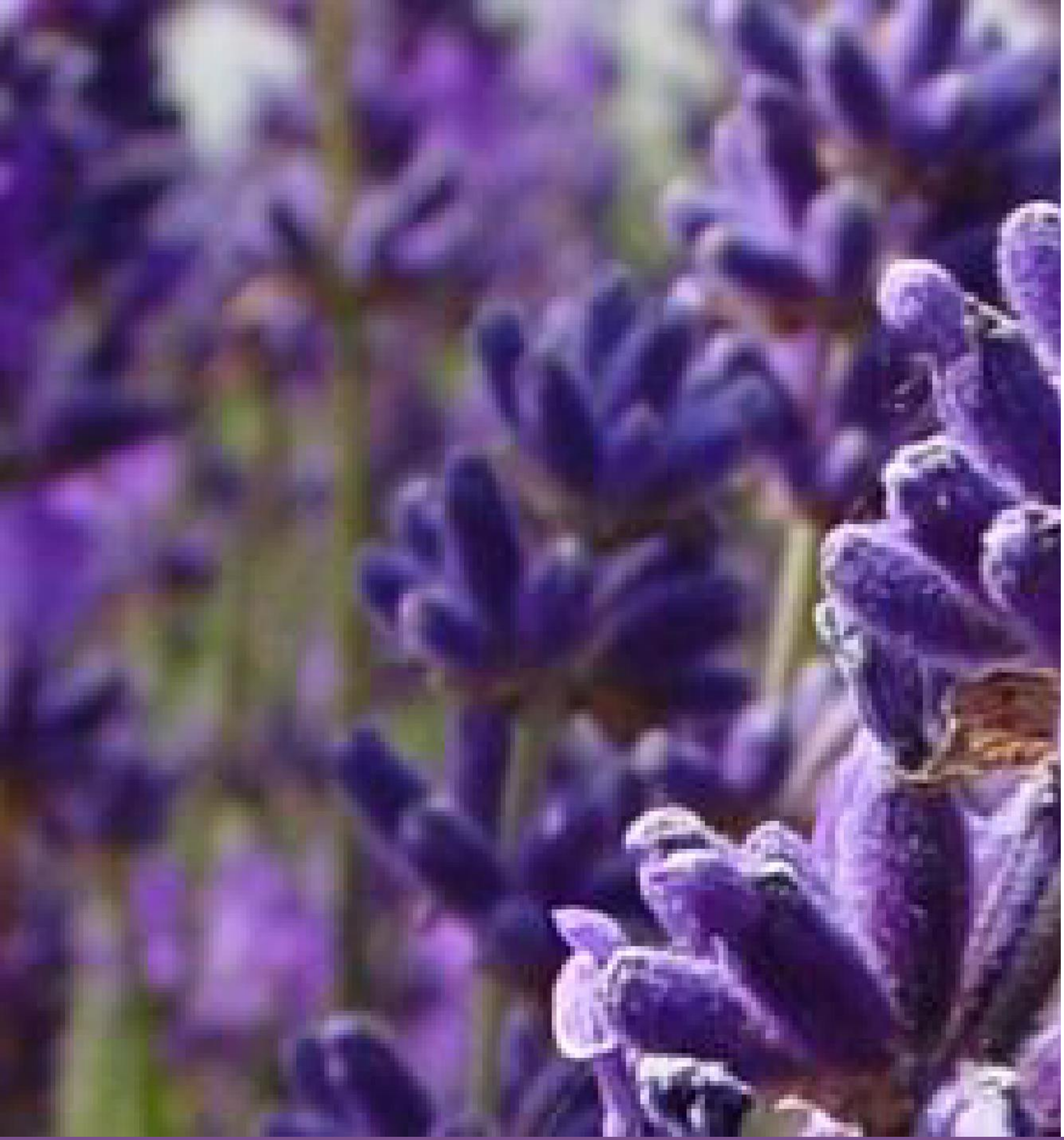

2024 USLGA Business Operations & Harvest Survey Presentation

Education & Research Committee

United States Lavender Growers Association (USLGA)

The USLGA was formed over 10 years ago with a goal of supporting the lavender industry in the United States and the hope of having 50 members. Today, we have almost 600 members and annually we update what we know about our membership using feedback from our Annual Business Operations & Harvest Survey.

Our survey is important to our members, and to all lavender growers nationally. The Reason? To effectively promote our industry, we need facts and figures on the breadth of our farms, the crops we have and how we grow, harvest and process them, as well as the production of value-added products. The economic impact of all of these is crucial to our being able to have a voice in national issues that affect lavender farming.

As time goes on, more surveys will result in deeper, year over year, data, and we hope to use this information to make a positive impact on the lives of people and the economy of all our members' farming and production efforts, as well as resonate that impact throughout the U.S. lavender industry.

In 2024, we captured a comprehensive update of lavender business operations and harvesting and share the results of our respondents in the following presentation.

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Abstract 2024 Annual Survey

The United States Lavender Growers Association (USLGA) Business Operations & Harvest Survey was conducted in Fall 2024. Based on 573 current USLGA members, the 123 survey respondents yielded a response rate of 19.7%, with 92.6% of this representing current members.

