

The Latest USDA Numbers; Charlie on Our Industry; Jen in Costa Rica

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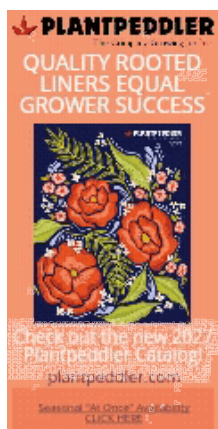
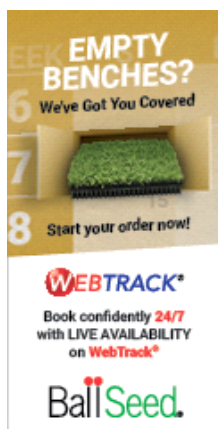
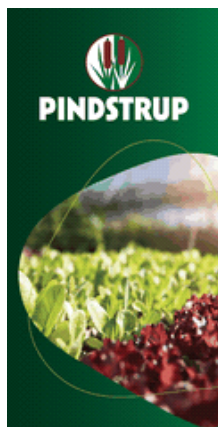
News and Commentary from GrowerTalks Magazine

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Marvin's USDA Stats update



Once again, like a kid at Christmas, Ball's in-house hortistician Dr. Marvin Miller has torn into the latest USDA Floriculture Crops Summary with undisguised delight. Here's his initial analysis of the data:

The U.S. Department of Agriculture's National Agricultural Statistics Service (USDA/NASS) has released its [Floriculture Crops: 2025 Summary](#). The 2025 survey had **11,728 respondents**, 466 more (4.1% more) than the 2024 report. This is the third year in a row we've seen more respondents, as previous reports saw 1,046 new respondents added in 2024 and 1,267 respondents added in 2023.

These added respondents represent a very encouraging sign for the report overall, as more participation always yields a better picture of the industry. And everyone, from USDA to other Federal, state and local government entities (e.g., the U.S. Department of Labor, the U.S. EPA, the U.S. Trade Representative and even The White House, etc.) from our trade associations to our politicians from universities, community colleges and even high schools debating which programs to fund to industry suppliers of not only production inputs, but also capital and credit markets and more use this data to make decisions affecting our industry.



At the same time, the addition of respondents warrants using an extra bit of caution when interpreting the results, especially when those being added to the ranks of cooperating respondents are larger players. In 2023 and 2024, the numbers of smaller growers—those with wholesale sales of less than \$100,000—increased dramatically, from 2022's 5,481 to 2024's 7,275 (up 32.7% over those two years). And though the Floriculture Crops Summary doesn't report which crops these smaller growers produced, other data suggests that many of these folks are new cut flower producers that we've welcomed to the industry.

In contrast, in the 2025 report, the 466 additional respondents, combined with some smaller growers who've gotten bigger, have swelled the ranks of larger growers (those with sales of \$100,000 or more) to 4,708 larger growers. In 2024, only 3,987 larger growers responded. This is an 18.1% increase in large grower numbers (721 more larger growers).

Furthermore, the 2025 report shows a dramatic 31.4% increase (463 growers) in the subset of



these large growers who reported sales of \$500,000 or more. It's through this lens of substantial increases in large grower respondents that the rest of the data should be viewed. And, again, it should be recognized that these additional respondents, no matter their size, help to make for a better report!

