

2017 - 2018

FOREST TREE NURSERY SEEDLING PRODUCTION SURVEY



Scott Enebak
November 2018

2017 - 2018 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.
- 46 were returned with seedling production numbers.
- 12 nurseries did not respond to survey.
- 6 of those 12 nurseries had responded to our requests in previous years.
- 52 surveys in data, 1 more data point than last year.

Conifer Production by Stock: 2017-18

	Conifer Production	Percent Change from Last Year
Bareroot Stock	824,245,000	- 0.5%
Container Stock	215,480,000	+1.7%
Total Conifer	1,039,725,000	-0.1%

Conifer Production: 2017-2018

Species	Production	Percent Change from Last Year
Loblolly Pine	820,705,000	+ 1.0 %
Slash Pine	104,194,000	- 9.0 %
Longleaf Pine	92,017,000	- 1.0 %

- 85% of Loblolly pine produced is bareroot stock
- 87% of Slash pine produced is bareroot stock
- 85% of Longleaf pine produced is container stock

Conifer Production: 2017-2018

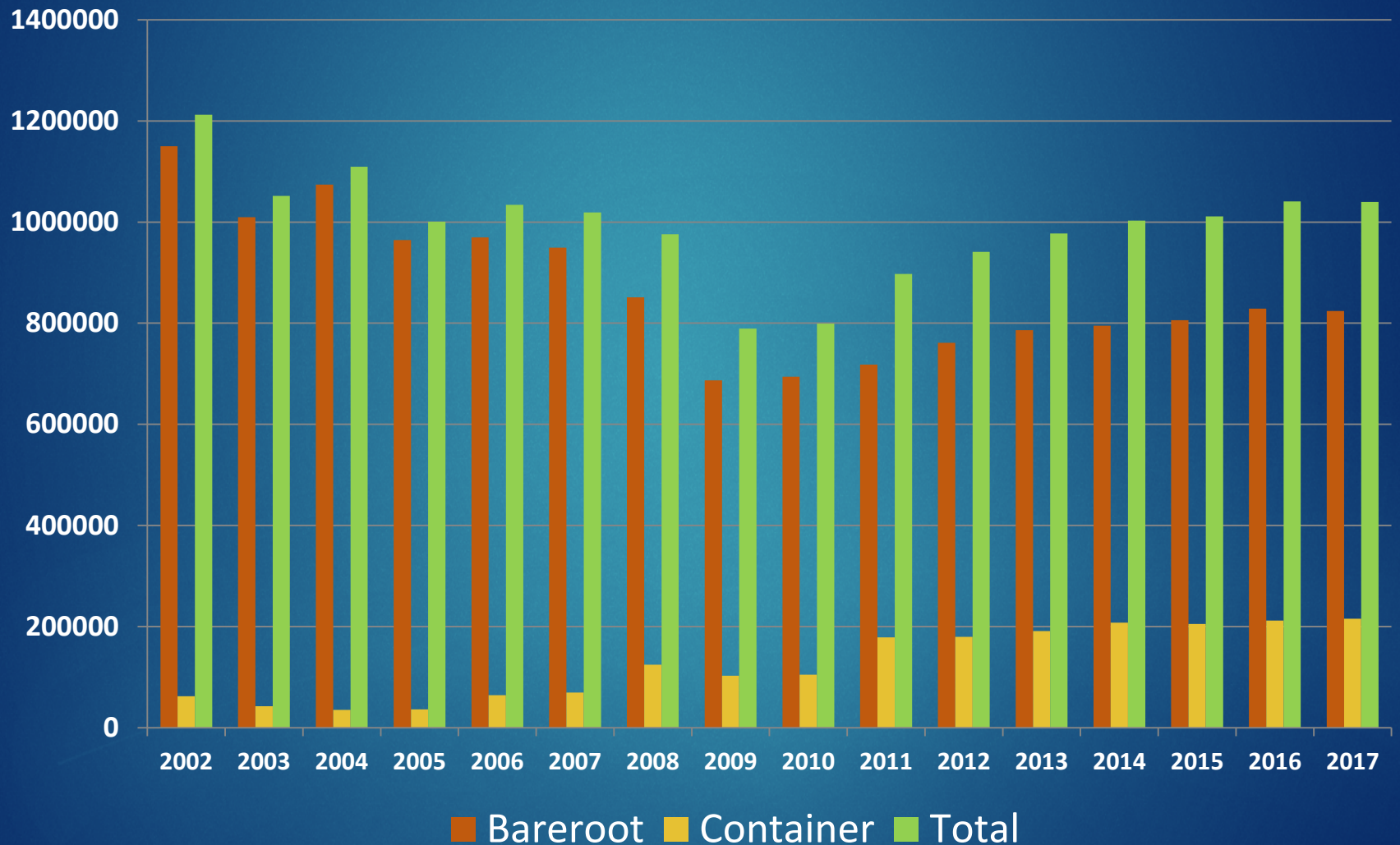
	2017-18	2016-17	2015-16	2014-15	2013-14	2012-13
Loblolly	79%	78%	77%	78%	77%	76%
Slash	10%	11%	10%	10%	10%	9%
Longleaf	09%	09%	11%	11%	11%	12%
Total	98%	98%	98%	99%	98%	97%

