



# 2023 USLGA Harvest Survey Presentation

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Education & Research  
Committee

# Agenda

- Welcome
- Abstract
- Demographics
- Harvest Production
- Farm Operations
- Revenues & Profitability
- Resources and Educational Interests
- Survey Highlights
- Questions & Answers



# Abstract

**The United States Lavender Growers Association (USLGA) harvest production survey was conducted in Fall 2023. Based on 596 current USLGA members, the 240 survey respondents yielded a response rate of 34.9%, with 86.6% of this representing current members.**

**Demographics** showed the Northeast region had the most survey participants, however, according to the survey, the states that reported the most lavender farms are Oregon, California, Washington, Michigan, and Virginia. Respondent years in farm production are represented by the following grower categories including 52% Starts Ups (0-3 years), 42% Growth (4-15 years), 5% Established (16-30 years), 1% Heritage (40+). More than 60% of survey respondents are age 45-64.

**Farm operations** are still, most commonly, supported by family, friends, and volunteers, in fact, our survey showed 90% of respondents use family members to support their farms, with 42% reporting that they engage 2 family members. Harvest data by the two hundred and forty (240) growers focused on L. angustifolia Grosso, L. intermedia Lavandin, and other cultivars depending on their business objectives. Survey respondents report over two hundred and forty thousand (240,000+) **plants in production**, with Lavandin harvested in pounds at levels 2X (two times) that of Angustifolia, yet Angustifolia growers reported nearly 1.5X (one and half times) the bundle counts of Lavandin producers. In our survey, Grosso leads reporting for **distillation** purposes with forty-three (43%) percent of total production, however, it's important to note that only 10% reported lavender harvested for distillation. Nine (9%) percent of survey respondents reported eighty-three (83) gallons of lavender **essential oil**, for perspective, this amount can fill one 3000-gallon tanker. Forty-seven (47%) percent of the lavender reported for Essential Oil is made from Grosso, the essential oil reported was two thousand four hundred and eighty gallons (2480 gallons or 9387 liters). We calculated the ratio of **hydrosol** to essential oil production is 30 (hydrosol) to 1 (essential oil). For **culinary** lavender, twenty-five (25%) percent was the most frequently reported percentage of fresh Angustifolia bundles harvested for culinary use. However overall, 50% was the average reported for culinary use, indicating several respondents allocate one hundred (100%) percent of their fresh Angustifolia as culinary.

**Product offerings** reported by respondents show Dried bud (45%), Fresh (40%), Personal care (31%), Home products (29%), Culinary (26%), Essential Oil (22%), Hydrosol (21%), Agritourism (21%), Event hosting (19%), Potted Plants (19%), Lavender theme products (18%), and Educational Seminars and Workshops (11%). For **agritourism**, our survey respondents welcomed over eighty-six thousand (86,267) visitors to their farms in 2023, in aggregate, resulting in 1327 visitors per farm. The Northeast region led in agritourism, and in the number of visitors. **Marketing and sales** reported by respondents show the following as most successful activities: Direct from Farm Sales (29%), Online (25%), Word of mouth/email (21%), Festivals (19%), Farmers Markets (18%), Agritourism (14%), social media (12%), Retail store (13%), Other (9%), and Print Ads (2%).

**Revenue** reported by 65 respondents resulted in \$3.43 million, which is approximately \$52,700 per respondent lavender farm in the year of 2023. The Northeast reported the highest revenues of \$1,163,750 with the Northwest closely following \$1,145,500 and remaining regions collectively achieving \$1,120,750 in revenues in 2023.



# Demographic Survey Questions



- What state is your lavender farm/lavender business located in?
- If your farm is outside the U.S.A., please write in the box
- How many years have you been operating a lavender farm/lavender business?
- Are you a current USLGA member?
- If you would like a copy of the results of the survey, enter your email address.
- Would you like to receive information regarding becoming a member?
- Check the reason that would inspire you the most to join USLGA.
- What is your Region? If you are unsure, check our map at USLGA Region Info Overview (<https://uslga.memberclicks.net/uslga-region-info>).



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# Demographic Data

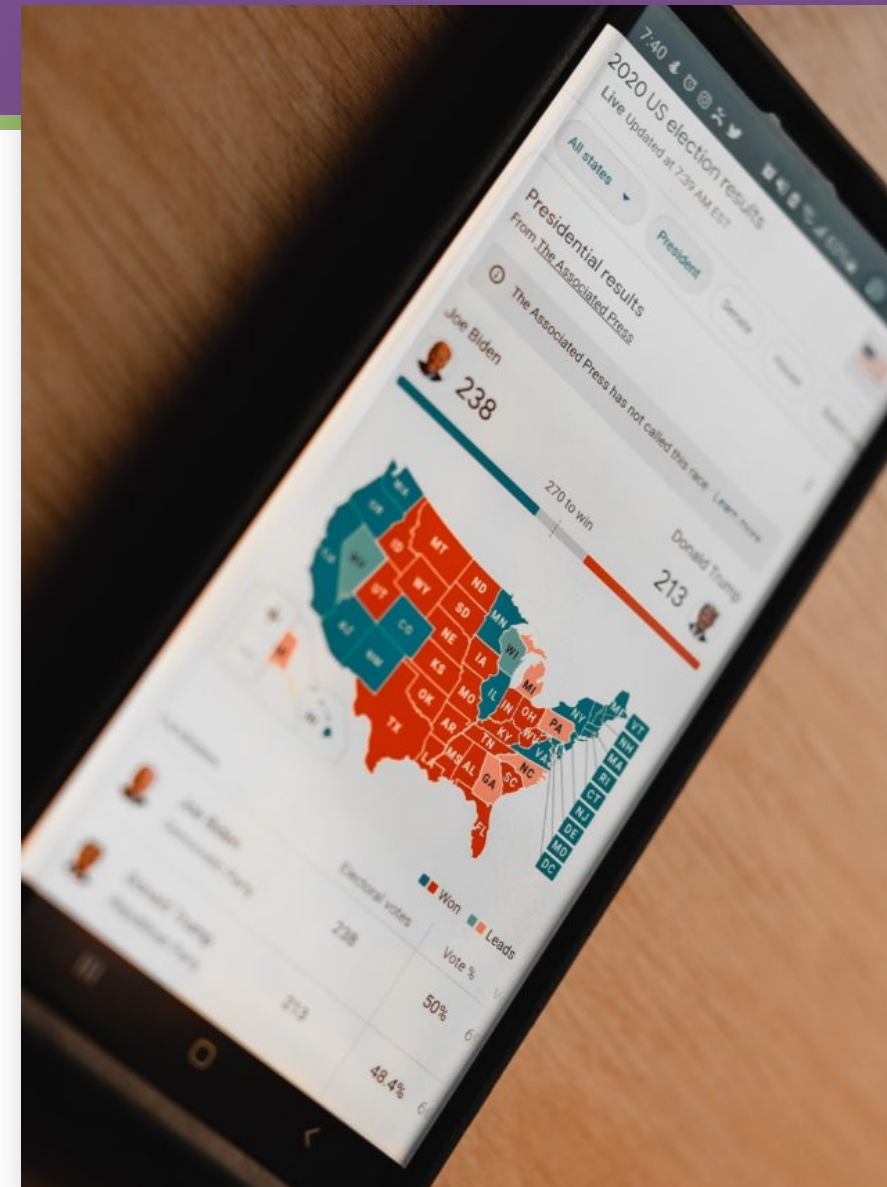
**86.6%** of respondents are **current USLGA members** (n=208)

- **52%** are in **“Start-up”** mode 0-3 yrs. (n=124)
- **42%** are in **“Growth”** mode 4-15 yrs. (n=101)
- **5%** are **“Established”** 16-30yrs. (n=13)
- **1%** are **“Heritage”** >40yrs. (n=2)