Sales

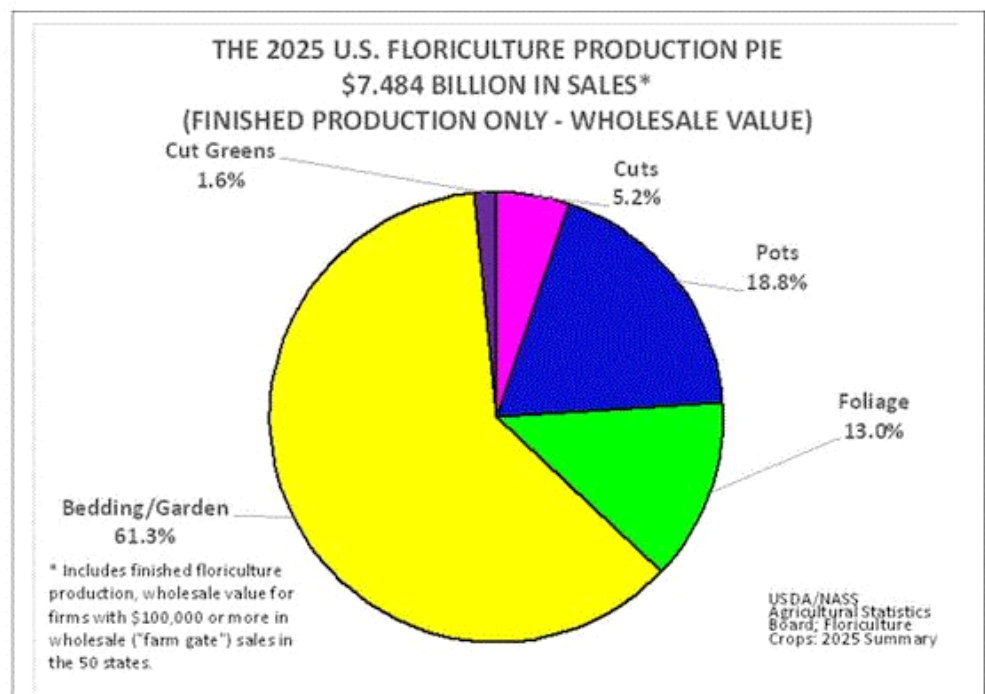
Overall, the 2025 report shows an increase of 17.9% in grower sales, which have risen to an estimated **\$8.395 billion**, up from the estimated \$7.122 billion reported for the revised total for 2024. (USDA estimates sales for the smaller growers based on these growers indicating the range in which their sales fall.)

For the larger growers—again those with sales of \$100,000 or more—actual reported sales were \$8.128 billion, up from the 2024 revised number of \$6.848 billion. This 18.7% increase, in light of the 18.1% increase in large grower numbers, seems quite appropriate considering what the industry has experienced over the last two years.

Examining the finished floriculture sales, i.e., removing the sales of propagative materials and prefinished plants (since they get counted as finished plants), we see \$7.484 billion for 2025, an increase of only 14.6% above the \$6.532 billion (revised) reported for finished floriculture sales for 2024. Considering the 18.1% increase in large grower respondent numbers, this 14.6% increase is a bit unsettling.



Slices of the Pie (USDA Summary continued)



Recognizing that we only have crop-by-crop detail from those growers with sales of \$100,000 or more in this survey, we see increases across the industry, with the lone exception being the cut flower segment. Reported cut flower sales in 2025 were \$389 million, down 6% from the 2024 figure of \$414 million. This followed two years of increases (an 18.3% increase in cut flower sales

in 2024 and a 5.1% increase in 2023), so this could be a bit of a correction.

At the same time, we know that more and more cut flowers are being grown by small growers who are often serving their local markets. Many of these growers are also only seasonal providers, opting to grow in fields rather than investing in greenhouse facilities.

Sales of cut greens were \$122.0 million in 2025, up 61.4% from 2024's \$75.6 million and following three years of declines. Florida cut greens producers, under normal conditions, account for the vast majority of our industry's cut greens sales, but these producers have been plagued by a series of hurricanes in recent years.

All other industry segments saw sizeable increases in reported sales. Sales of potted flowering plants were \$1.407 billion in 2025, up 12.1% from the 2024 figure of \$1.255 billion. Reported sales of foliage plants were \$974.9 million in 2025, up 6.1% from 2024's \$918.5 million.

The bedding/garden plant segment really benefitted the most from the 18.1% increase in the respondent numbers, as evidenced by the 18.7% increase in 2025 compared to 2024. Reported sales of bedding/garden plants were up \$722.8 million to \$4.591 billion from 2024's \$3.869 billion. Sales of annuals rose 22.3% to \$3.119 billion, while sales of perennials were up only 11.6% to \$1.472 billion. Overall, annuals represented 67.9% of the segment's sales in 2025, up from 65.9% of the segment's sales in 2024. Sales of perennials were 32.1% of the segment's sales in 2025, compared to 34.1% in 2024.

With the over 22% increase in annuals and the over 11% increase in perennials in 2025, the share of the total finished floriculture industry's pie represented by the bedding/garden plant segment increased from 2024's 59.2% to 61.3% of the 2025 pie.

As the analysis continues, there will be further details from this report.



