

# 2025 USLGA Business Operations & Harvest Survey

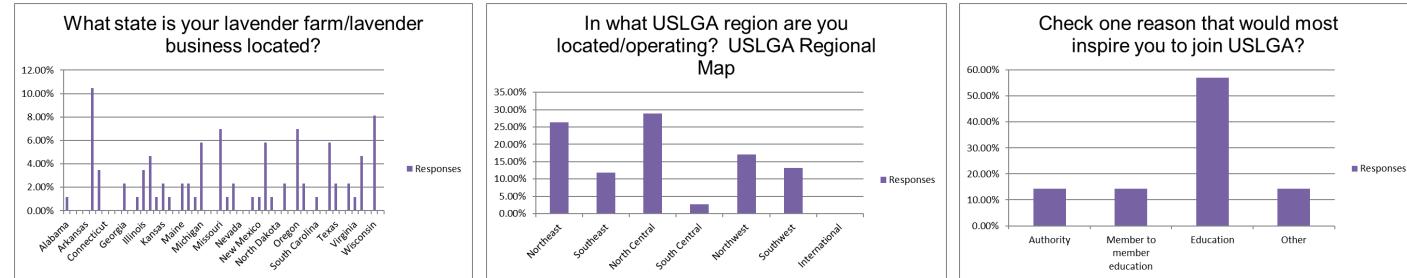
## Chart Highlights



### Survey Methodology & Response Overview

**The United States Lavender Growers Association (USLGA) launched its annual membership survey on September 15, 2025. Of a total membership of 442 individuals, 87 completed responses were received, resulting in an approximate 20% response rate. All responses were submitted from within the United States.**

**A 20% response rate is considered typical-to-strong for online membership surveys and provides a statistically meaningful snapshot of the Association's active grower base. The data reflects a geographically diverse and actively engaged lavender industry.**



### What state is your lavender farm/lavender business located?

Responses came from across the United States, with the highest participation in California and Wisconsin and strong regional representation from the Northcentral, Northeast, and Northwest, indicating that lavender production is most prevalent in temperate and continental climates while remaining geographically diverse; the median respondent age was 55, reflecting an experienced grower population.

#### Highlights:

- The 2025 USLGA annual membership survey received 87 responses from a total of 442 members, achieving a 20% response rate, which aligns with typical benchmarks for online surveys.
- Respondents represented farms across the U.S., with the highest participation from California (>10%), Wisconsin (>8%), Oregon (approx. 7%), and Montana (approx. 7%), and regional representation strongest in the Northcentral (29%), Northeast (27%), and Northwest (17%).
- The median grower age is 55, reflecting a mature and experienced population, while production is strongest in temperate and continental climates but remains geographically diverse.

### How many years has your lavender farm/business been in operation?

Most respondents are relatively new to lavender farming, with 65% operating fewer than four years and 32% in business just 1–2 years, while 34% represent a stable mid-range group (5–17 years), indicating an industry in a clear growth phase with strong new entry and emerging stability.

#### Highlights:

- Most U.S. lavender farms are new, with 65% in operation fewer than four years, indicating strong recent growth and an influx of new growers. The largest share of respondents (32%) have 1–2 years of experience, and 65% have fewer than 4 years in business, indicating strong early-stage growth in the U.S. lavender industry.
- Mid-range experience growers (5–17 years) make up 34% of respondents, representing a stable core that supports industry continuity and sustainability.
- Very long-term farms are rare, reflecting the recent expansion of lavender as a commercial crop in the United States.

### Reason to inspire you to join USLGA?

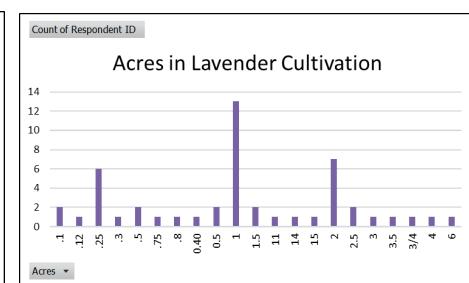
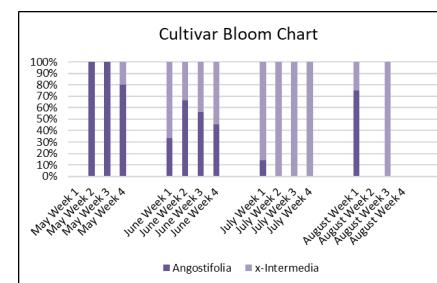
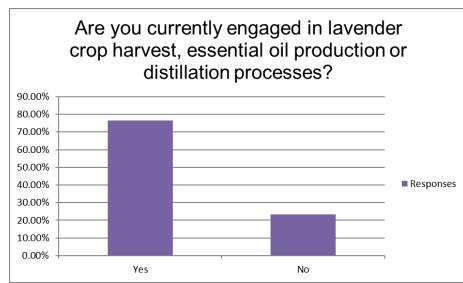
Respondents primarily joined USLGA for professional credibility, education, and community, valuing its role as a national authority that provides industry standards, practical resources, peer connection, and business visibility through promotional opportunities of the member directory.