<u>Age</u>	<u>Count</u>	<u>% representation</u>
18-24	1	0.4%
25-34	5	2.1%
35-44	20	8.5%
45-54	60	25.5%
55-64	88	37.4%
65+	61	26.0%

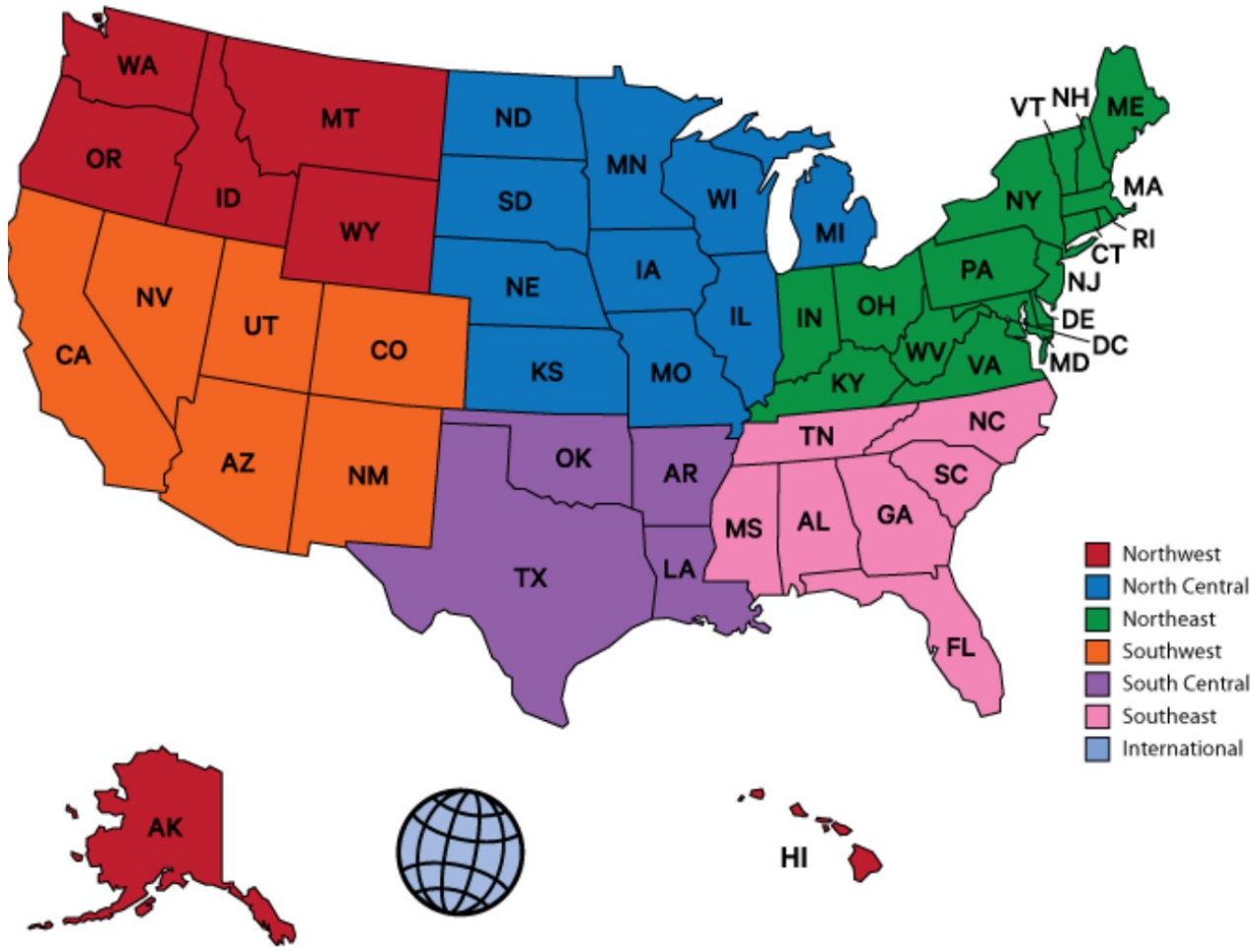
INSIGHTS  
 More than **60%** of respondents are age **45-64**

**Nearly 90%** of respondents are **Generation X & Boomers** (45yrs. +)



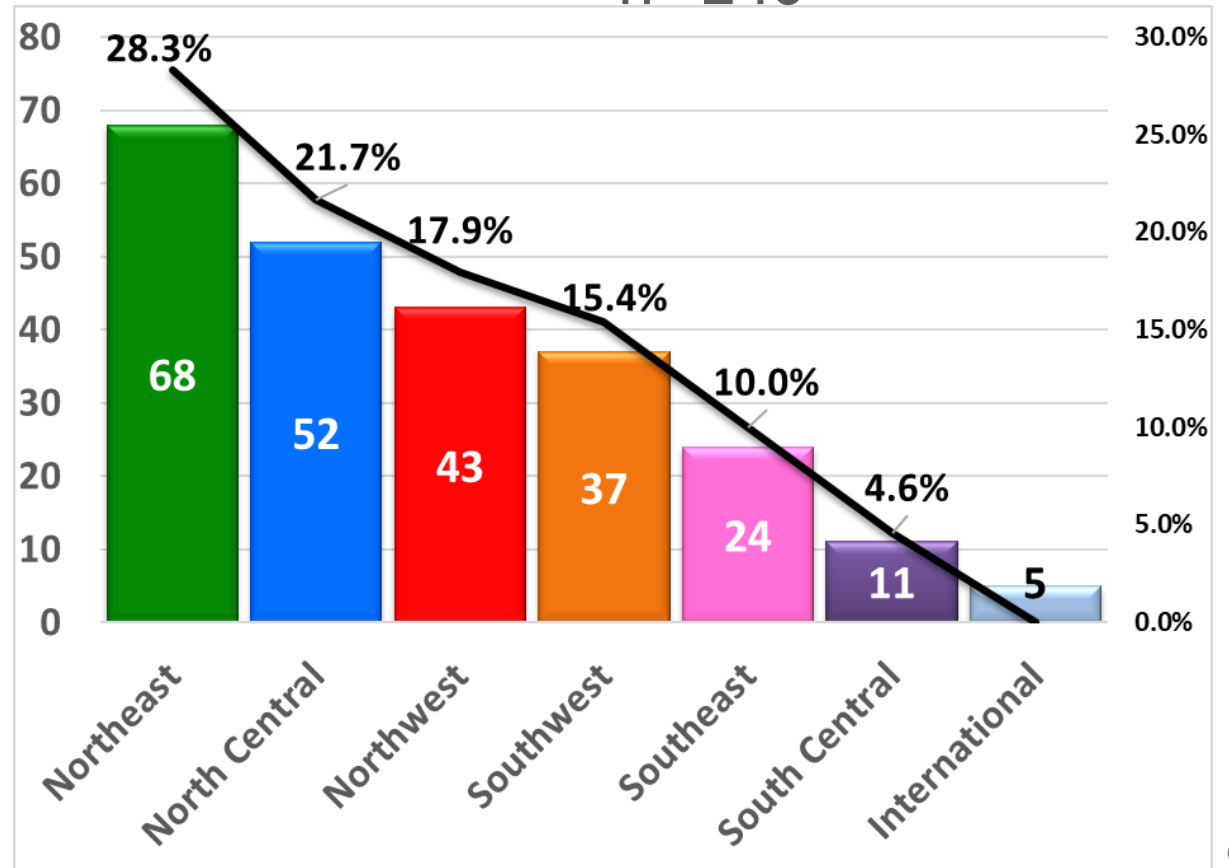
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# Demographics - Survey Participation by REGION