Demographics showed the Northeast region had the most survey participants at 31%, however, according to the survey, the states that reported the most lavender farms are California, Washington, Michigan, New York and Oregon. 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 87% of survey respondents are 45+ years of age or older, and age group 35-44 grew by 5% year over year, with no respondents reported age 18-34 this year.

Farm operations shows 44% respondents indicated friends and volunteers supported their farm's workforce needs, up from 21% in 2023. In 2024, the average number of employed associates was 2 per farm. Harvest data by the one hundred and twenty-three growers (123) amounted to 20.3 Tons of lavender focusing on x-Intermedia (15K+ lbs.), Angostifolia (6K lbs.), and other cultivars (148 lbs.) depending on their business objectives. In 2024, **158+** Acres of lavender were reported in production. Survey respondents had a total of two hundred and forty thousand (198,000+**) plants in production** and produced over 683,000+ Bundles. In our survey, one hundred and thirty-eight (138) **gallons** of essential oil, nearly 9,000 ounces, were produced. Additionally, we calculated 2,100+ Gallons of collected hydrosol in 2024.

Product offerings reported by respondents show Dried bud (97%), Fresh (83%), Personal care (67%), Culinary (63%), Home products (59%), Essential Oil (58%), Hydrosol (51%), Agritourism (39%), Photography hosting (37%), Outsourced Items (30%), and Educational Seminars and Workshops (30%), with the other categories less than 25%. . For **agritourism**, 31 of survey respondents welcomed over one hundred and twenty-one (121,000+) visitors to their farms in 2024. The Northeast region was the most active in agritourism, however, the Southwest lead in reported visitor counts overall. **Marketing and sales** reported by respondents show the following as most successful activities: Direct from Direct from farm sales (70%), Farm website (54%), Word of mouth (54%), Events held by others (46%), Farmers Markets (43%), Social media (40%), Agritourism (14%), Retail store (39%), Online sale sites (38%), Social media site sales (34%), Email (23%), Other (16%), and Print Ads (6%).

Revenue for 2024 amounted to $1,731,000 MM in total sales as reported by 38 survey participants for an average reported revenue of approx. $52,457 per respondent. Of reported revenues, 37% were attributed to Value-Added product sales ($45K average p/respondent), 22% were attributed to Direct to Customer sales for an average ($24K average p/respondent) and 15% were attributed to Wholesale sales ($30K average p/respondent), with 10% attributed to Event/Rental revenues ($4K average p/respondent), and Export Sales less than .5%.