Two more from Cultivate: Charlie's SOI and our video

While I was breakfasting with some industry notables, Jen Polanz was in the big ballroom to cover the annual AmericanHort State of the Industry Address. Here's what she learned:

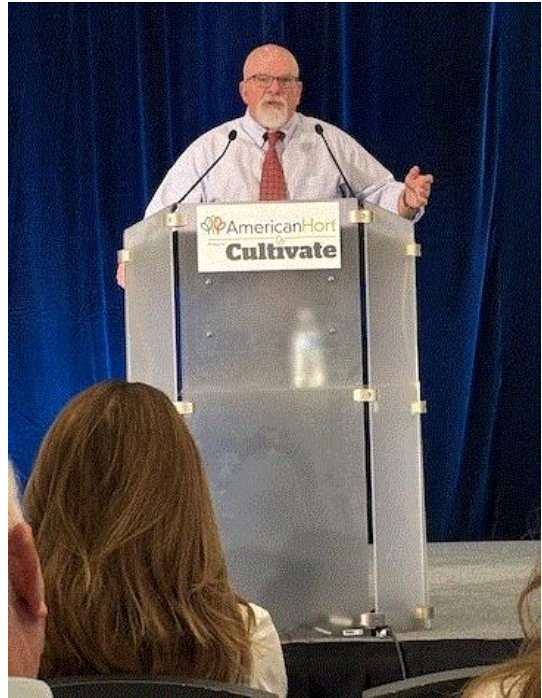
What IS the state of our industry?

The great thing about Dr. Charlie Hall's annual State of the Industry report at Cultivate is the ability to compare where we are currently versus the past and to get a data-driven glimpse at where we may be heading. I say *may* because, well, the future isn't certain (it never is).

But first, the past. Charlie, an esteemed professor in the Department of Horticulture Sciences at Texas A&M University and holder of the Ellison Chair of International Floriculture, reports that 98% of growers are up in gross sales dollars this year compared to 2019, and six in 10 growers were up more than 25% over that 2019 number. Why 2019 and not just year-over-year? Because that's the pre-pandemic baseline and it shows that while growth year-over-year for the past five years has decelerated, there's still growth and the trend is still positive.

Charlie said we're in an interesting cycle of growth, plateau, growth, plateau and so on. For growers, pricing increases continues to drive the growth, while unit sales are flat. On the retail side, it's a similar story, with increases in average ticket driving growth, but transaction counts staying flat to just slightly up.

Charlie likened the 2026 season not to a home run, but a stand-up double—not pandemic-era numbers, but still solid.



Looking forward at his recession dashboard indicators and other data, there's both good news and potentially bad news. The good is while consumer confidence is down, spending doesn't reflect that, with consumption up 2.4% and household income increasing at the top of the "K" in the K-shaped economy.

"How we feel does not equal how we spend," he told the audience. "Consumer confidence is not really something I care about. I don't care about how we feel; I care about how we spend our money."

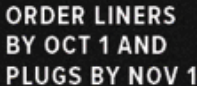
The not-so-great news is that inflation appears to be sticky and the Fed may not move on it either way (if they do, they may raise rates slightly, Charlie said). We aren't building a lot of new houses right now, with 30-year mortgages at 6.43% (Charlie noted here to be prepared with trees and shrubs for when those rates go below 5% to meet latent demand), and some key inputs will be increasing. He forecasts the top increases for 2026 will be:

- Fuel/energy +10%
- Fertilizer +8%
- Freight/trucking +6%

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And then there's the Strait of Hormuz ... (Charlie continued)

"That is the critical pinch point," Charlie said. "If you want to know whether or not we're going into a recession, you tell me what's going to go on with the Strait. Because if it deteriorates rapidly, we're talking about global recession. If we get it straightened out, then now we're talking about another favorable economic climate for 2027."

The scenarios are that, if the Strait gets figured out, and if new renegotiated Section-301 tariffs

aren't any worse than what we have right now, the result will be a 2.5% increase in input costs for 2027. But if the Strait isn't straightened out and the tariffs are higher than now, he estimates input costs will increase 4.4%, or up to 5.4% for next year.

More good news: The risk of recession is low, based on current data; Charlie has built himself a handy dandy Claude AI-driven daily assessment of recession risks to help him keep a watchful eye on it.

Of course, all of the above—inflation, the Strait, recession—is out of our control. What IS in our control is how we respond.

Charlie recommended making sure you understand and defend the value proposition of your company and products (especially the health and wellness aspect of our plants), and home in on your operational efficiencies and automation to really get your production costs dialed in. He also recommended taking a look at your SKU rationalization to see which products can carry more of your input increases with increased margins.