Production by Ownership Category: CONIFERS

	2017-2018		2016-2017	
	Production	Percent	Production	Percent
Bareroot				
State	86,622,000	10	78,029,000	9
Private	522,628,000	62	369,529,000	45
Industry	237,464,000	28	381,472,000	46
Container				
State	7,746,000	4	8,127,000	4
Private	191,036,000	89	180,917,000	85
Industry	17,022,000	08	22,726,000	11

Table 7

CONIFER Production by Stock Type: 2002-2017



Hardwood Production

	2017-2018		2016-2017		2015-2016	
	Numbers	Percent Change	Numbers	Percent Change	Numbers	Percent Change
Bareroot Stock	22,467,000	-5.0%	23,596,000	+3.8%	22,717,000	- 17%
Container Stock	323,000	-40%	535,000	+64%	395,000	- 51%
Total Hardwood	22,790,000	-6.0%	24,131,000	+9.1	22,112,000	- 21%

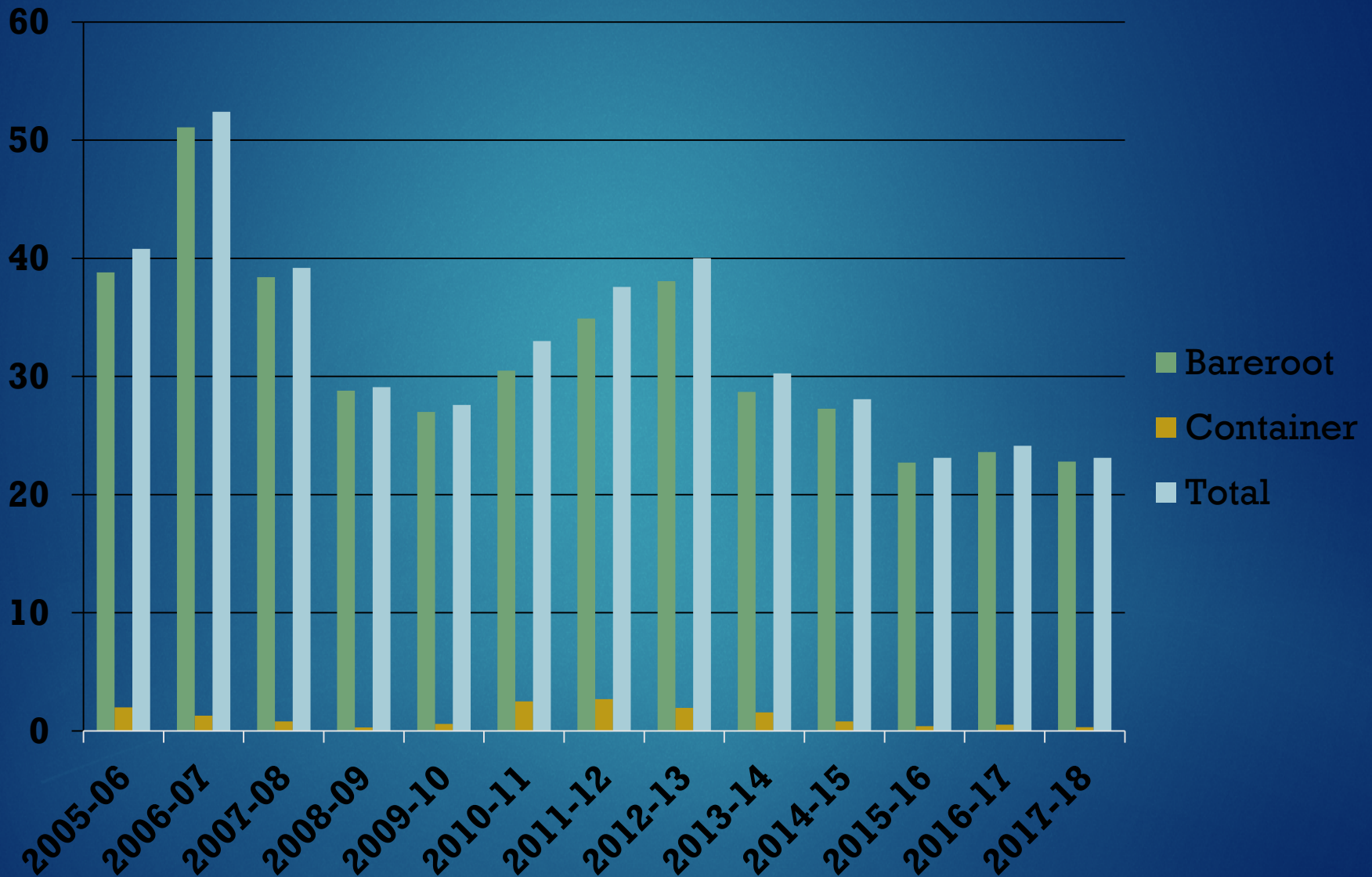
Table 4, 5 & 6

RESULTS - Hardwood production

	2017-18	% Change Previous yr	2016-17	% Change Previous yr
Dogwood	407,000	+16%	351,000	- 21%
Eucalyptus			175,000	
Green Ash	552,000	+4%	531,000	-12%
Oak	13,951,000	-7%	15,025,000	+ 5%