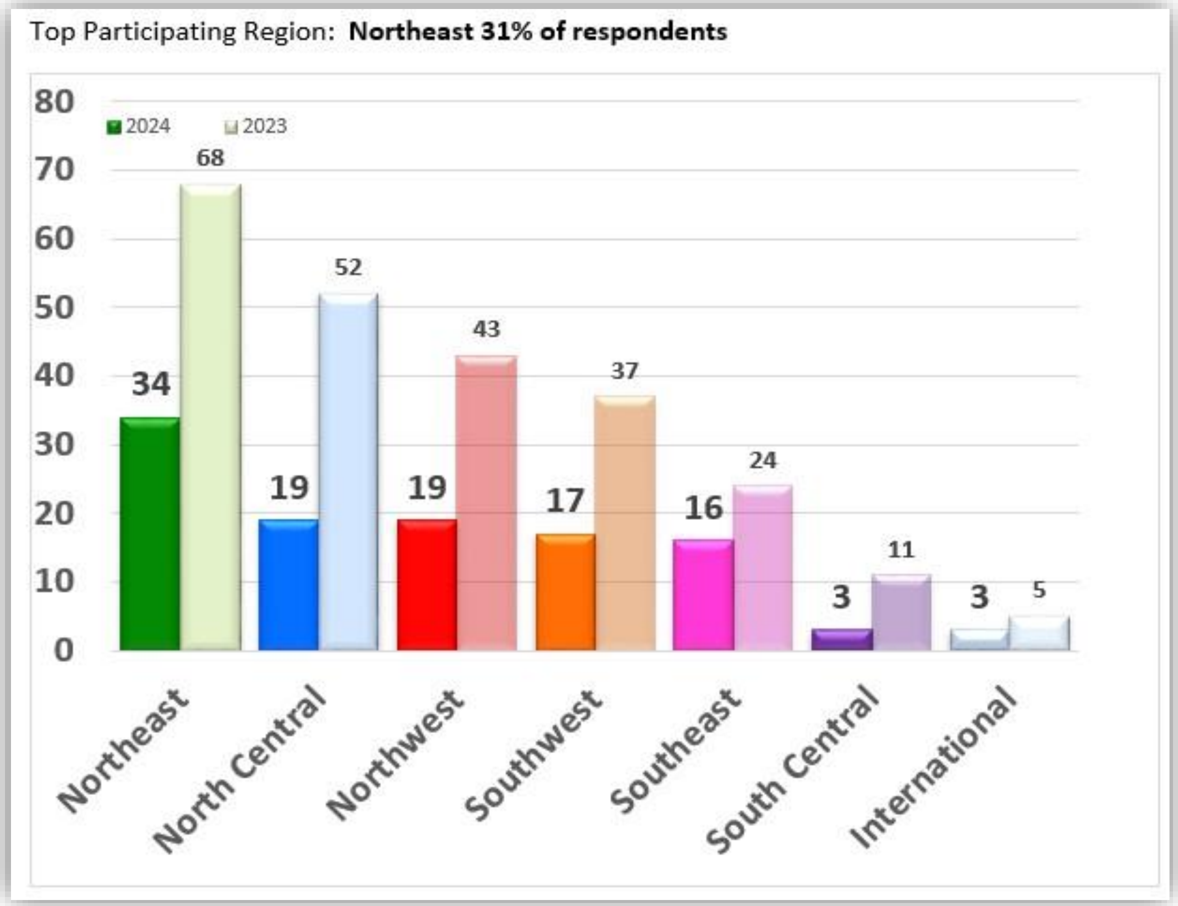
Demographic Survey Questions

- What state is your lavender farm/lavender business located?
- In what USLGA region are you located/operating?
- Survey respondent's age?
- Years operating a lavender farm/lavender business?
- Are you a current USLGA member?
- Are you a member of any lavender/trade related association?
- Would you like to receive USLGA membership information?
- What would most inspire you to join USLGA?
- Do you harvest crop, produce essential oil or distill?
- What is your U.S. hardiness zone?
- What is your elevation in feet?
- What is your precipitation average in inches?
- USLGA Regions Map: (https://uslga.memberclicks.net/uslga-region-info)

Demographics – Responses By Region

USLGA distributes its Harvest survey annually in Fall. In Fall 2024, USLGA sent the Business Operations & Harvest Survey to its 573 current members, and to affiliate lavender growers, and businesses.

We received 123 responses, representing a 19.7% rate of response, 92.6% from USLGA members. Northeast was the top participating region with 31% of survey responses.

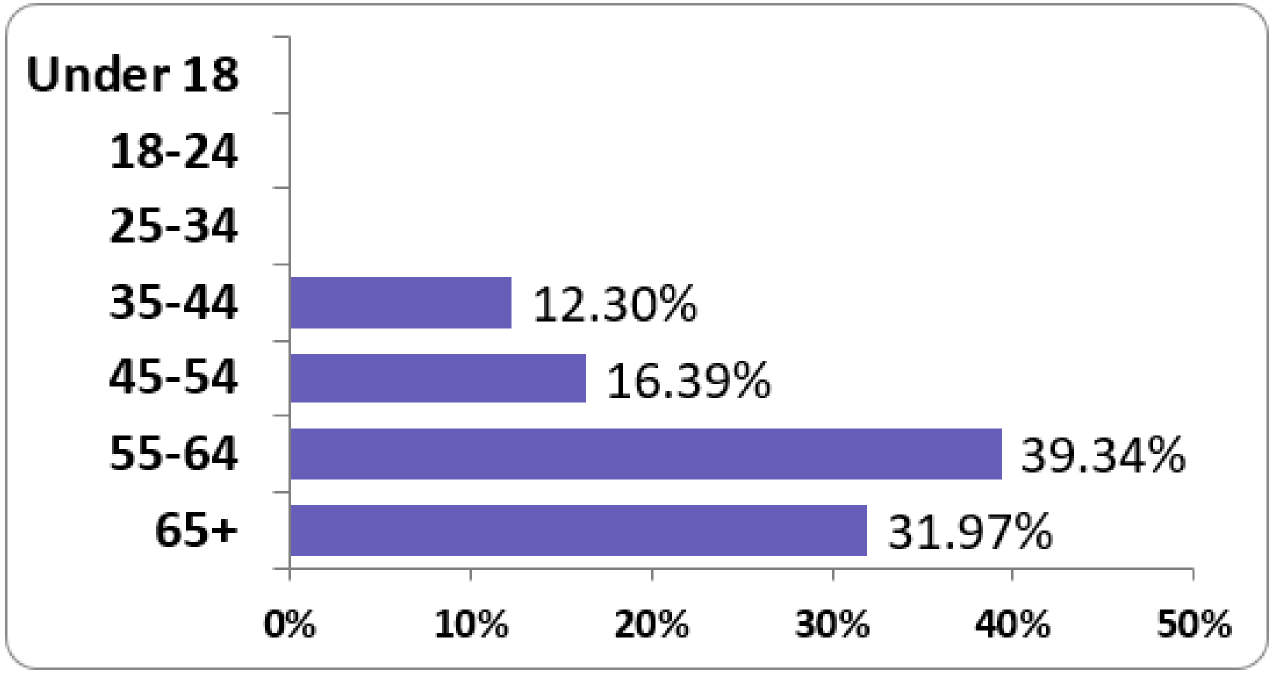


(Northeast 31% of respondents N=111)