"We have to, as an industry, continue blowing our own horn in terms of the health and well-being benefits that we bring," Charlie said, adding that it's a topic HRI has research on. "Because when you look at consumers, it's not the environmental benefits that carry the day anymore. ... Particularly with Millennials ... the number-one benefit of plants and green spaces in their mind is all about health and wellness."



Our Cultivate'26 video is now on YouTube



Fresh from the editing bay comes "High-Tech (and Pretty Plants) from Cultivate'26." Osvaldo and I walked the show to capture some highlights of the event in the form of new machines and tools, plus new plantable biopots, an AI assistant you wear on your head (laser bug zapper not yet included) and even some new plants as chosen by the Garden Center Group's team of experts.

Check it out [HERE](#).



Jen and Osvaldo visit Costa Rica

This next piece is from Editor Jen Zurko, who recently traveled to Central America to visit PanAmerican Seed's Linda Vista farm in Costa Rica with videographer Osvaldo Cuevas to shoot some video for a project. Here's her report—I give her much credit for not mentioning the spiders until the very end, as they had her pretty freaked out!

Right before Cultivate, Osvaldo and I had the good luck of being invited to visit Linda Vista, **PanAmerican Seed's** production farm in the Cartago Province of Costa Rica.

Linda Vista was founded in 1955 by Claude Hope, the “Grandfather of Impatiens.” Claude sold the farm to PanAmerican Seed in 1981, but he remained active there until his death in 2000. Linda Vista has since expanded to three farms totaling nearly 300 acres, with about 600 employees. Linda Vista produces 2.4 billion seeds per year—about 40% of PanAmerican's total seed production.



Linda Vista has been working on updating all their greenhouses, removing the old wooden structures and installing new roofs, concrete flooring and adjustable benching. New digital climate controls eliminate the need to manually open and close the greenhouse roofs (which required 200 turns of a crank handle—oof!).

The name Linda Vista means “pretty view” in Spanish, which is fitting, as all three farms have breathtaking views of the mountains and the still-active volcanoes dotting the Costa Rican landscape. With a direct view of the Irazú Volcano, Farm 3 (as they call it) has the highest elevation of all the farms, which provides the cooler, more temperate climate needed to grow cool-weather crops like pansies, violas, delphinium and matthiola. The other two farms in the lower valley are where PanAmerican produces seed for all of its other crops, including Wave Petunias and Beacon Impatiens.



The original farm was called Linda Vista because of the beautiful mountain scenery, but I have to say Farm 3—which was originally a rose farm and is at the highest elevation of the three—has a pretty sweet view.



Costa Rica (continued)

Linda Vista has changed a lot over the years, always evolving to utilize the latest technology and growing practices, while still adhering to some of the traditions that continue to make them a successful source of seed for PanAmerican's customers all over the world.

For instance, the growing team uses a drone to count buds and flowers on the stock plants so they know how much harvesting and pollination labor they'll need and in what area of the greenhouse. About 70% of their pest management program uses biological controls for pests. And a newly installed water recirculation system captures leachate water collected from the greenhouses, then treats it with oxygen and UV to remove any diseases and viruses.



In the Beacon Impatiens greenhouse, Darwin operates a drone to count buds and flowers easier and quicker than on foot. This way, they know how much harvesting and pollination labor they'll need and in what area of the greenhouse. Codes on the poles help Darwin plot out the drone's paths around the greenhouse.

Linda Vista isn't just about seed production— they provide a number of services across the three farms, including a tissue culture lab where they produce what will become mother stock for vegetative plants. One of their biggest customers is sister company Ball FloraPlant, whose Las Limas production farm is in Nicaragua.



Vacuuming pollen from petunias, which is collected in vials and sent to the pollen lab to be tested before it's used for hand pollination.



Osvaldo all suited up to enter the salvia house, which includes multiple beehives (he was stung several times in spite of the suit; they snuck in around his ankles). Where feasible, PanAmerican uses honeybees to do the pollination for them, cutting down on hand labor. They maintain 40 hives year-round.



Silver Falls Dichondra continues to be one of the most popular component plants that PanAmerican Seed sells, but trying to get the volume of seed with a higher germ threshold to meet the demand has been a challenge. They're still working on increasing the germ rate, but they can now reliably supply dichondra seed to the market. They used to have to manually shake the plant to get the seeds to fall into the netting below, but now they have a vacuum-like tool to help harvest the seed. But just in case, the netting is still there to catch any stragglers, which has helped boost the supply.