Others	4,686,000	-14%	5,466,000	+ 17 %
Pecan	381,000	-28%	528,000	- 16 %
Sweetgum	1,183,000	+26%	936,000	- 23%
Sycamore	868,000	+57%	552,000	+ 2%
Walnut	114,000	+44%	79,000	- 6%
Yellow Poplar	648,000	+33%	488,000	-31%
Total	22,790,000	-6%	24,131,000	+ 4%

Table 6

Hardwood Production: 2005-2017



Production by Ownership Category: Hardwoods

	2017-2018		2016-2017		2015-2016	
	Production	Percent	Production	Percent	Production	Percent
Bareroot						
State	8,302,000	37	9,078,000	38	7,949,000	35
Private	14,132,000	62	11,770,000	50	12,224,000	58
Industry	34,000	1	2,745,000	12	2,543,000	7
Container						
State	2,000	1	4,000	1	12,000	3
Private	321,000	99	531,000	99	383,000	97
Industry	0	0	0	0	0	0

Table 7

Production by Ownership Category: ALL SPECIES

	2017-2018			16-17 (MM)	15-16 (MM)	14-15 (MM)	13-14 (MM)
State	94,368,000	9%		9%	8%	10%	11%
Private	713,664,000	67%		53%	59%	56%	51%
Industry	254,486,000	24%		38%	33%	34%	39%
Total	1,062,518,000			1,069.9	1,034.5	1,031.3	1,013.9