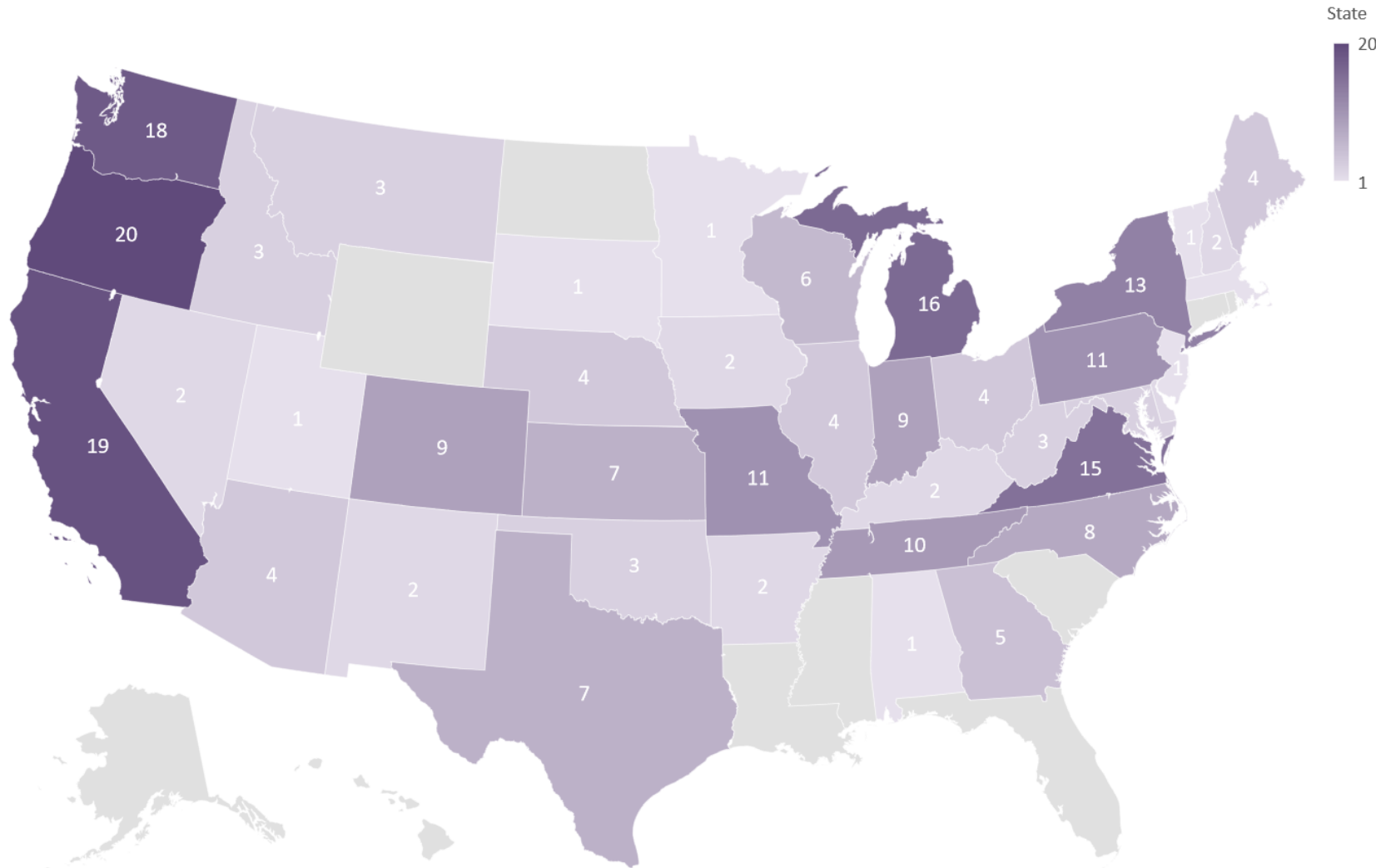


## Top Participating REGION

Northeast 28.3%  
n=240



# Demographics - Survey Participation by STATE



***No survey participants from:***

Alaska  
Connecticut  
Florida  
Hawaii  
Louisiana  
North Dakota  
South Carolina  
Washington DC  
Wyoming

n=240 of N=242

# Demographics - Deep Dive – by STATE Location

## Top 5 States reporting Lavender Farms (n=240)

	<u>count</u>	<u>% of total respondents</u>
Oregon	20	8.3%
California	19	7.9%
Washington	18	7.5%
Michigan	16	6.7%
Virginia	15	6.3%





# Demographics - 5 International Respondents

**Židovice, Czech Republic,  
Europe  
(1 respondent)**



**Dolores Hidalgo,  
Guanajuato State, Mexico  
(1 respondent)**



**Canada (3 respondents)**

- Grand Forks/BC
- Ontario



# Harvest Production Survey Questions



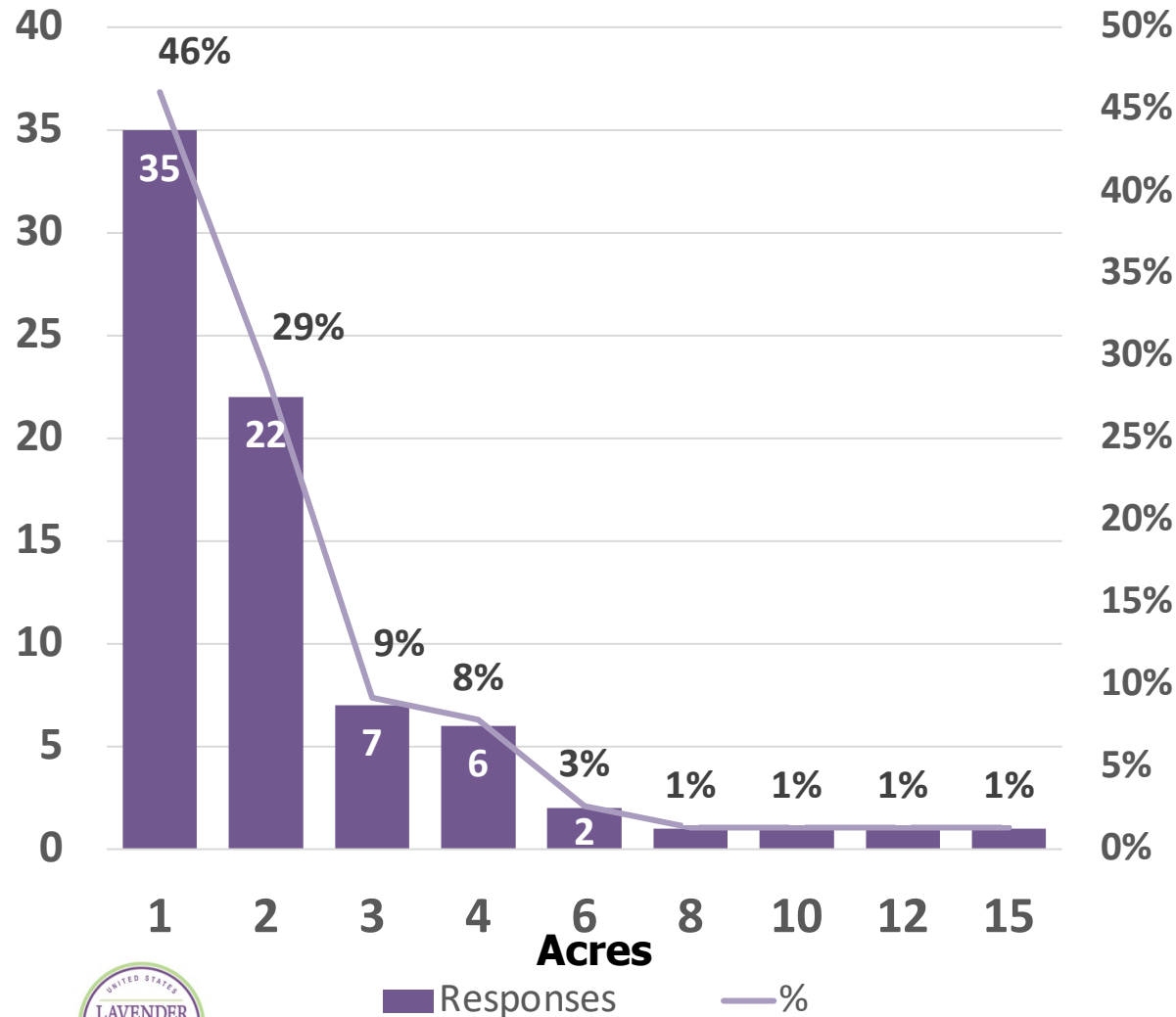
- Number of ACRES in lavender cultivation?
- Total LAVENDER PLANTS in production on the farm?
- Total fresh lavender production for DISTILLATION (pounds)?
- Total ESSENTIAL OIL production by volume (ounces)?
- Total hydrosol production by volume (gallons)?