Besides the giant huntsman spiders that wanted to camp out in my bedroom, it was a great visit. PanAmerican has wonderful, dedicated people working at Linda Vista who are always looking at ways to improve their systems and come up with new ways of providing the highest quality of seed with the best supply. I found them to be friendly, fun and inspiring.



USDA to launch AI crop innovation challenge

The U.S. Department of Agriculture wants to speed up progress in plant science, so they're asking universities and stakeholders to help build new AI tools that can translate the huge amount of germplasm data the agency collects. It's part of the government's "Genesis Mission," which is bringing together America's scientists, top businesses, universities, production plants and national security sites—to use AI tools to solve the nation's most complex science and technological challenges.

Plant breeding fits into that and the Agricultural National Science & Technology Challenge will ask innovators to create practical solutions that pull together different types of information—including images, field data and lab results—so scientists can quickly spot important plant and seed traits, and develop crops that are more resilient and productive. The Challenge is expected to be announced later this year,

"USDA is taking concrete steps to give scientists the modern tools they need to innovate

agricultural solutions from the vast plant data that they collect,” said REE Under Secretary and USDA Chief Scientist Dr. Scott Hutchins. “When our partners help us to solve agricultural challenges by using AI tools, we’ll unlock faster discoveries with germplasm data and grow better crops that strengthen our food system for many future generations.”

We’ve all heard that AI is supposed to dramatically speed up scientific discovery, and it’s nice that it’s being applied towards crops, especially because what starts in corn and soybeans usually trickles down to ornamentals—and that can include pest, disease and drought resistance.

More details on the Challenge are forthcoming. Proposing teams are encouraged to read the full [Genesis Mission Executive Order](#) and bring their best ideas to advance America’s future in germplasm innovation.



Sign up for Colorado Destination Days

If you’re out in the mountains, you might want to drop in on Colorado Destination Days, four days of annual and perennial trials Monday, August 3 to Thursday, August 6. There are four stops—Denver Botanic Gardens (Monday), Colorado State University and Gulley Greenhouse (Tuesday), Blooma Farms and Dutch Heritage Gardens (Wednesday), and Chatfield Farms (Thursday).



Visit a few or visit them all—you'll meet breeders, product managers, growers, retailers, suppliers and horticulture professionals from across the region and the globe to learn more about the new plant varieties and horticulture products available. For instance, in the CSU Annual Trials, they have nearly 1,000 annual trial entries planted between ground and containers, with dozens of new varieties. In their three-year Herbaceous Perennial Trials, they're evaluating more than 300 different perennials—more than 100 of them new for 2026.

You need to register for each trial you'd like to visit, but it's easy—just click [HERE](#) to get all the details you need.

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Register now for Farwest

It's the biggest show in the Pacific Northwest (which as a region scored 7.7 for the season in my weekly sales survey), so don't miss the [2026 Farwest Show](#), slated for August 23-26 at the Oregon Convention Center in Portland, Oregon. Register by July 31 to take advantage of the early bird deadline (hey, it's worth up to \$30!).

There's a lot to take advantage of outside of the great trade show, including a new two-hour Automation Summit on Wednesday, with five experts talking nursery automation. It's free to all

registered attendees and is part of the 45 hours of expert-led seminars across three days and five career tracks. Another free session is the opening-day keynote by renowned green industry economist Dr. Charlie Hall.

Then there's the networking, including the Farwest Happy Hour on Wednesday and the legendary Pub Crawl on Thursday.

Learn more [HERE](#).



Finally I ...



Mathieu van der Poel throws his bike across the line to win stage 21 of the Tour de France in Paris as teammate Jasper Philipsen cheers him on and takes second.