#### Highlights:

- Respondents are motivated to join USLGA for professional credibility, access to high-quality educational resources, access to industry resources, tools, peer-to-peer knowledge sharing, and sharing standards.
- Many especially value community, peer-to-peer learning, and the opportunity to connect and collaborate with fellow lavender growers.
- Tangible benefits such as increased visibility and inclusion in the USLGA business directory also drive membership, supporting both business development and market access.
- Membership also provides networking, camaraderie, and promotional benefits, including visibility and inclusion in the USLGA business directory.

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## Chart Highlights



### Are you currently engaged in lavender crop harvest, essential oil production/ distillation?

A strong majority of respondents (77.62%) are actively engaged in harvest or distillation, while 23.38% represent emerging or transitioning operations, underscoring the need for USLGA programming that supports growers from early establishment through mature production.

#### Highlights:

- Respondents reported 18,072 pounds of lavender harvested for distillation with 6,353 ounces of essential oil produced, providing clear benchmarks for U.S. production levels.
- x-Intermedia cultivars - especially Gross - dominate distillation, accounting for over half of total essential oil output and roughly 62% of harvested material.
- Angustifolia contributes a much smaller share, reinforcing its role as a premium, lower-yield crop rather than a high-volume oil producer.
- The remaining 23.38% represents emerging, transitioning, or early-stage operations, revealing opportunities for mentorship, technical support, and targeted education across all stages.
- Understanding this mix enables USLGA to design programming that supports growers across all stages, from startup to fully established production.

### When distilling lavender, I typically use ...

Most distillers prefer fresh lavender (37.5%), with many using both fresh and dried material as conditions allow, while 30% do not distill at all, highlighting both the specialized nature of distillation and the operational flexibility required within a diverse lavender industry.

#### Highlights:

- Most respondents (37.5%) distill fresh lavender, prioritizing oil quality and aromatic compounds, while 27.5% use both fresh and dried material depending on conditions. A small percentage rely solely on dried lavender for distillation.
- Approximately 30% do not distill at all, and this highlights the specialized nature of essential oil production within the industry, with many farms focusing on non-oil products.
- The variability in distillation practices underscores the need for best-practice guidance on cultivars, harvesting, production, and storage to support growers' operational decisions.

### What Month/Week do your cultivars start blooming?

Most cultivars begin blooming in June - 65% of Angustifolia and 57% of x-Intermedia - with Angustifolia often starting earlier in May and x-Intermedia extending into July, allowing farms to better manage labor, harvesting, production/distillation, and extended agritourism season through staggered bloom times.

#### Highlights:

- According to respondents, June is the peak bloom-start period for both Angustifolia (65%) and x-Intermedia (57%), driving concentrated labor, harvest, distillation, and agritourism needs.
- Additionally, respondents reported that x-Intermedia extends into mid/late July (35%).
- This staggered timing allows farms to manage both cultivars harvest risk, extend their tourism season, and balance production and processing workloads.

### What is the number of acres (A) you have in lavender cultivation?

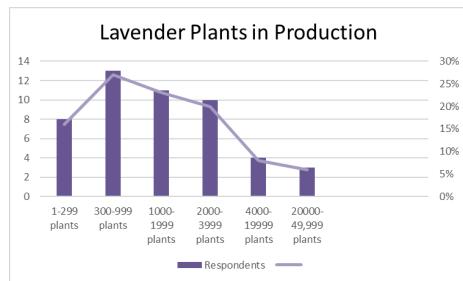
Most respondents farm under two acres, confirming lavender as a specialty crop within diversified operations, while a small number of larger plantings (10-15 acres) play a key role in supporting commercial supply, mechanization, and shared infrastructure across the industry.

#### Highlights:

- Most respondents cultivate under two acres of lavender, confirming its role as a specialty crop within diversified farms that prioritize hand labor, varietal care, and high-value direct sales.
- A small number of larger farms (10-15 acres) play a critical role in supporting mechanization, bulk oil production, and regional processing infrastructure.
- Together, this mix of small and larger operations highlights an industry that depends on balancing boutique innovation with scalable production to support sustainable growth.