Demographics – Responses By Age Group

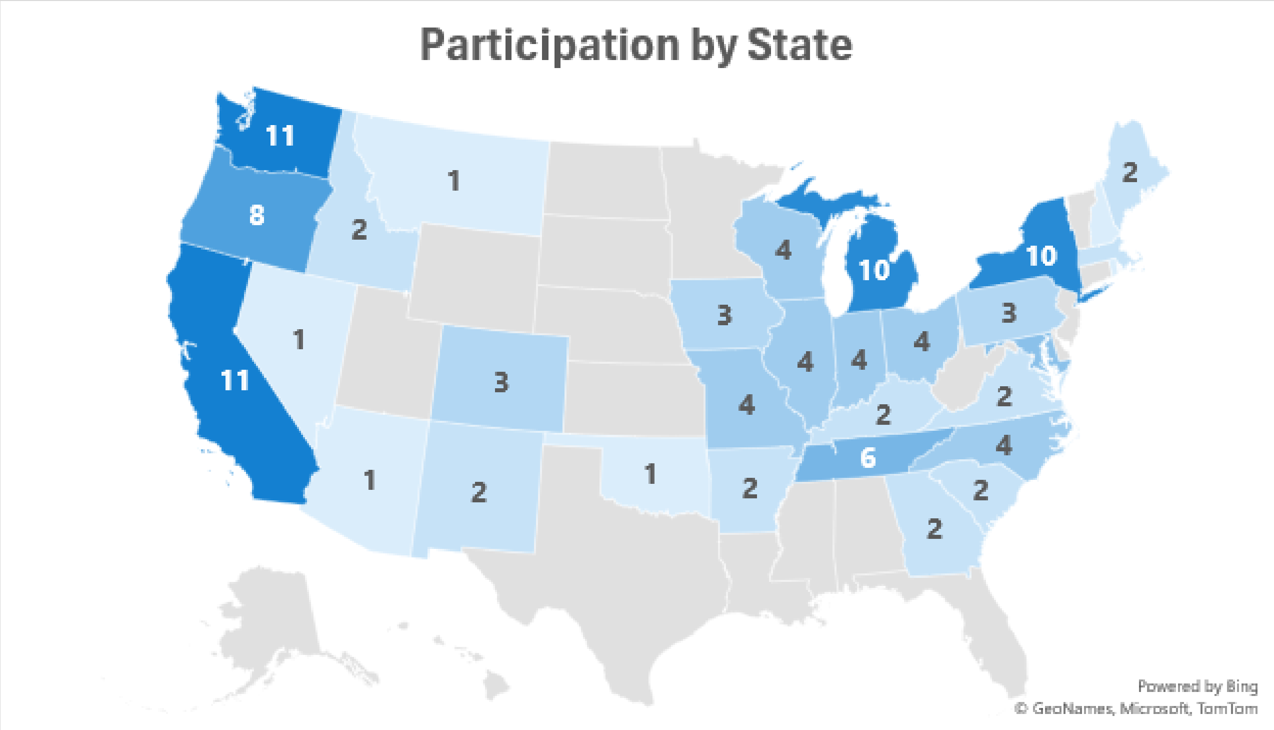
More than 87% of respondents are 45 years or older. Age 35-44 respondents grew their representation by 5% year over year, with no respondents age 18-34 participating this year.

Age	Count	% representation
18-24	0	0%
25-34	0	0%
35-44	15	12.3%
45-54	20	16.4%
55-64	48	39.3%
65+	39	31.9%



(92.6% of respondents are current USLGA members (n=113))

Demographics – Responses By State



Top 5 States reporting (n= 118)

	count	% of total respondents
California	**11**	**9.32%**
Washington	**11**	**9.32%**
Michigan	**10**	**8.47%**
New York	**10**	**8.47%**
Oregon	**8**	**6.78%**

No participation from:

Alabama	Louisiana	South Dakota	West Virginia
Alaska	Minnesota	South Carolina	Wyoming
Connecticut	Mississippi	Texas	
Florida	Nebraska	Utah	
Hawaii	New Jersey	Vermont	
Kansas	North Dakota	Washington DC	

(Top 5 States reporting (n=118))

Demographics - 3 International Respondents

Cork, Ireland
(1 respondent)