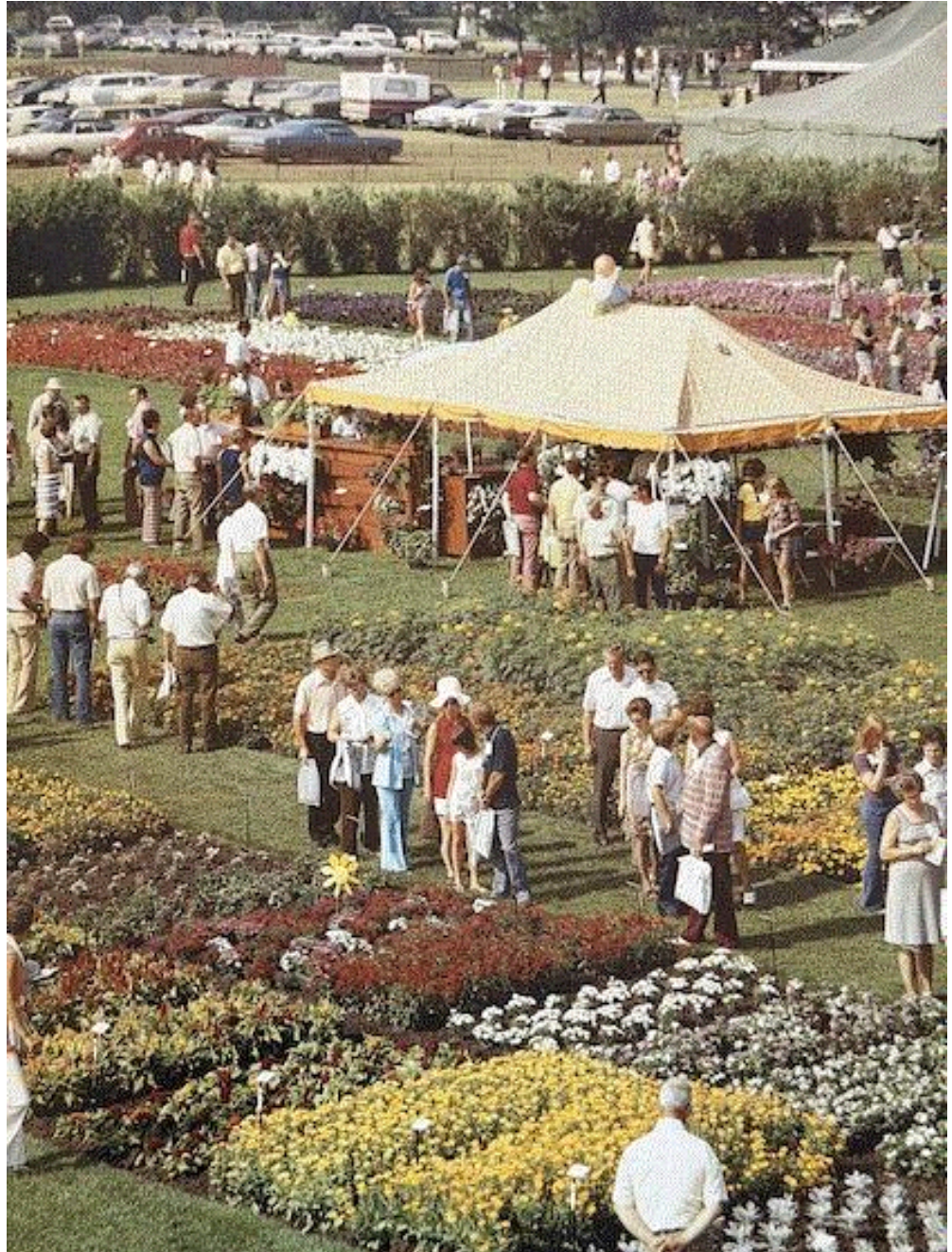
Congratulations to the Alpecin-Premier Tech professional cycling team for three stage wins in the Tour de France, including a nail-biter 1-2 finish in the final stage in Paris. Some say it was the best final stage finish ever for the Tour de France!

Premier Tech is one of our top-notch Canadian peat moss suppliers; I [wrote](#) about my visit to one of their Quebec bogs a few years back, you may recall. It was then that I learned that Premier Tech has been involved in cycling for more than 30 years, to support the development of Quebec and Canadian cyclists. They've sponsored a UCI World Tour team since 2017.

President and CEO Jean Bélanger is a big cycling fan and long-time rider himself; he believes cycling promotes health and wellbeing and is a great way to connect with people. That's why you'll often see Premier Tech employees on the weekends riding from their Riviere-du-Loup office in their blue team jerseys.



Finally II ...



Where am I off to this time? Up to West Chicago and the Mothership for Ball Seed Customer Days on Thursday and Friday, July 30 and 31. It's a must-attend event that's been going on since the 1950s, when growers would grab their fedoras and load the little woman and the kiddies into the Studebaker and head out Roosevelt Road for a full day of flowers, fellowship and fun. And food—a hearty hot lunch is always included with the free admission.

Look for me roaming the gardens, snapping pictures and chatting with the folks on both days!

Heliopsis 'Forged in Fire'
New to Proven Winners
Perennials for 2026-2027!



Feel free to email me at beytes@growertalks.com if you have ideas, comments or questions.

See you next time!

Chi

Chris Beytes
Editor-in-Chief
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