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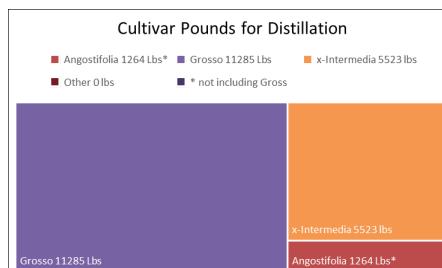


### Total number of lavender plants (P) in production on the farm?

Most respondents (66%) operate fewer than 2,000 plants, emphasizing small- to mid-scale, diversified operations, while 14% maintain larger plantings over 4,000, supporting commercial production and highlighting opportunities for collaboration, shared infrastructure, and industry support across scales.

#### Highlights:

- Two-thirds of respondents (66%) operate fewer than 2,000 plants, reflecting the prevalence of small to mid-scale farms focused on diversified income streams.
- Larger operations (14% with over 4,000 plants) drive commercial-scale production, highlighting opportunities for collaboration, shared infrastructure, and cooperative marketing.
- These scale characteristics suggest industry support efforts should prioritize the needs of operations with limited labor, capital, and mechanization.

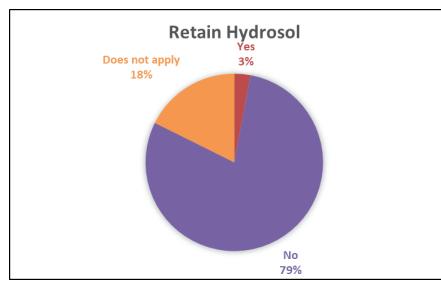


### Lavender harvest used for Distillation in pounds? Total lavender ESSENTIAL OIL production by volume in ounces?

U.S. lavender essential oil production is dominated by x-Intermedia, especially Grosso, which accounts for over half of oil output and harvest weight, while Angustifolia contributes minimally, highlighting its role as a premium, lower-yield crop and providing benchmarks for cultivar choice and distillation planning.

#### Highlights:

- Fifteen respondents reported 18,072 pounds of lavender harvested for distillation, and 18 respondents reported 6,353 ounces of essential oil produced.
- x-Intermedia—especially Grosso—dominates U.S. distillation, accounting for over 54% of oil output and about 62% of harvested material.
- Angustifolia contributes a small share, reinforcing its role as a premium, lower-yield crop rather than a high-volume oil producer.

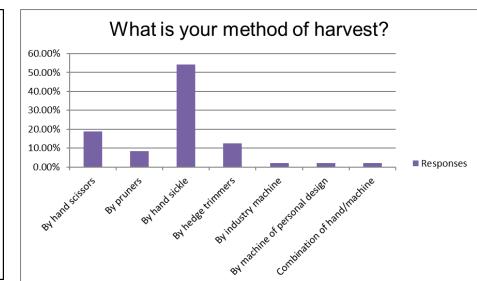


### Do you keep/retain hydrosol as part of your distillation? Please enter total hydrosol in gallons?

Most respondents (79%) do not retain hydrosol, though those who do produced 683 gallons, indicating it is largely underutilized as a co-product. "Other comments" reveal a need for consistent recordkeeping.

#### Highlights:

- Most respondents (79.41%) do not retain hydrosol, indicating it is widely treated as a byproduct rather than a co-product of distillation.
- Among those who do retain hydrosol, 683 gallons were reported, demonstrating its potential to add value beyond essential oil production.
- Only 2.94% actively retain hydrosol, while 17.65% reported the question as not applicable, reflecting limited distillation or capacity to manage secondary outputs.



### What is your method of harvest?

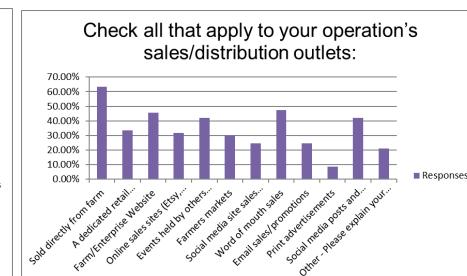
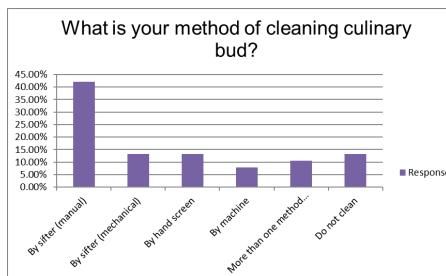
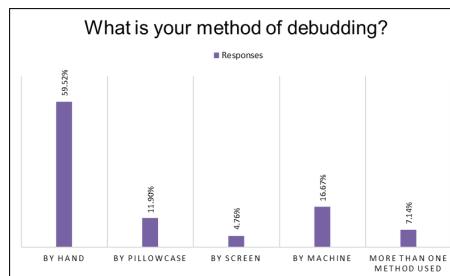
This question examines labor and efficiency in harvesting practices. Over 80% of growers rely primarily on hand labor, with hand sickles (55%) and scissors (18–20%) most common. Only 2–3% reported mechanized harvesting. Comments reveal experimentation with modified or imported equipment, underscoring both grower ingenuity and the lack of purpose-built lavender machinery in the U.S. market.