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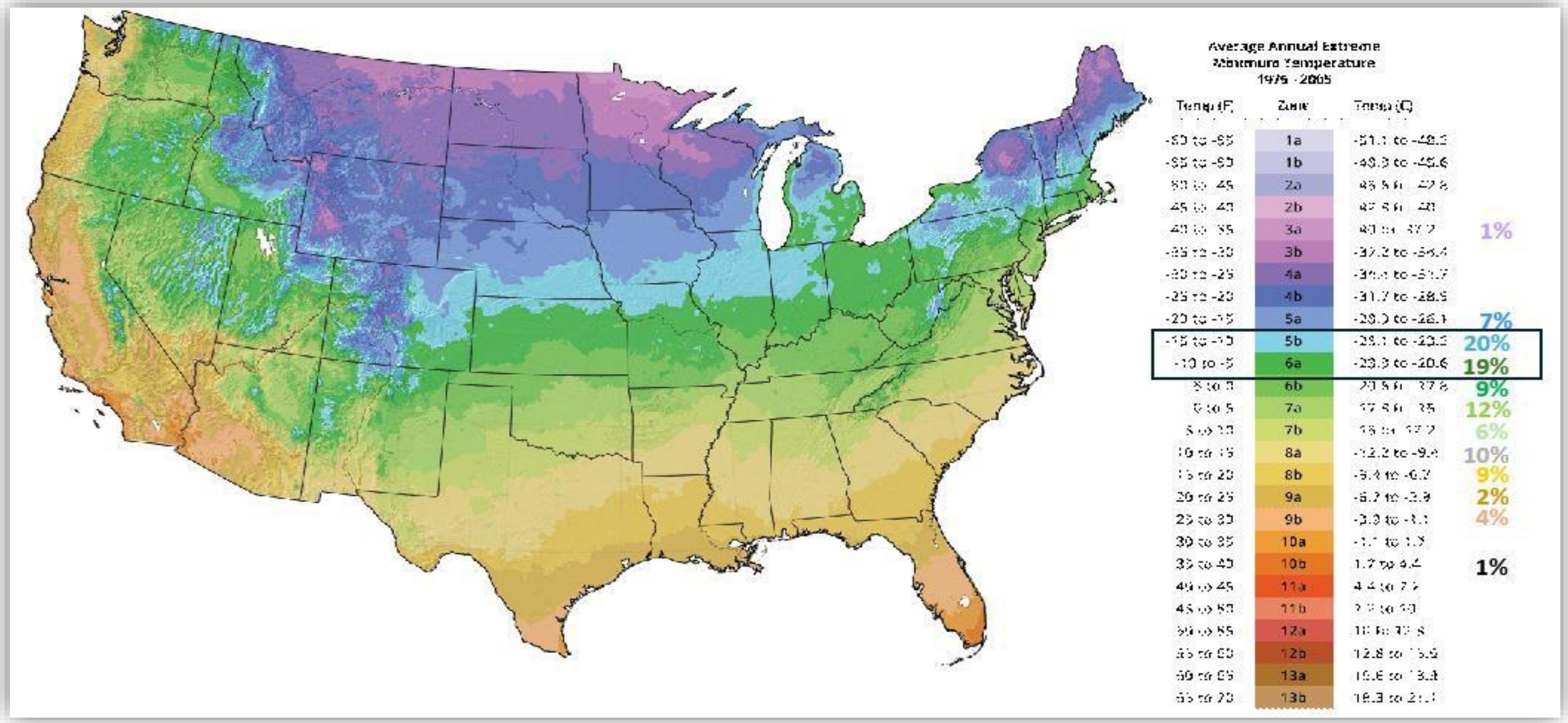
Dolores Hidalgo,
Guanajuato State, Mexico
(1 respondent)

Ontario, Canada
(1 respondent)

Demographics – Hardiness Zone Map

Key Insights: Nearly 40% of all survey respondents reported operating in USDA Hardiness Zones 5b & 6a. Zone 5b is generally known for its cold winter season and a moderate summertime growing season. Zone 6a includes the Pacific Northwest, lower regions of the Midwest, and areas in the Northeast, and Western mountainous regions. Another 12% are reported in 7a, and 10% in 8a. No respondents reported operating in zones:

1a, 1b, 2a, 2b, 3b, 4a, 4b, 10a, 11a, 11b,12a,12b,13a,13b.



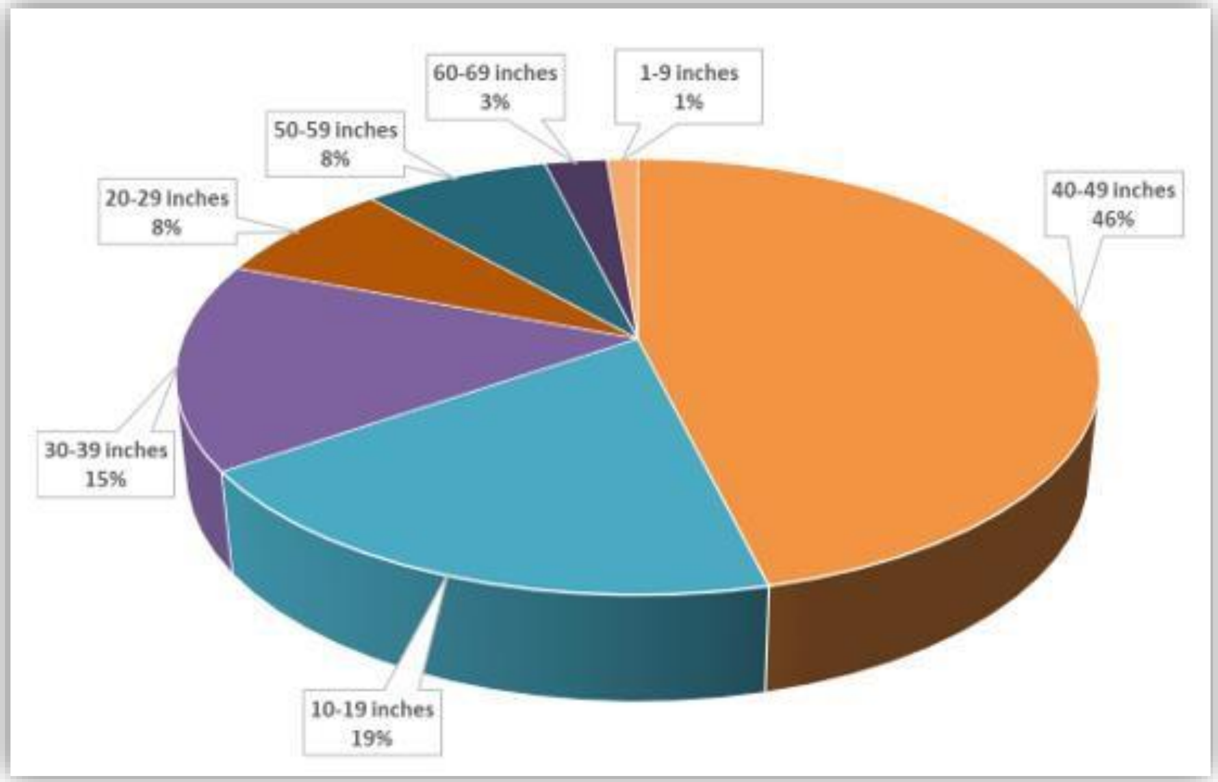
(Hardiness Zone Map (n=81, 66% response)

