



USLGA

Webinar: 2025 USLGA Business Operations & Harvest Survey
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Date(s): Saturday, January 31, 2026 at 9am PT / 12pm ET via Zoom
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United States Lavender Growers Association

2025 Business Operations & Harvest Survey

Executive Overview:

The 2025 United States Lavender Growers Association (USLGA) Business Operations & Harvest Survey is a cornerstone research effort designed to capture the real-world experiences of lavender growers across the United States. First issued by USLGA in 2013, this survey provides a consistent, longitudinal view of how production practices, business operations, and market conditions have evolved within the U.S. lavender industry.

The following pages contain USLGA's executive brief highlighting key, data-driven findings drawn from growers representing diverse regions, climates, scales, and business models. While individual operations vary widely, the insights presented here reveal shared patterns, challenges, and opportunities that can inform decision-making across the industry. Findings are intended to be practical and actionable, supporting growers from early establishment through mature and expanding commercial operations.

Through our ongoing research, USLGA advances its mission to strengthen the U.S. lavender industry by providing trusted data, meaningful education, and a platform for shared learning. The Association extends its sincere appreciation to all survey participants and encourages continued engagement in future surveys as we work collectively to build a resilient, informed, and sustainable lavender sector in the United States.

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.

Demographics & Member Interest

Purpose of This Section

Based on survey respondents, the demographics section helps us understand who U.S. lavender growers are - where they operate, their experience level, scale, and production, and access their primary interests.

Geographic Distribution of Lavender Operations

Survey responses represent lavender farms and businesses across multiple U.S. regions, with the highest concentration of respondents located in:

- **California** (over 10%)
- **Wisconsin** (over 8%)
- **Oregon** and **Montana** (approximately 7% each)

At the regional level, participation was strongest in:

- **Northcentral region:** 29%
- **Northeast region:** 27%
- **Northwest region:** 17%

The **Southeast** and **Southwest regions** each accounted for approximately 14% of total responses.

Insight

This distribution reflects lavender's adaptability across diverse climates while highlighting regional clusters where lavender production, education, and collaboration may already be strongest. It also signals opportunity for targeted outreach, research, and regional programming in underrepresented areas.

Grower Experience & Industry Maturity

The survey reveals a **young and expanding industry**:

- **32%** of respondents have **1–2 years** of experience
- **65%** have **fewer than 4 years** in operation (<1 year, 1–2 years, 3–4 years)
- **34%** fall within a **mid-range experience** category (5–17 years)

Very long-term lavender operations remain relatively uncommon, reflecting the relatively recent emergence of lavender as a commercial specialty crop in the United States.

Insight

The strong presence of newer growers underscores the importance of foundational education, mentorship, and technical support. At the same time, the stable mid-experience cohort represents an opportunity to develop advanced training, peer leadership, and knowledge transfer within the Association.

Membership Interest

Motivation for Joining USLGA

Respondents consistently identified **professional credibility, education, and community** as primary motivations for joining USLGA.

Key themes included:

- Alignment with a recognized national authority in lavender
- Access to high-quality educational resources and best practices
- Peer-to-peer learning and shared experience
- Business visibility through the USLGA directory
- Connection to an engaged and supportive grower community

Insight

These responses position USLGA not simply as an information source, but as a **trusted professional home** for lavender growers who seek legitimacy, collaboration, and advocacy.

Farm Production

Lavender Production, Processing & Diversification in the U.S.

Purpose of This Section

Lavender production in the United States encompasses far more than crop establishment alone. Harvest methods, cultivar choice, distillation practices, post-harvest processing, and business diversification all directly shape labor needs, product quality, economic viability, and long-term sustainability. This section translates production-related survey data into practical benchmarks that reflect how lavender is currently grown, harvested, processed, and monetized across the U.S.

Farm Production

Lavender farm production encompasses a range of activities from crop harvest to essential oil distillation, which are critical for industry's growth and sustainability.