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# Harvest Production - Acreage

n=136 56%  
Response Rate



## Key Insights

**Just over 200 acres reported planted**

**Respondent farm size nearly evenly split**

- **55% >1 acre (n=76)**
- **45% <1 acre (mode; n=61)**

**Only 9 unique farm size/acreages reported as >1 acre:**

- **1 acre MODE (n=35; 46%)**
- **AVERAGE acreage 2.4 acres**
- n = 1 for each acreage reported >6 acres

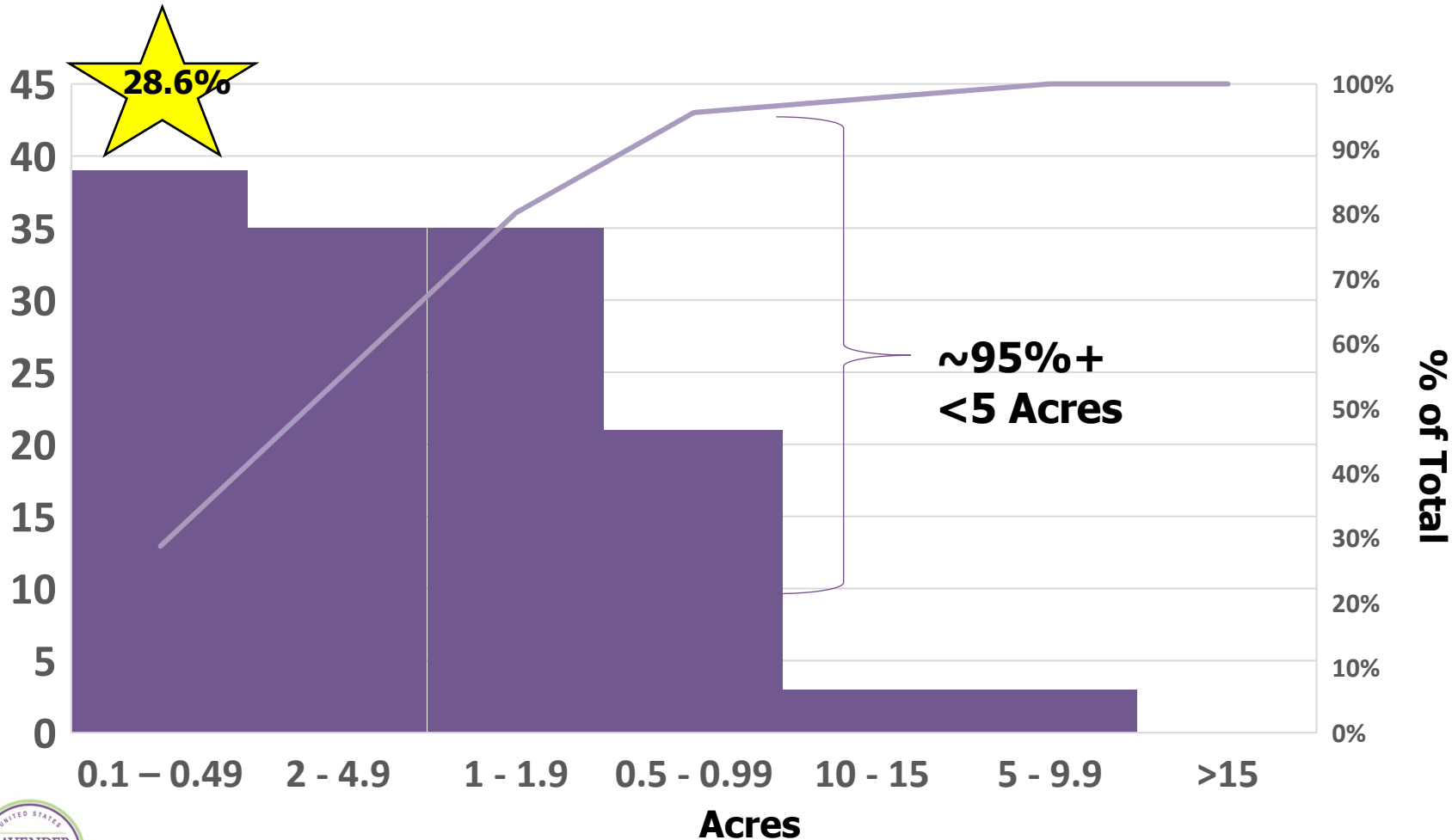
**ZERO respondents reported >15 acres**

**For farms reporting <1 acre (n=61):**

- **.25 acre MODE (n=19)**
- **AVERAGE 1/3 acre.**
- **25% of respondents reported 1/2 acre.**

# Harvest Production – Acreage – Deep Dive

Acres in Lavender Cultivation including < 1 acre n=136)



## Chart "bin" Details

Acres	Reported
>15	n=0
10 - 15	n=3
5 - 9.9	n=3
2 - 4.9	n=35
1 - 1.9	n=35
0.5 - 0.99	n=21
0.1 - 0.49	n=39

## Key Insight

- 95%+ of respondents reported farms <5 acres.





# Harvest Production – Lavender Plants

n=133 55%  
Response Rate



- **240,515 Plants** reported in production.
- **1,255 Average Plants per acre** reported for farms >1 acre.
- **1,000** Plants per acre *most frequently reported.*
- **1,197** Plants per acre calculated from reporting of Total # Plants & Total # acres (all farm sizes).



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# Harvest Production – Lavender Plants - Deep Dive by Region

## AVERAGE PLANTS per acre (Farms >1 acre)

	<u>2023</u>	<u>2022</u>
North Central	1,042	1,504
Northeast	1,300	1,316
<b>Northwest</b>	<b>1,442</b>	<b>2,062</b>
South Central	661	1,152
Southeast	476	938
Southwest	1,520	1,522

## AVERAGE PLANTS per acre (Farms <1 acre)

	<u>2023</u>	<u>2022</u>
North Central	1,131	783
Northeast	1,405	935
Northwest	1,856	2,111
South Central	613	635
Southeast	1,088	973
Southwest	1,830	991

## Key Insights:

The **Northwest region consistently reports higher density** planting, regardless of acreage in production.

Overall, < 1 acre enterprises seem to be increasing planting density, while some regional reporting for farms >1 acre show decline in plant density.



2023 International: >1 acre Avg. 3,250; <1acre 500 plants/acre

# Harvest Production – Total Fresh Lavender

n=38 16%  
Response Rate

	Angustifolia	Lavandin	Other	Grand TOTAL
<b>Total Pounds (lb) Reported</b>	<b>5,646</b>	<b>11,848</b>	<b>799</b>	<b>18,293</b>
<i>AVG Pounds (lb)</i>	<b>148.6</b>	<b>515.1</b>	<b>88.8</b>	<b>752.5</b>
<b>Total Bundles Reported</b>	<b>122,661</b>	<b>87,401</b>	<b>9,622</b>	<b>219,684</b>
<i>AVG Bundles</i>	<b>1,703</b>	<b>1,533</b>	<b>641</b>	<b>3,878</b>



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**Key Insight:** Lavandin is harvested in pounds at levels 2X that of Angustifolia, yet Angustifolia growers reported nearly 1.5X the bundle count of Lavandin producers. Growers report strong individual preferences for how production *should be* accounted for (pounds vs. bundles). These individual preferences may account for some reporting variability.