Demographics – Respondents Precipitation Range

Key Insights:

- Nearly half of all survey respondents experience 40-49 total inches of precipitation while 1% of respondents manage on less than 10 total inches of precipitation, and 11% have 50 total inches or more per year.

- The variability of reporting for both hardiness zone and total precipitation emphasize the importance of developing meaningful networks within USLGA who share like growing conditions and face like environmental challenges.



(Hardiness Zone/Precipitation (n=81, 66% response rate))

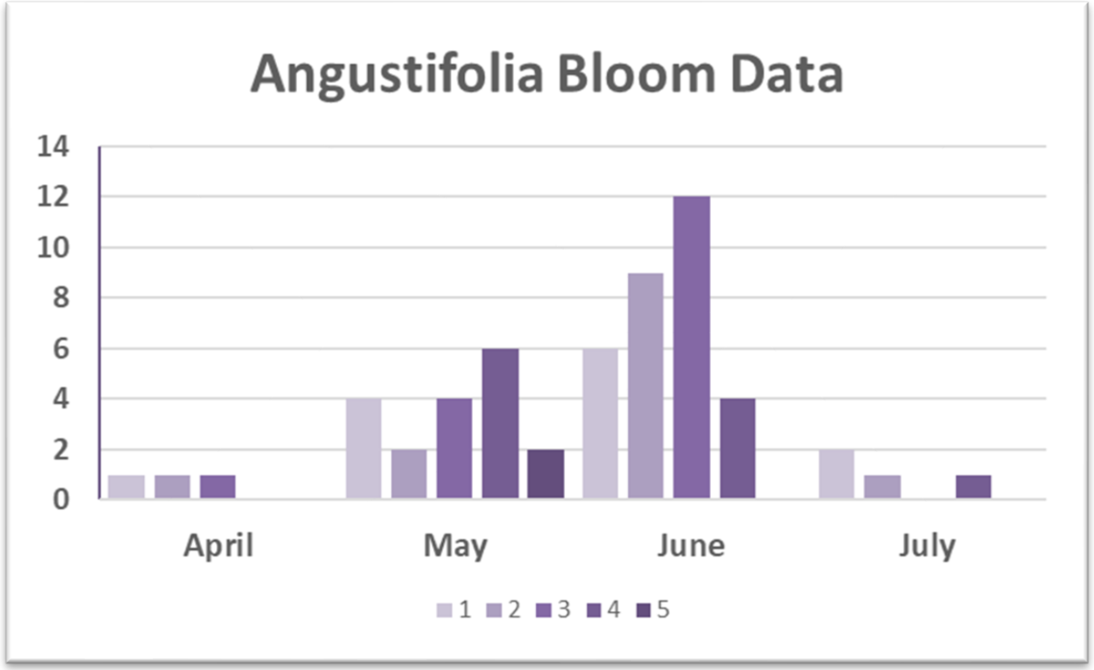
Harvest Production Survey Questions:

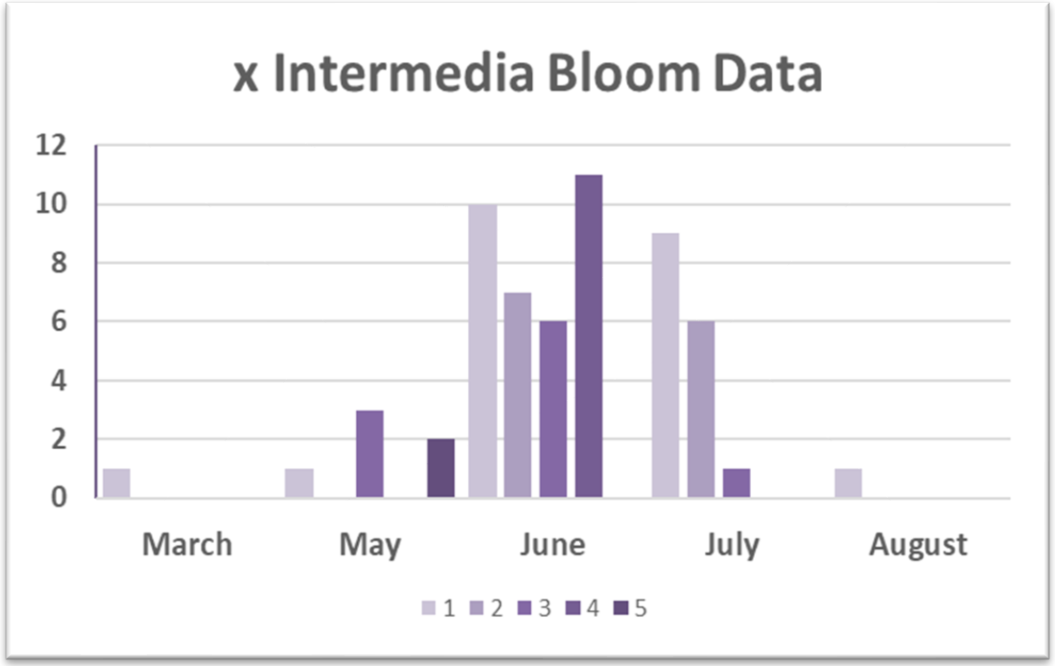
- What Month/Week did the majority of your cultivars begin to bloom?
- Number of acres in lavender cultivation?
- Number of Lavender plants in production on the farm?
- What was your total fresh lavender harvest in pounds?
- How many bundles did you harvest?
- What is your average bundle weight in ounces?
- If you reported Angostifolia harvest, what percent of harvest was for culinary purposes?
- What was your total lavender harvest in pounds for distillation?
- What is your total lavender essential oil in ounces?
- If you retain your hydrosol from distillation, what is your total hydrosol production in gallons?
- What is your method of harvest?
- If machine harvested, please list brand, manufacturer, or independent innovator or developer?
- What is your method of debudding?
- If debudding by machine, please list brand, manufacturer, or independent innovator or developer?
- What is your method of cleaning culinary bud?
- If cleaning culinary bud by machine, please list brand, manufacturer, or independent innovator or developer?
- What material do you use for storing bud?
- In what environment is your bud stored?

UNITED STATES LAVENDER GROWERS ASSOCIATION

Harvest Production – Month / Week Bloom Report

Each month indicates the bloom week by color, starting light (1st week) to dark (last week) of month.



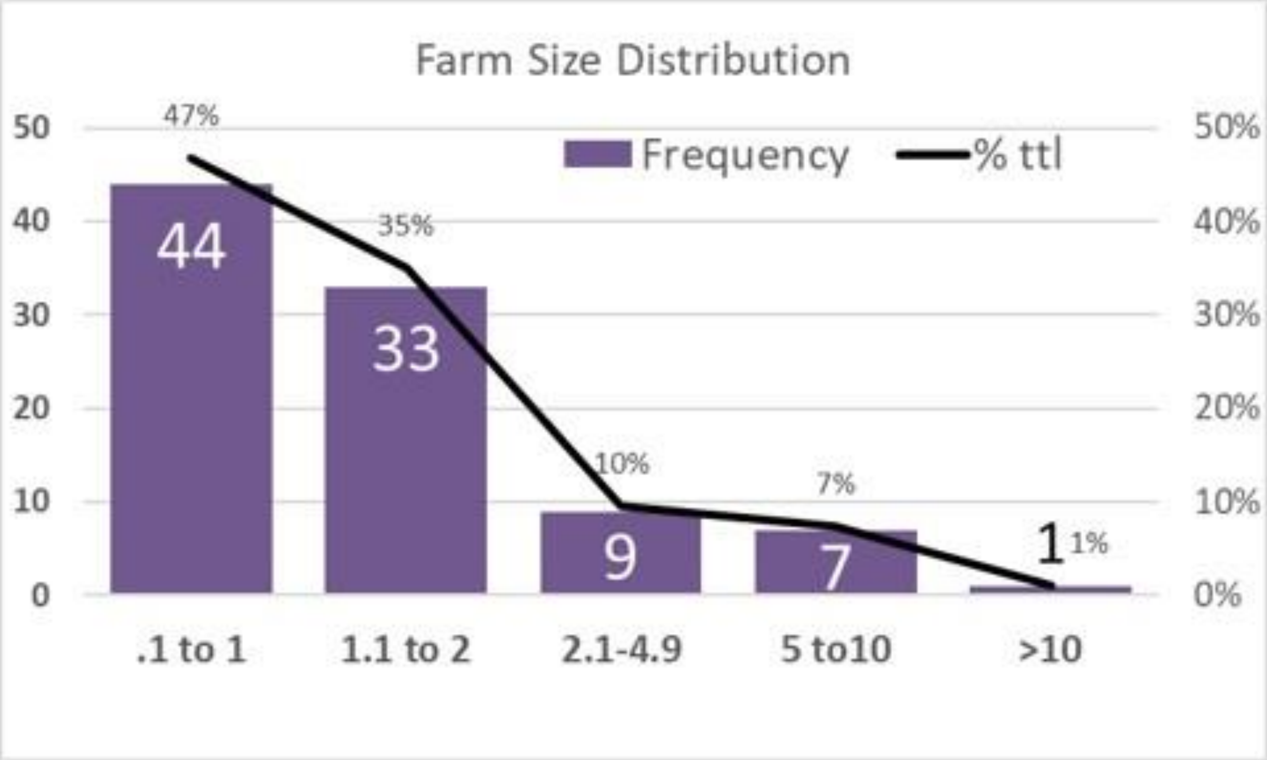


Key insights: The 4th week of May and the 3rd week of June are the most frequent bloom start months for each month respectively. That said, respondents indicated that blooming for Angustifolias can begin as early as the first week of April, or as late as the last week of July for some states/regions.