Among respondents:

- 77.62% are actively engaged in lavender crop harvest, essential oil production, or distillation
- 23.38% are not currently engaged, representing early-stage, transitioning, or diversified operations

Regarding distillation methods:

- 37.5% typically distill fresh lavender
- 27.5% use both fresh and dried material depending on conditions
- A smaller percentage rely solely on dried lavender
- 30% do not engage in distillation at all

Bloom timing data shows:

- Nearly two-thirds of Angustifolia cultivars (65%) start blooming in June
- Over half of x-Intermedia cultivars (57%) begin blooming in June
- Angustifolia blooms earlier (May for 24%), while x-Intermedia extends into July (35%)

Cultivation size details:

- Most farms operate under 2 acres, confirming lavender's status as a specialty crop
- A few larger farms (10–15 acres) anchor commercial supply and infrastructure
- Over two-thirds (66%) manage fewer than 2,000 plants, favoring diversified income models
- Larger farms (14%) with over 4,000 plants drive wholesale and bulk production

Distillation Harvest Volume & Essential Oil Output

- 18 respondents reported 6,353 ounces of essential oil production
- 15 respondents reported 18,072 pounds of lavender harvested for distillation
- Grosso cultivar dominates with 54% of oil and 62% of harvested weight
- Other x-Intermedia cultivars and Angustifolia account for smaller shares

Hydrosol retention:

- Majority (79.41%) do not retain hydrosol, treating it as a byproduct
- Only 2.94% retain hydrosol, producing a total of 683 gallons among those who do

Insight

The data illustrates a diverse production landscape, with most growers actively harvesting and distilling but a significant minority still developing operations. Distillation practices vary, reflecting operational realities such as weather and equipment availability. The concentration of bloom timing in June drives critical scheduling for labor and processing capacity.

The predominance of small acreage and plant counts underscores lavender's niche as a specialty crop supporting high-value, diversified business models rather than large-scale commodity production. However, larger farms play a crucial role in supply consistency and infrastructure. Hydrosol is underutilized as a co-product, indicating opportunities for education and market development.

Strategic Implications for the Lavender Industry

These findings suggest that USLGA should:

- Continue providing tailored education and technical support for both new and established growers, emphasizing best practices in harvest and distillation
- Develop resources to assist growers in managing bloom season labor and process bottlenecks
- Support infrastructure and cooperative models that connect small farms with bulk production capabilities
- Promote awareness and adoption of hydrosol utilization as a value-added product

Together, these strategies will help strengthen the entire production chain, from boutique farms to commercial-scale lavender operations.

Among survey respondents:

- **15 growers** reported a combined **18,072 pounds of lavender harvested for distillation**
- **18 growers** reported **6,353 ounces of lavender essential oil produced**

Cultivars - Production is overwhelmingly driven by **x-Intermedia cultivars**, particularly **Grosso**:

- **Grosso**
 - 11,285 pounds harvested (≈62% of total)
 - 3,440 ounces of oil (≈54% of total)
 - Reported by approximately 60–67% of distilling respondents
- **Other x-Intermedia cultivars**
 - 5,523 pounds harvested
 - 2,269 ounces of oil

- **Angustifolia**
 - 1,264 pounds harvested
 - 624 ounces of oil (≈7% of total)
 - **Other cultivars** - Negligible contribution

Insight

These results clearly confirm that **U.S. lavender distillation is a volume-driven activity dominated by x-Intermedia**, with Grosso as the cornerstone cultivar for essential oil production. Angustifolia consistently small share reinforces its role as a **premium, lower-yield crop** valued more for fragrance quality, culinary use, and branding than oil volume. This combined view of harvest inputs and oil outputs provides critical benchmarks for growers evaluating cultivar selection, distillation investment, and realistic production expectations.

Harvest Equipment & Method

Purpose of This Section

The purpose of this section is to ascertain what harvesting techniques are used in respondents' farms with analysis reflecting how these techniques impact labor requirements, operational efficiency, and product.

Among respondents:

- Approximately 55% use hand sickles
- 18–20% rely on hand scissors
- 12–13% use hedge trimmers
- 8–9% employ pruners
- 2–3% use machines
- The remainder use mixed or other methods

Insight

The survey confirms that U.S. lavender harvesting remains predominantly manual, with over 80% of growers relying primarily on hand labor. Tool choices often depend on product use - for example, scissors are favored for bundle production, while clippers are preferred for distillation harvests. A small but innovative subset of mechanized growers reported using commercial or adapted equipment such as Starr harvesters, tea harvesters, modified grass shears, and farm-developed machines inspired by concepts from New Zealand. This reflects a limited availability of purpose-built lavender machinery in the U.S., highlighting an unmet demand for scalable, quality-preserving harvest solutions.