# Harvest Production - Angustifolia Fresh Bundle - CULINARY

n=64 26%  
Response Rate

# 50%



**Key Insight:** While 25% was the most common response received, **50% was the average** Angustifolia harvest allocated for culinary use overall. This suggests many respondents **allocate all (100%) of their fresh Angustifolia for culinary use.**



# Harvest Production - Total Fresh Lavender for Distillation

	Grosso	Angustifolia	Lavandin	Other	Grand TOTAL
<b>Total Pounds (lb) Reported</b>	<b>9,458</b>	<b>4,806</b>	<b>5,359</b>	<b>2,535</b>	<b>22,158</b>
<i>AVG Pounds (lb)</i>	<b>429.9</b>	<b>209.0</b>	<b>357.3</b>	<b>633.8</b>	<b>1,629.9</b>

n=23 10%  
Response Rate



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**Key Insight: Grosso leads reporting for distillation purposes - 43% of total production. However *only 10%* of survey respondents reported lavender harvested for distillation purposes.**



# Harvest Production - Essential Oil Production

n=22 9%  
Response Rate

	Grosso	Angustifolia	Lavandin	Other	Grand TOTAL
<b>Total Ounces (Oz) Reported</b>	<b>4,963</b>	<b>2,424</b>	<b>3,209</b>	<b>38</b>	<b>10,634</b>
<i>AVG Ounces (Oz)</i>	<b>236.3</b>	<b>110.2</b>	<b>200.6</b>	<b>9.5</b>	<b>556.6</b>



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**Key Insight: 9%** of survey respondents reported a **total of 83 gallons Essential Oil.**

**47%** of lavender reported for **Essential Oil is Grosso.**



# Harvest Production - Hydrosol Production

n=44 18%  
Response Rate

2,480  
Gallons (9,387 liters)



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USLGA Harvest hydrosol production could almost fill this 3,000gal.tanker.

**Key Insight:** 2023 reported **ratio of hydrosol** to essential oil production is **30 to 1**.



# Harvest Production - Other Production related Comments

n=25 10%  
Response Rate

## Some Harvest Survey Respondents reported...

- **Essential Oil** production for a variety of flowers/mixed.
- Production as **GALLONS of dry bud**.
- **Fields too young/too small** for harvest or reporting.
- **Incomplete production season** for Essential Oil reporting.
- **U-Pick bundles as a variant** to reported production.
- **Cuttings** as a form of "production"/harvest, but not requested.
- **Operational oversight to not separate production** by weights/bundles.



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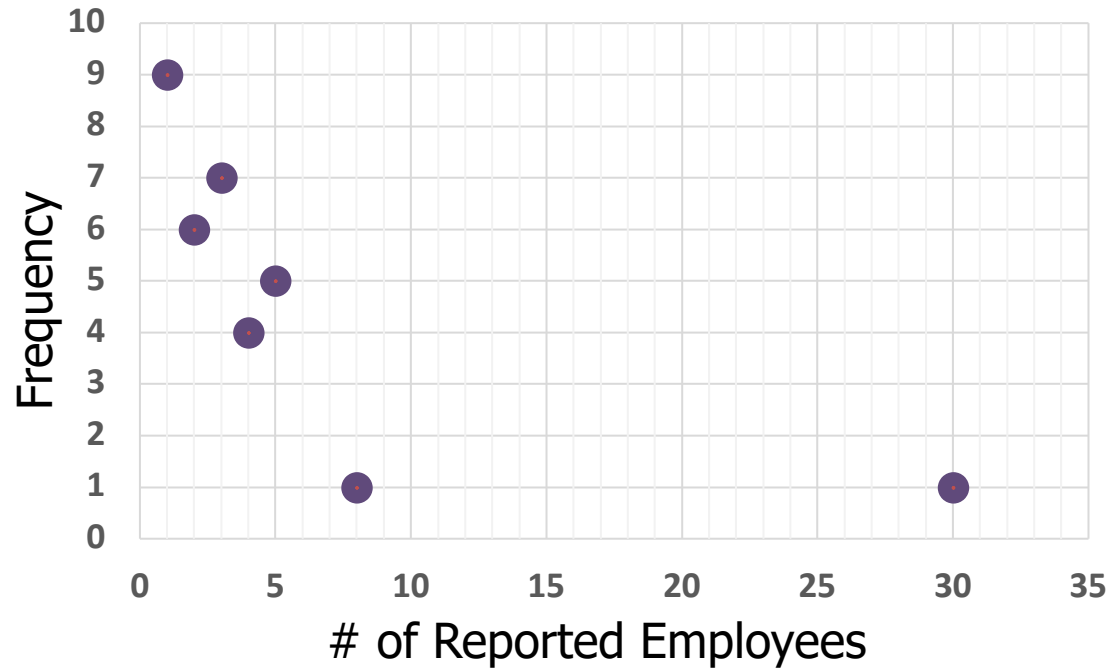
# Farm Operations Survey Questions



- Multiple choice business/farm operation and product offers.
- Does agritourism/event hosting require special county zoning/permissions in your area?
- Do you carry special insurance coverage to support your Agritourism Events?
- How is your farm/property currently zoned?
- Please indicate the number of family, friends/volunteers, or employees/associates that work your farm operation.
- How many visitors came to your farm/business for the 2023 year?
- Was actual visitor Ticketing/Tallying used to generate the value entered above?



# Farm Operations – Workforce Family, Friends, Volunteers



- **Maximum number of employed associates for any respondent was 30**
  - **Most commonly reported** number of associates was **1 (27%)**
- **21% of responders indicated FRIENDS & VOLUNTEERS** supported their workforce needs (n=50)
  - **72%** of those utilizing Friends & Volunteers used **1-2** to support their enterprise
  - **20%** utilized **between 5-20** Friends & Volunteers

n=33 14%  
Response Rate

# Farm Operations – Workforce Family

n=105 43%  
Response Rate



- **Nearly HALF of respondents support their workforce needs with FAMILY members (43%)**
- **Maximum number of family engaged in a respondent enterprise was 27 (n=1)**
  - **Most common reported** number of family members working is **2 (42%)**
- **90% of respondents utilize between 1-5 FAMILY members to support their enterprise**