Table 10

Production by State - All species

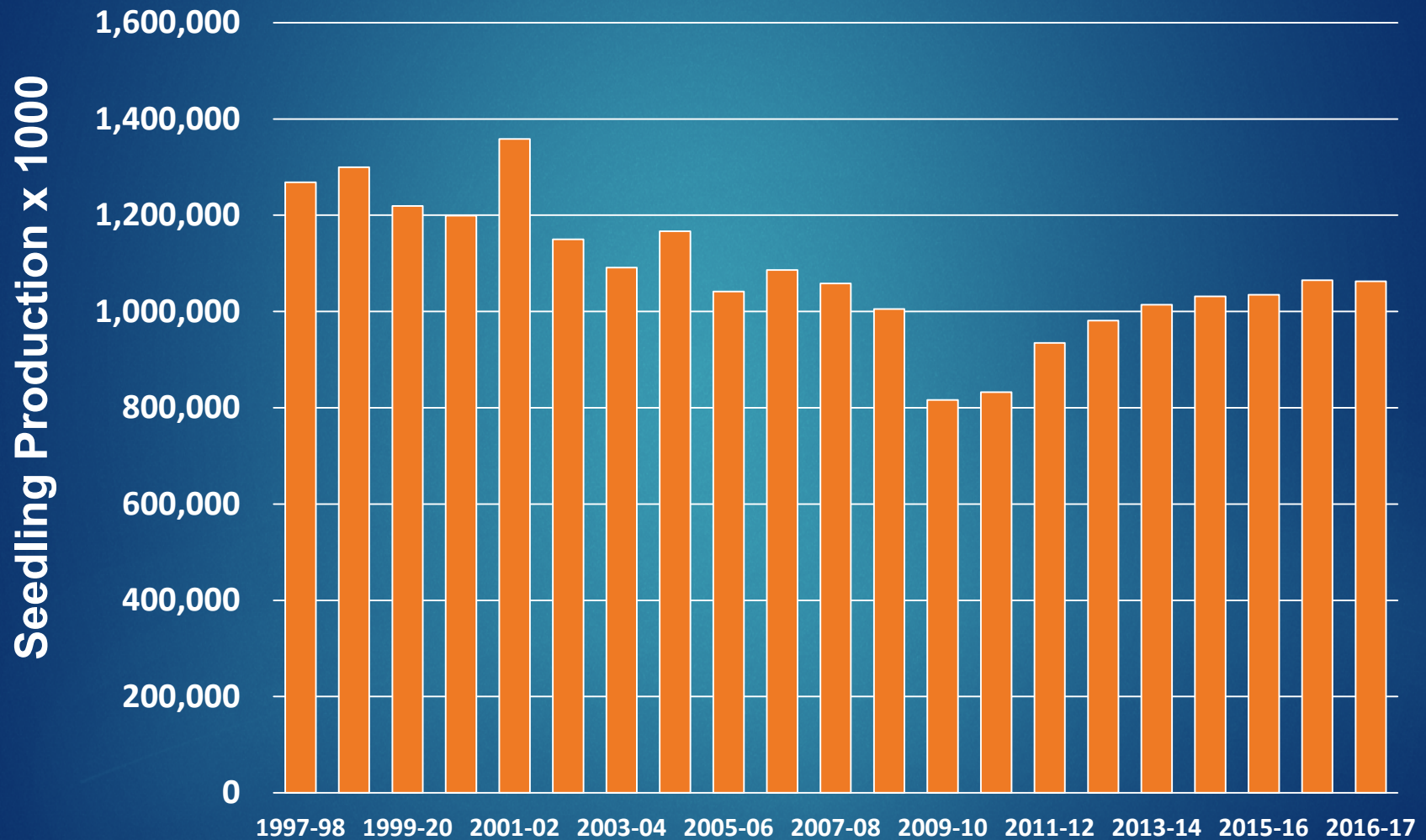
	2017-2018 Production (x 1000)	Rank	% Change Previous Year	2016-2017 Production (x 1000)	Rank	% Change Previous Year
Alabama	93,323	4	-12	106,116	3	-9
Arkansas	104,535	3	6	98,277	4	-1
Florida	59,601	8	1	59,056	8	-2
Georgia	331,099	1	-6	352,661	1	5
Louisiana	46,599	9	38	33,707	10	42
Mississippi	89,019	5	3	86,455	5	3
N. Carolina	68,258	7	-8	73,852	7	12
Oklahoma	3,847	12	-21	4,845	12	269
S. Carolina	142,146	2	9	130,289	2	-6
Tennessee	5,451	11	-7	5,887	11	-21
Texas	87,498	6	12	78,420	6	9
Virginia	31,140	10	-12	35,369	9	14

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 88% of bareroot seedlings and 66% of container seedlings.

Seedling Production: 1997-2017



Data from USFS, GFC and Nursery Cooperative

2017-18 Seedling Production Survey

1. Regional seedling production was down 2 million seedlings from last year, but still above the magical 1 BILLION mark with 1,062,516,000 seedlings.
2. Seedling production in 2017-2018 was down 0.2% overall across the region from the 2016-2017 planting season.
3. Regional bareroot conifer production is down 0.5 % and hardwood production decreased slightly again; 2.0 MM from the previous planting season.
4. Georgia is the No. 1 seedling producer for conifer (331.0 MM) and Arkansas is the No. 1 hardwood (9.1 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.