Debudding Methods

Among respondents:

- About 60% debud by hand
- 17% use machines
- 12% employ pillowcase or cloth methods
- 5% use screens
- 7% use multiple methods

Insight

Post-harvest debudding remains labor-intensive and small-scale, with gradual adoption of mechanized or hybrid methods aimed at improving efficiency. Many mechanized debudding users rely on self-designed or homemade equipment such as wood-frame brushes and custom rotating brush systems, with few citing commercial products like the Besel Lavender Processor. This reveals a mechanization gap and an opportunity for development of affordable, scale-appropriate machinery that can enhance labor efficiency, product consistency, and grower safety.

Culinary Bud Cleaning Methods

Among respondents:

- 42–43% use manual sifting
- 13–14% use mechanical sifting
- 13–14% use hand screens
- Around 8% use machine cleaning
- 10–11% use multiple methods
- 13–14% reported no cleaning of culinary buds

Insight

Culinary bud cleaning is essential for food safety and regulatory compliance but largely remains a manual, small-scale process. Most mechanized cleaning methods rely on self-designed or repurposed equipment like motorized shaker boxes, modified seed cleaners, and flour sifters. Only a minority use commercial products. This highlights a clear need for affordable, standardized culinary bud cleaning machinery to meet regulatory requirements, improve labor efficiency, and ensure product safety. Opportunities exist for manufacturers and researchers to develop scalable solutions incorporating design features such as staged sifting and vacuum separation.

Business Operations & Use

Marketing Channels, Sales Strategies & Revenue Realities in the U.S. Lavender Industry

Purpose of This Section

Marketing and sales strategies determine whether lavender farms can convert agricultural production into sustainable income. Because most U.S. lavender operations are small, seasonal, and diversified, understanding how growers reach customers - and which channels generate revenue - is critical for improving resilience, profitability, and long-term viability across the industry.

Business Operations & Use

Lavender farms offer a diverse range of products and services, reflecting the industry's broad and evolving business models.

Among respondents:

- 75–80% offer dried lavender
- Approximately 70% offer fresh lavender
- 65–70% produce personal care and home products
- About 55% produces essential oil
- Around 50% offer culinary/food products
- 40–45% provide U-pick or agritourism-style experiences
- Roughly 30% host special events
- 25–30% engage in education, workshops, or photography services
- Less than 20% offer potted nursery plants
- Under 15–20% provide cut flowers or wedding-related uses

Insight

This broad mix highlights lavender farms as multifaceted businesses blending agriculture, manufacturing, education, and tourism. Core agricultural products dominate, but value-added and experiential offerings are widespread and growing, enabling farms to diversify revenue streams and enhance profitability.

Write-in comments underscore this diversification, with growers mentioning workshops, consulting services, agritourism-focused boutique product lines, and even non-commercial uses like honeybee forage. This variety reflects the adaptability and innovation driving the industry's resilience.

Strategic Implications for the Lavender Industry

- Diversification across products and services is critical for business sustainability
- Value-added and experiential offerings create higher-margin revenue opportunities
- Support for workshops, agritourism, and consulting can foster new growth pathways
- Recognizing non-traditional motivations (e.g., ecological benefits) broadens industry appeal

For USLGA, these findings emphasize the need to support a range of business models through education, resources, and networking that enhance both farm viability, and growth for the U.S. lavender industry.

Sales & Distribution Outlets

Survey results show that **direct-to-consumer (DTC) channels dominate lavender sales**, with most farms relying on layered, localized strategies rather than a single outlet.

Primary Sales Channels

- **Direct farm sales:** ~60–65%
- **Farm or enterprise websites:** ~45–50%
- **Online sales platforms (e.g., Etsy):** ~40–45%
- **Events hosted by others:** ~40%
- **Farmers markets:** ~30%
- **Social media sales / word-of-mouth:** ~25–30%

Marketing & Promotional Channels

- **Social media content:** ~40%
- **Email promotions:** ~25%
- **Print advertising:** ~20–25%

Write-in responses further highlight hyper-local marketing approaches, including search visibility through websites and Google listings, partnerships with local organizations, and even **billboards along major highways**, which one respondent noted as a significant driver of foot traffic.