# Farm Operations – Visitor Volume



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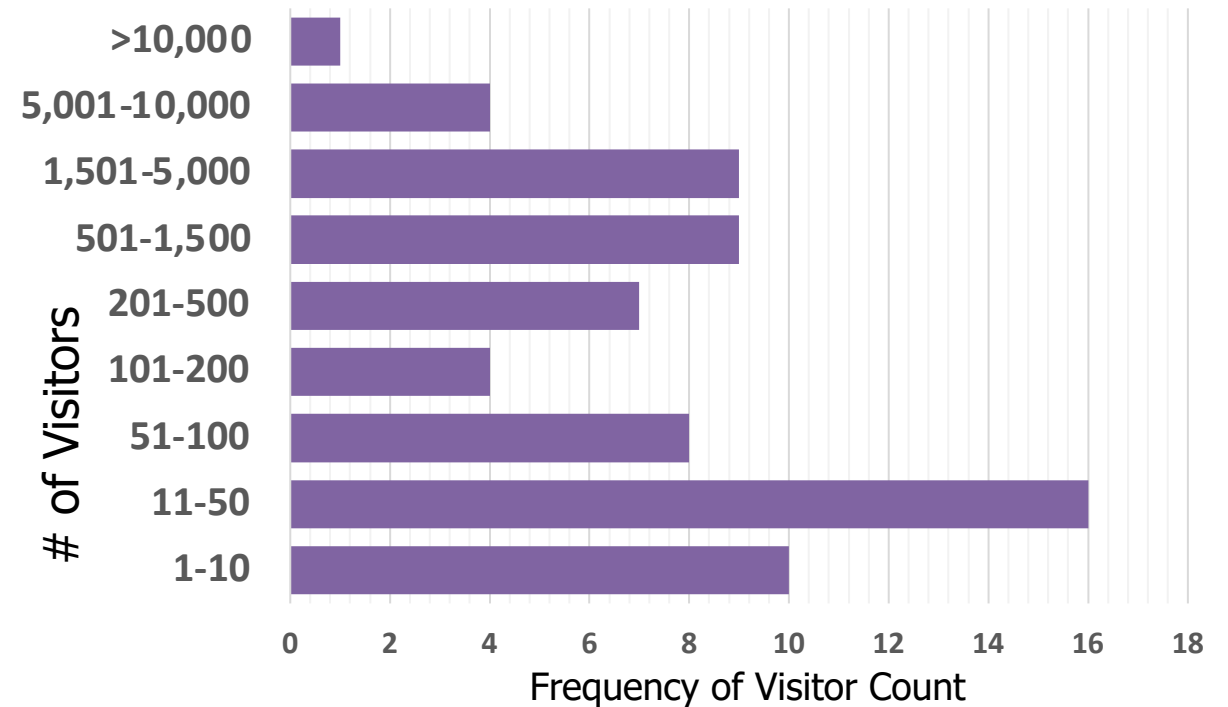
2023 Visitors to respondent farms would overflow historic Lambeau Field, home of the Green Bay Packers football team. Capacity 81,441.



**A total of 86,267 visitors were reported visiting the farms of 66 respondents**

n=66 27%  
Response Rate

- The **AVERAGE** visitor count was **1,327**



# Farm Operations – Visitor Volume - Deep Dive

- **The Northeast** reported the highest visitor count with **over 50,000 visitors engaging the 37 reporting business enterprises**
  - **Virginia, Pennsylvania and Indiana** contributed significantly to the visitor count in the Northeast, with **(20K, 11K, and 10K visitors respectively)**
- **Northcentral reported** the 2nd highest visitor count with over **16,000** visitors, **10K** attributed to **enterprises in Michigan**
- **The Northeast and Northcentral** also reported the **highest activity in Agritourism events/services** (32% and 19% respectively)
- In consideration of agritourism, only **a minority of farms currently utilize a formal tally “system”** to track visitor counts (22%),

Agritourism  
n=39 16%  
Response Rate



# Farm Operations – Agritourism – Zoning & Insurance

**51** respondents reported being engaged with Agritourism activities (21%)

n=127 53%  
Response Rate

- When asked if **hosting agritourism/events required special county zoning/permissions in ones area**, nearly ½ of respondents (n=58, 45.7%) didn't know, while 20% reported YES, special zoning/permissions were required.

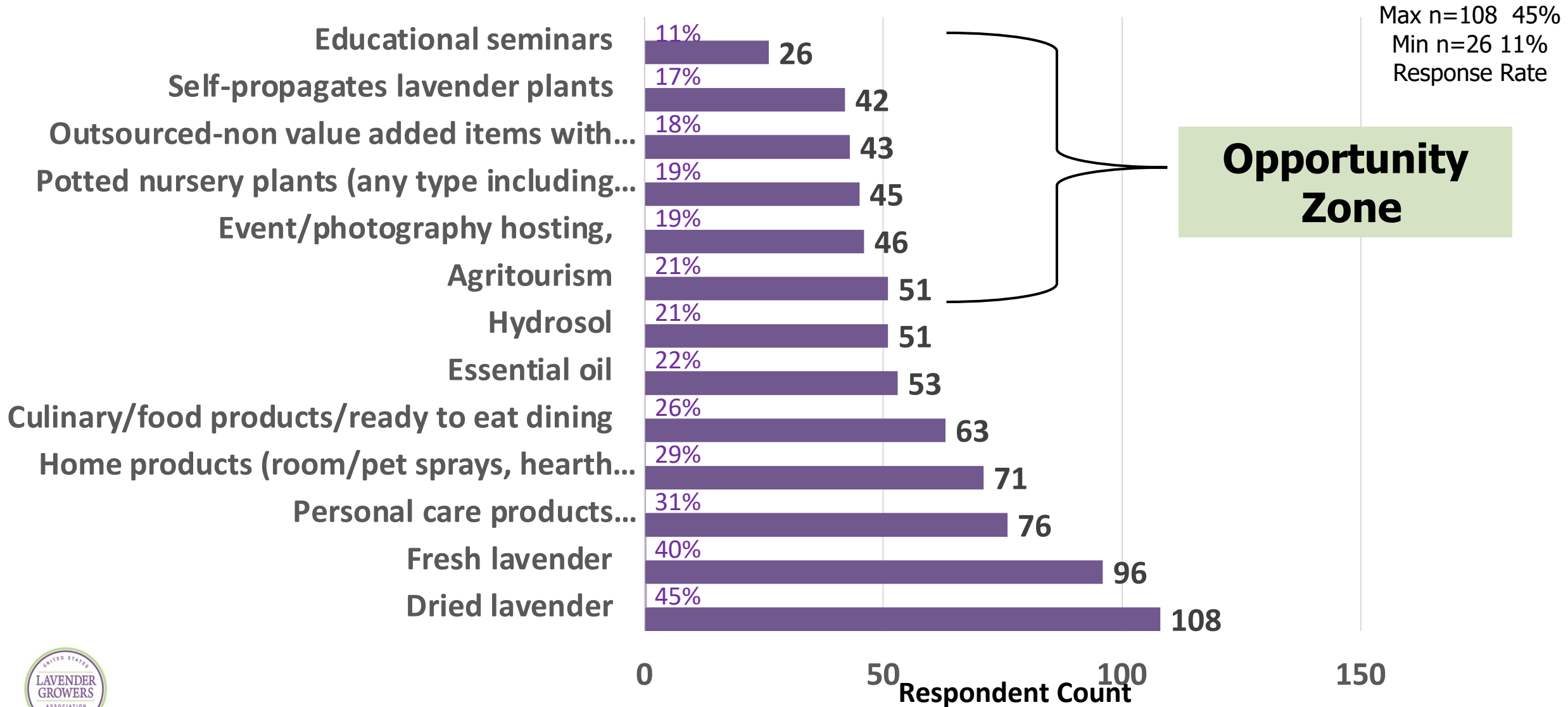
**Over 36% of responders (n=46) carry specialized insurance for their agritourism events.**

- **10% (n=13) are covered by their existing farm policy, while 8% either knowingly chose not to purchase insurance (n=5) or weren't aware they needed to, so they hadn't yet looked into it (n=5).**

**61.4%** of respondent locations involved in agritourism are **zoned agricultural. Nearly 23% are zoned mixed use or dual use (n=29), while 15% (n=19) are zoned residential, and only one respondent's location is zoned commercial.**



