & 6

RESULTS - Hardwood production

	2015-16	% Change Previous yr	2014-15	% Change Previous yr
Dogwood	448,000	+ 10%	402,000	+ 4%
Eucalyptus	0		502,000	- 67%
Green Ash	609,000	- 49%	907,000	- 38%
Oak	1,4217,000	- 28%	18,210,000	+10%
Others	4,637,000	-17%	5,437,000	- 28%
Pecan	634,000	-12%	712,000	+ 8%
Sweetgum	1,227,000	+51%	571,000	- 38%
Sycamore	544,000	-14%	621,000	+3%
Walnut	84,000	-88%	158,000	- 11 %
Yellow Poplar	712,000	+21%	563,000	+29 %
Total	23,112,000	-22%	28,083,000	- 7%

Table 6

Hardwood Production: 2005-2015



Table 4 & 5

Production by Ownership Category: Hardwoods

	2015-2016		2014-2015		2013-2014	
	Production	Percent	Production	Percent	Production	Percent
Bareroot						
State	7,949,000	35	12,544,000	46	9,845,000	34
Private	12,224,000	58	11,149,000	41	16,374,000	57
Industry	2,543,000	7	3,723,000	14	2,482,000	9
Container						
State	12,000	3	8,000	1	17,000	1
Private	383,000	97	796,000	99	1,514,000	97
Industry	0	0	1,000	0	31,000	2

Table 7

Production by Ownership Category: ALL SPECIES

	2015-2016			14-15 (MM)	13-14 (MM)	12-13 (MM)	11-12 (MM)
State	87,660,000	8%		10%	11%	11%	13%
Private	610,261,000	59%		56%	51%	55%	48%
Industry	336,615,000	33%		34%	39%	34%	38%
Total	1,034,537,000			1,031.3	1,013.9	980.9	934.7

Table 10

Production by State - All species

	2015-2016 Production (× 1000)	Rank	% Change Previous Year	2014-2015 Production (× 1000)	Rank	% Change Previous Year
Alabama	116,002	3	-6	123,473	3	5
Arkansas	98,819	4	-8	107,203	4	-4
Florida	60,438	8	65	36,602	8	-14
Georgia	334,834	1	-2	341,685	1	5
Louisiana	23,735	10	7	22,185	10	53
Mississippi	84,048	5	3	81,353	6	-2
N. Carolina	65,838	7	-1	66,391	7	-9
Oklahoma	1,313	12	-54	2,871	12	2
S. Carolina	139,304	2	7	130,511	2	6
Tennessee	7,438	11	4	7,138	11	-6
Texas	71,728	6	-12	81,584	5	-3
Virginia	31,040	9	2	30,356	9	4

Table 11

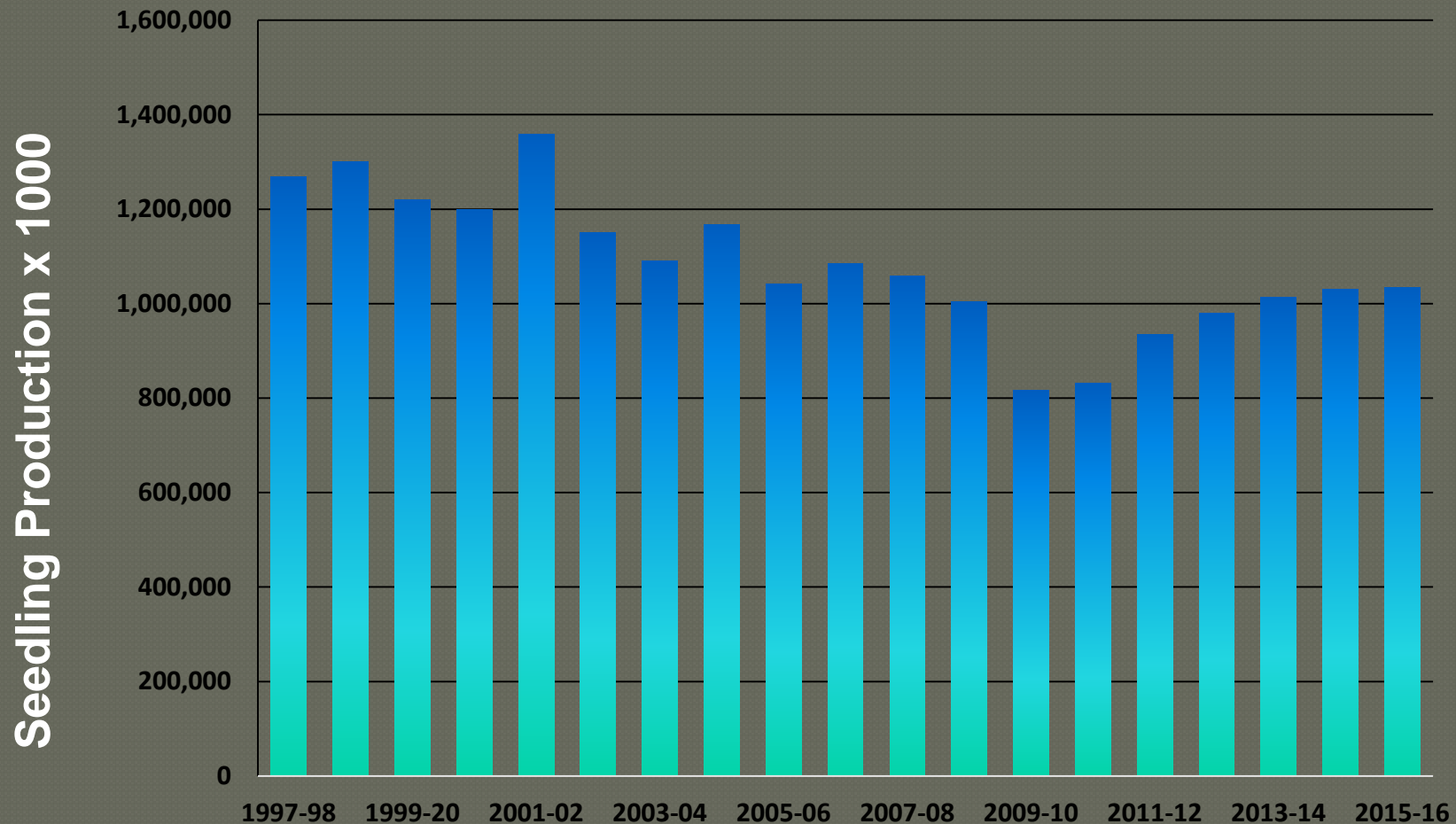
AU Southern Forest Nursery Management Cooperative Members

- All species & stock types

Nursery Cooperative Members comprise 81% of all regional seedling production.

Nursery Cooperative Members comprised 86% of bareroot seedlings and 59% of container seedlings.

Seedling Production: 1997-2015



2015-16 Seedling Production Survey

1. After four years of below the magical 1 BILLION mark, regional seedling production was up again with 1,034,535,000 seedlings.
2. Seedling production in 2015 is up 0.3% overall across the region from the 2012 planting season. Continues a 6-yr trend of increasing since 2010.
3. Regional bareroot conifer production was up 0.8 % and hardwood production decreased significantly; 6.0 MM (-27%) from the 2015 planting season; 22 MM/2015, 28 MM/2014, 30 MM in 2013
4. Georgia is the No. 1 seedling producer for conifer (334.8 MM) and Arkansas is the No. 1 hardwood (9.2 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.