Insight

Successful lavender farms rarely depend on a single sales outlet. Instead, they combine **on-farm experiences, digital visibility, local engagement, and event-based exposure** to reach customers. This layered approach spreads risk, captures seasonal demand, and maximizes the value of limited production capacity.

Gross Revenue Distribution

Among **35 respondents** reporting actual or estimated gross revenue:

- **20%** reported **\$0** in revenue
- **20%** reported **under \$10,000**
- **~37%** reported **\$10,000–\$100,000**
- **23%** reported **over \$100,000**
 - Including **three operations over \$300,000**
 - And **one exceeding \$800,000**

Insight

The U.S. lavender industry spans a broad economic continuum—from new or replanting farms with no sales, to highly diversified commercial operations generating substantial income. The largest segment consists of **small but commercially viable farms**, suggesting lavender can support meaningful income when paired with appropriate business models.

Agritourism

Agritourism as a Growth Strategy in the U.S. Lavender Industry

Purpose of This Section

Agritourism has emerged as a critical growth and diversification strategy for U.S. lavender farms, particularly those operating at small to mid-scale. By combining on-farm experiences with direct-to-consumer sales, education, and branding, agritourism allows growers to extend the value of limited acreage and seasonal production while strengthening customer relationships and long-term visibility.

Participation in Agritourism

Survey results show that agritourism is **significant but not yet universal** across the U.S. lavender industry:

- **40.35%** of respondents actively engage in agritourism
- **47.37%** do not engage in agritourism
- **12.28%** are unsure

Insight

The relatively even split between participation and non-participation highlights agritourism's importance as an opportunity rather than a default practice. The group indicating uncertainty suggests that some farms may be hosting visitors, workshops, or events without formally recognizing these activities as agritourism within their business model.

Forms of Agritourism in Lavender Operations

Write-in comments and related survey responses indicate that agritourism commonly includes:

- U-pick experiences
- Farm tours
- Workshops and educational programming
- On-site retail and seasonal events

Rather than functioning as a standalone enterprise, agritourism is most often **integrated with direct sales, education, and brand-building**, reinforcing its role as both a revenue generator and a marketing engine.

Insight

Agritourism serves as a multiplier: it increases on-farm sales, supports premium pricing, and amplifies digital and word-of-mouth marketing, however, also introduces operations that need intentional oversight.

Agritourism

ADA Compliance & Accessibility

As farms open to the public, accessibility becomes a central operational consideration.

Among respondents:

- **21.1%** report full ADA compliance
- **42.1%** comply with **some but not all** ADA requirements
- **15.8%** report no ADA compliance
- **21.1%** are unsure

Insight

ADA compliance across lavender farms is **uneven and often incremental**, particularly among smaller operations. Common barriers include uneven terrain, historic structures, and the cost of infrastructure upgrades. At the same time, many farms report gradual improvements such as accessible parking, restrooms, or modified pathways.

The large share of partial and uncertain responses suggests a need for clearer guidance, practical examples, and phased compliance strategies tailored to lavender farms rather than one-size-fits-all solutions.

Strategic Implications for the Lavender Industry

Taken together, these results suggest:

- Agritourism offers **meaningful revenue and marketing benefits**
- Adoption is constrained by **regulatory, zoning, insurance, labor, and accessibility challenges**
- Many farms are navigating these challenges gradually rather than all at once

For USLGA, agritourism represents both an **economic opportunity** for members and a **policy and education frontier** where targeted resources can materially improve outcomes.

Thank you for exploring the results of the USLGA Annual Survey.

The 2025 USLGA Business Operations & Harvest Survey was created over a decade ago to collect data from our growers and enabling us to share their collective experiences in our 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.

We like to take this moment to thank you for being a member of USLGA as we build a supportive community dedicated to shared learning, growth, and long-term success as we bring the mission and values of our association to life in every U.S. lavender farm.

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: <https://www.uslavender.org>