# Farm Operations – Product/Service Offering



# Farm Operations – Product/Service Offering – Deep Dive

## Regional Leader Board – Rank order by response frequency

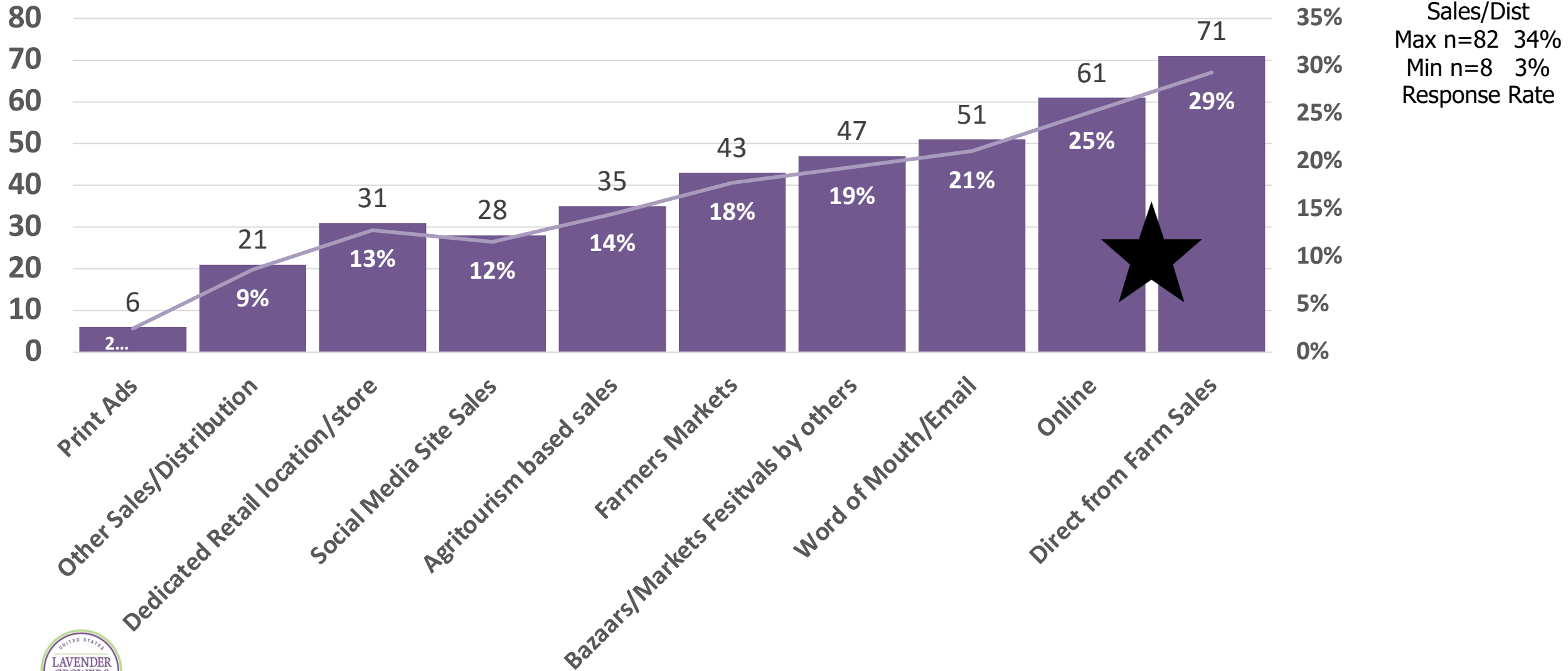
Product/Service  
Max n=108 45%  
Min n=26 11%  
Response Rate

	Self-propagated lavender plants	Potted nursery plants (any type including lavender or other)	Fresh lavender	Dried lavender	Essential oil	Hydrosol	Personal care products (soaps/lotions/body sprays, etc.)	Home products (room/pet sprays, hearth products, etc.)	Culinary/food products/ready to eat dining	Outsourced-non value added items with lavender theme (towels, pottery, jewelry, books, etc.)	Event/photo graphy hosting,	Educational seminars
<b>International</b>	1	1	2	2	1	2	1	2	2		2	
<b>North Central</b>	4	2	2	2	2	2	2	2	1	2	3	3
<b>Northeast</b>	1	1	1	1	3	3	1	1	2	1	1	1
<b>Northwest</b>	2	2	2	2	1	1	3	2	3	2	2	2
<b>South Central</b>	4	3	5	5	6	6	6	5	6	5	6	4
<b>Southeast</b>	3	3	3	3	5	5	5	4	5	3	4	4
<b>Southwest</b>	5	4	4	4	4	4	4	3	4	4	5	5

- Numbers in the International row represent **actual activity reporting** for the given Product/Service category.
- Values noted for each region represent the **rank order of highest activity** in the specific Product/Service category. (Highest activity count = 1, next highest 2...)



# Farm Operations – Sales and Marketing



# Farm Operations – Sales & Marketing – Deep Dive

## Regional Leader Board – Rank order by response frequency

Sales/Dist  
 Max n=82 34%  
 Min n=8 3%  
 Response Rate

	Direct from farm	Dedicated retail location farm store	Online sales (website, Etsy, etc.)	Sales @ Agritourism events	Festivals/ seasonal bazaars/ markets	Farmers markets	Social media site sales (Facebook Market Place)	Word of mouth/email sales	Print ads	Other
International	2		2	1	1	2	1	1		
North Central	3	2	3	3	4	3	2	3	2	1
Northeast	1	1	1	1	1	1	1	1	1	4
Northwest	2	3	2	2	2	2	2	2		2
South Central	6	6	6	5	5	6	3	5	2	4
Southeast	4	4	5	2	3	5	4	4		5
Southwest	5	5	4	4	3	4	3	6		3

- Numbers in the International row represent **actual activity reporting** for the given Sales/Marketing category.
- Values noted for each region represent the **rank order of highest activity** in the specific Sales/Marketing category. (Highest activity count = 1, next highest 2...)



# Revenues/Profitability Survey Questions



- What is your actual/estimated Gross Revenue in U.S. Dollars?
- Please share more detailed financial data regarding your annual revenues in U.S. dollars to assist us in better understanding your operation and its impact on the US lavender industry.
- Is your business or farm profitable?
- During which year(s) of operation did you “first” achieve profitability?
- Would you be willing to provide information on area farms that aren’t participating in the survey to try to collect regional data (number of farms, number of acres, how much lavender) as estimates?



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# Revenues Reporting

**\$3.43MM in TOTAL revenue** was reported by 65 survey participants for an **average reported revenue** of approximately **\$52,700**

Max n=65 27%  
Response Rate

## Respondents also reported...

- \$1.7MM total sales of **Value-Added products** (n=42) for an **average of ~\$42,190**.
- \$484K **Wholesale sales** (n= 25) for an **average of ~\$19,350**.
- \$405K **Direct to Customer** sales (n=47) for an **average of ~\$8,610**.
- *A single respondent reported **Export Sales (\$1,500)**.*



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# Profitability Reporting

n=128 53%  
Response Rate

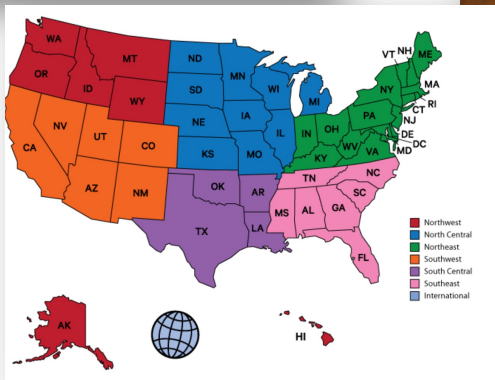


**63%** Of respondents reported their operation is **NOT YET profitable** (n=80)

However, **25% of those who report being profitable (n=32)** have done so in **3 yrs. or less.**