#### Highlights:

- U.S. lavender harvesting remains largely manual, with over 80% of growers relying on hand tools such as sickles (~55%), scissors (~18–20%), and hedge trimmers (~12–13%).
- Only 2–3% reported mechanized harvesting, typically using adapted or farm-built equipment, highlighting limited access to purpose-built lavender machinery and an unmet need for scalable solutions. Harvest tools are often selected based on end use, with different methods used for bundles, distillation, or other products to protect quality.
- Comments highlight grower ingenuity and experimentation with modified equipment, reflecting a gap in purpose-built lavender equipment and machinery as identified in the U.S.

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## Chart Highlights



### What is your method of debudding?

This question addresses post-harvest processing efficiency. About 60% debud by hand, while smaller shares use machines, cloth methods, screens, or mixed approaches. Most mechanized solutions are self-designed, indicating a significant mechanization gap. These findings highlight ongoing labor intensity and the need for affordable, scale-appropriate equipment.

#### Highlights:

- About 60% of growers debud by hand, with others using machines, cloth methods, screens, or mixed approaches.
- Most mechanized solutions are self-designed, highlighting labor intensity and a need for affordable, scale-appropriate equipment.

### What is your method of cleaning culinary bud?

This question focuses on food safety and quality. Manual and mechanical sifting dominate, while a notable minority reported not cleaning culinary bud at all. As with debudding, most mechanized solutions are homemade, revealing a gap between regulatory expectations and available tools.

#### Highlights:

- Manual sifting is most common for cleaning culinary buds, with mechanical methods used by some and 13–14% reporting no cleaning.
- Most mechanized cleaning systems are homemade, highlighting a gap between regulatory expectations and available equipment.

### Choose all business operation products & services offered?

These questions demonstrate extensive diversification within the industry. Most farms offer dried and fresh lavender, value-added products, and essential oil, while many also engage in agritourism, education, and events. Direct-to-consumer sales dominate, supported by online platforms, events, farmers markets, and social media. The layered nature of these channels reflects a highly localized and resilient sales strategy.

#### Highlights:

- U.S. lavender farms are highly diversified, offering dried and fresh lavender, value-added products, essential oil, and often agritourism, education, or event services.
- Sales are primarily direct-to-consumer, complemented by online platforms, events, farmers markets, and social media, reflecting a localized and resilient marketing strategy.

### What are your operation's sales & distribution outlets?

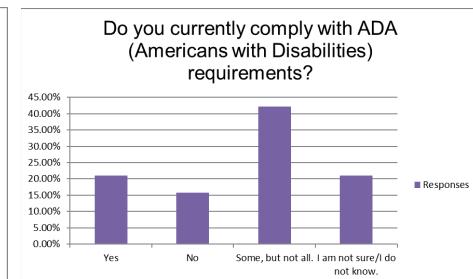
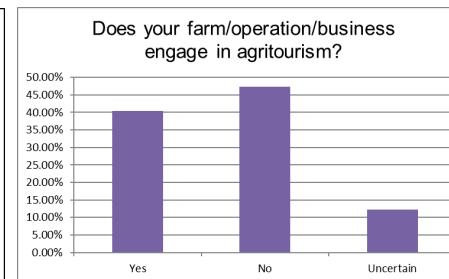
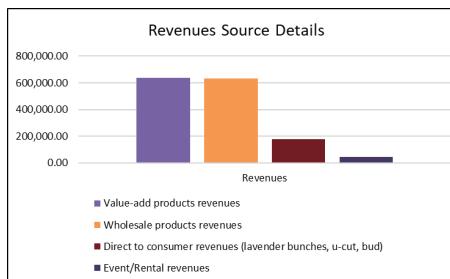
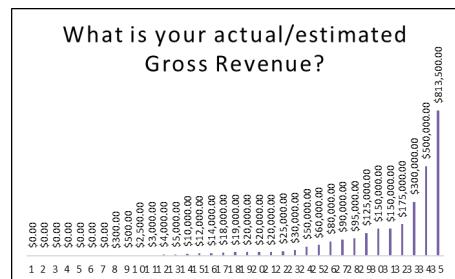
Most lavender farms sell directly to consumers (approx. 60–65%) and supplement sales through websites, online platforms, events, farmers markets, and social media, highlighting diversified, layered distribution strategies. Lavender growers combine agritourism, online presence, local engagement, and varied promotional channels to create layered, highly localized sales strategies rather than relying on a single distribution model.