# Resources /Educational Interests Survey Questions

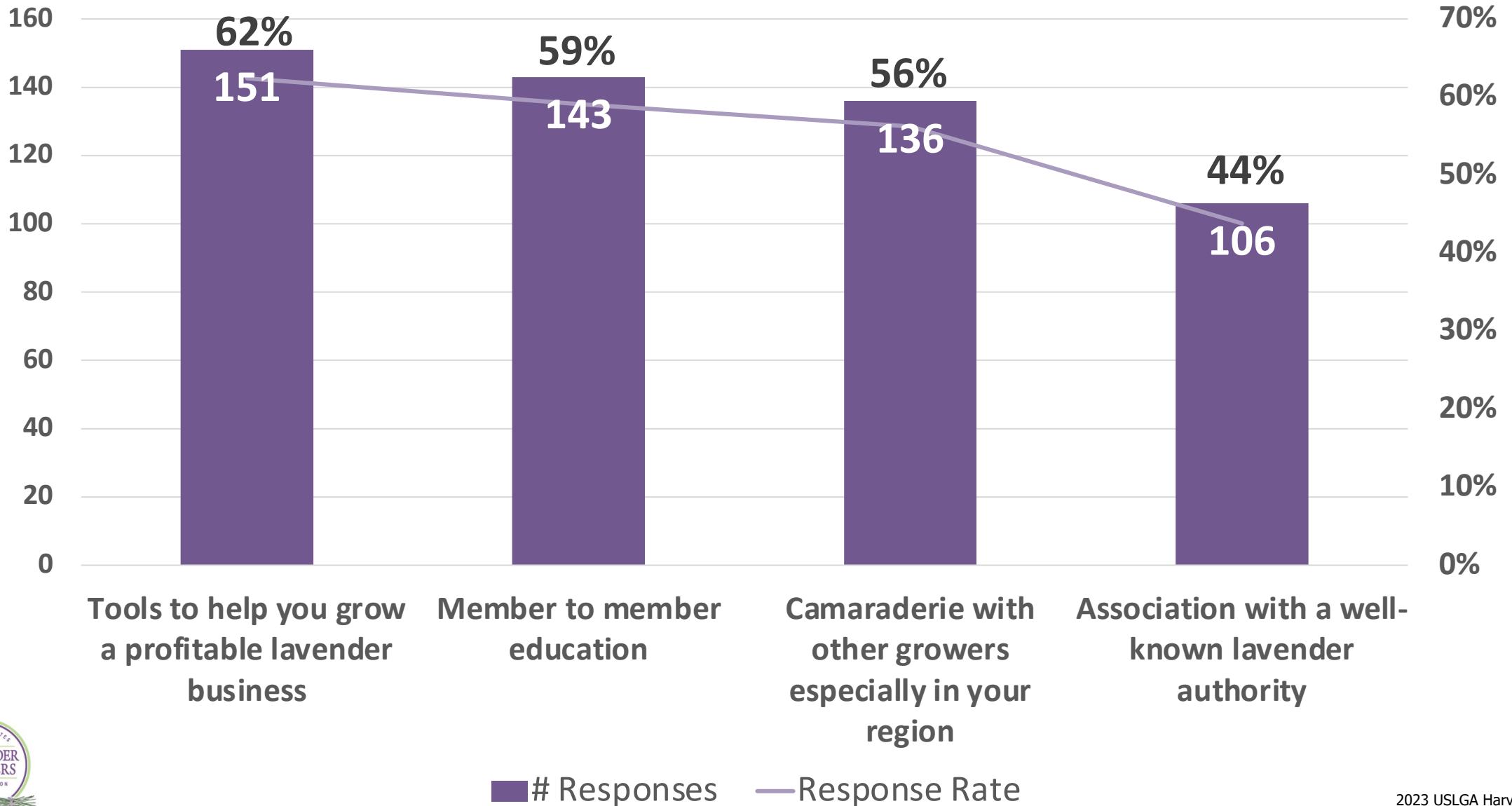


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- In what way can USLGA aid in your success/profitability?
  - ✓ Tools to help you grow a more profitable lavender business
  - ✓ Member to Member education
  - ✓ Camaraderie with other regional growers
  - ✓ Association with a well-known lavender authority



# How can USLGA aid in your success/profitability?



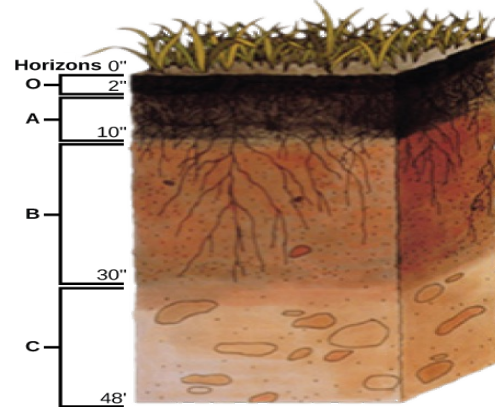


# Future Front Porch Event Educational Interests

N=205 85%  
Response Rate



FOOD SAFETY



**Industry Information**  
**39%**

**Farm Production**  
**35%**



# Highlights

- Respondents: Two hundred and forty-two (242) growers responded to the survey, representing 208 members, and 32 non-members. Based on 596 current USLGA members, the 240 survey respondents yielded a “good” response rate of 34.9%, with 86.6% of this percent representing current members. Generally, a “good” response rate falls 5% - 30%, and excellent is 50% plus.
- Years in Production: 52% Starts Ups (0-3 years), 42% Growth (4-15 years), 5% Established (16-30 years), 1% Heritage (40+). 90% of respondents are age 45 and older, and 60% of respondents in the 45-64 range.
- Demographics: The Northeast region had the most survey participants, however, the states that reported the most lavender farms according to the survey are Oregon, California, Washington, Michigan, and Virginia.
- Total Harvest: Survey respondents reported over twenty tons (20.2 tons) of fresh and for distillation lavender was being harvested.
- Plants in Production: Over two hundred and forty thousand (240,000+) plants in production.
- Cultivars: Lavandin is harvested in pounds at levels 2X that of Angustifolia, yet Angustifolia growers reported nearly 1.5X the bundle count of Lavandin producers.
- Employees: Farm operations are still, most commonly, supported by family, friends and volunteers. An interesting statistic in our survey showed 90% of respondents use family members to support their farms, with 42% reporting that they employ 2 family members.
- Distillation: Grosso leads reporting for distillation purposes with forty-three (43%) percent of total production. However only 10% of survey respondents reported lavender harvested for distillation purposes.
- Essential Oil: Nine (9%) percent of survey respondents reported eighty-three (83) gallons of lavender essential oil. Forty-seven (47%) percent of lavender reported for Essential Oil is Grosso.
- Hydrosol: Respondents reported two thousand four hundred and eighty gallons (2480 gallons or 9387 liters) were produced. Ratio of hydrosol to essential oil production is 30 (hydrosol) to 1 (essential oil).
- Culinary: Twenty-five (25%) percent was the most frequently reported percentage of fresh Angustifolia bundles harvested for culinary use. However overall, 50% was the average reported for culinary use, indicating many respondents allocate all on hundred (100%) percent of their fresh Angustifolia for culinary use.
- Agritourism: The Northeast region leads in agritourism, and in the number of visitors. Overall, survey respondents welcomed over eighty-six thousand (86,267) visitors to their farms in 2023. Average counts were 1327 visitors.
- Products: Respondents reported most popular products offerings were dried bud (45%), Fresh (40%), Personal care (31%), Home products (29%), Culinary (26%), Essential Oil (22%), Hydrosol (21%), with opportunities for growth in Agritourism (21%), Event hosting (19%), Potted Plants (19%), Lavender theme products (18%), and Educational Seminars and Workshops (11%).
- Marketing/Sales: Respondents reported most successful marketing/sales came from Direct from Farm Sales (29%), Online (25%), Word of Mouth/Email (21%), Festivals (19%), Farmers Markets (18%), Agritourism (14%), Social Media (12%), retail store (13%), Other (9%), and Print Ads (2%).
- Revenues: \$3.43million in total revenue was reported by 65 survey participants for an average reported revenue of approximately \$52,700 per respondent.





# 2023 USLGA Harvest Survey Q&A Session

Annual Meeting







The United States Lavender Growers Association is a 503c(6) non-profit organization that was founded in 2011 when a group of lavender growers and crafters came together with a particular mission: to support and promote the United States lavender industry through research, education, networking and marketing.

Membership now totals over 600 and continues to grow rapidly. For more information on lavender or membership go to [www.uslavender.org](http://www.uslavender.org) or email [info@uslavender.org](mailto:info@uslavender.org). For more information on this or any other USLGA sponsored survey email [education@uslavender.org](mailto:education@uslavender.org)



# 2023 USLGA Harvest Survey Presentation

Education & Research Committee