#### Highlights:

- Lavender farms primarily rely on direct-to-consumer sales supported by a layered mix of digital, local, and event-based channels. This diversified approach reflects the need for flexibility and resilience in a small-scale, seasonal industry.
- Direct-from-farm sales anchor most operations, complemented by websites, online marketplaces, and farmers markets.
- Digital visibility and local promotion – through social media, email, events, and partnerships – play a key role in driving traffic and sales.

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## Chart Highlights



**What is your actual/estimated Gross Revenue?**

Reported gross revenues range widely, with most U.S. lavender operations earning \$10,000-\$100,000, while a smaller share reports either start-up, hobby-level, or high-revenue commercial enterprises exceeding \$100,000.

## Highlights:

- Reported gross revenues range widely from \$0 to \$813,500, reflecting a broad spectrum from first-year or hobby farms to established commercial operations.
- Most respondents fall within the \$10,000–\$100,000 range (approx. 37%), indicating a strong core of small but commercially viable lavender businesses.
- Most U.S. lavender operations report gross revenues between \$10,000 and \$100,000, reflecting a core of small but commercially active farms.
- A smaller portion of farms report start-up hobby-level, or high-revenue operations (23%), and reported revenues above \$100,000, demonstrating that diversified lavender operations can achieve substantial, six-figure incomes.

**During which year of operation did you first achieve profitability?**

These questions reveal the economic spectrum of lavender farming. Revenues ranged from \$0 to over \$800,000, with many farms still unprofitable. More than half reported they are not yet profitable, highlighting the long establishment period typical of perennial crops. However, a subset of diversified operations demonstrates that six-figure revenues are achievable.

## Highlights:

- Lavender farm revenues vary widely from \$0 to over \$800,000, with many operations still unprofitable.
- Over half of respondents have not yet reached profitability, reflecting the long establishment period, though some diversified farms achieve six-figure revenues within the first 15 years.

**Does your farm/operation/business engage in Agritourism?**

About 40% of U.S. lavender farms engage in agritourism, while nearly half do not and some are uncertain, showing it is a significant but not yet universal business growth strategy.

## Highlights:

- About 40% of respondents actively engage in agritourism, while 47% do not and 12% are uncertain, showing that visitor-focused activities are important but not yet universal in the U.S. lavender industry.
- Agritourism activities reported include farm tours, workshops, and U-pick experiences, often integrated with education and direct-to-consumer sales rather than as standalone enterprises.
- The uneven adoption highlights opportunities for industry education, policy support, and best-practice sharing to help growers evaluate agritourism's feasibility for their scale, location, and profitability goals.

## ADA Compliance

ADA compliance among U.S. lavender farms is uneven, with only 21% fully compliant, 42% partially compliant, 16% non-compliant, and 21% are unsure, reflect challenges especially for smaller operations.

## Highlights

- Barriers such as terrain, historic buildings, and upgrade costs highlight the need for practical solutions as agritourism expands.
- Only 21% of lavender farm respondents reported full ADA compliance, while 42% comply with some but not all requirements, 16% do not comply, and 21% are unsure possibly indicating differing state requirements.
- The prevalence of partial compliance highlights the need for clearer guidance, best-practice sharing, and practical solutions to support onsite accessibility as agritourism continues to grow.
- Common barriers include uneven terrain, historic buildings, and high infrastructure costs, while some farms are gradually improving accessibility with features like restrooms and parking.

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## Chart Highlights



Thank you for exploring the results of our annual survey.

The 2025 USLGA Business Operations & Harvest Survey was created over a decade ago to collect data from our growers and enables us to share their collective experiences in our ongoing effort to build a resilient and strong U.S. Lavender industry.

While every growing region presents its own unique challenges and opportunities, our goal is to provide clear, data rich, and practical information to support farmers at every stage, from getting started to expanding a commercial operation. USLGA is deeply committed to empowering growers with the knowledge, tools, and connections needed to cultivate exceptional lavender and sustainable farm businesses.

The United States Lavender Growers Association is a nonprofit organization that supports and advances the U.S. lavender industry through research, education, marketing, advocacy, and meaningful connections across our growing community.

Join USLGA and enjoy the benefits of membership:

**[www.uslavender.org](http://www.uslavender.org)**