Key insights: For x Intermedia varieties the 4th week of June and the 1st week of July are the most frequent bloom start months for each month respectively. Respondents also indicated that blooming for x Intermedias began as early as the first week of March, or as late as the 2nd week of August for some states/regions.

(Reported Engaged in Harvest N=113 Response Rate 92%)

Harvest Production – Average Acreage Report



- 92% of all respondents operated 4.9 acres or less.

Key Insights:

Just over 158 acres reported planted

Respondent farm size nearly evenly split

2024:
- 62% >1 acre (n=50)
- 38% <1 acre (n=30)

2023:
- 55% >1 acre (n=76)
- 45% <1 acre (n=61)

8 farms reported 5 acres or more

1 acre mode (n=14; 17.3%)

Average reported acreage 2.0 acres

Largest reported acreage was 26 acres in 2023 and 2024

For farms reporting <1 acre (n=30):
- Half acre MODE (n=11) in 2024 (up from .25 in 2023)
- Average .47 acre

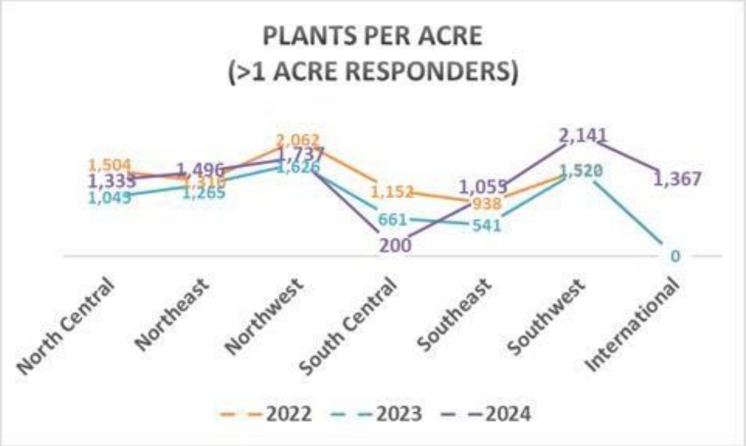
(Reported Acreage N=80 Response Rate 65%)

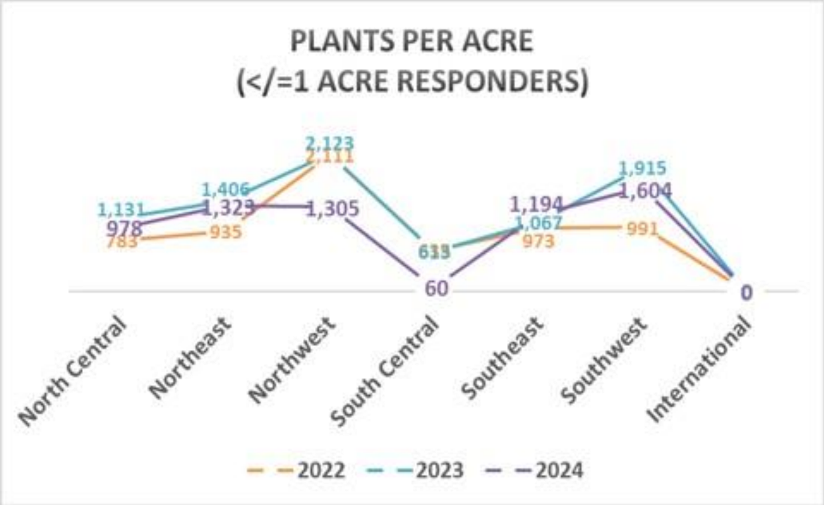
Harvest Production – All Average Report Plants P/Acre

All Acreage reporting Plants per Acre

	2024
North Central	1,128
Northeast	1,319
Northwest	1,597
South Central	130
Southeast	1,021
Southwest	**1,788**
International	1,367

Options graphics for BOTH <1 and>1 acre...





Harvest Production – Less, Greater, Equal to 1 Acre

Harvest Production – Greater than 1 Acre

For plots >1 acre, plants per acre plant density increased for all regions except South Central. The Southwest making the largest reported gain.

	2022	2023	2024
North Central	1,504	1,045	1,333
Northeast	1,316	1,265	1,496
Northwest	**2,062**	**1,626**	1,737
South Central	1,152	661	200
Southeast	938	541	1,055
Southwest	1,522	1,520	**2,141**
International	N/A	N/A	1,367

Harvest Production – Less than 1 Acre

For plots </=1 acre, the average reported plants per acre fell precipitously in all regions except the Southeast which reported a modest increase in plants per acre.

	2022	2023	2024
North Central	783	1,131	978
Northeast	935	1,406	1,323
Northwest	**2,111**	**2,123**	1,305
South Central	635	613	60
Southeast	973	1,067	1,194
Southwest	991	1,915	**1,604**
International	N/A	N/A	N/A

Harvest Production – Fresh Lavender & Bundles

Total Fresh Lavender Production n=23 18.6% Response Rate (up by 2+% from 16% in 2023)

2024	Ttl lbs	Avg. lbs	Ttl Bundles	Avg Bundles Reported	Avg. Bundle wt.	Mode Bundle wt.
Angustafolia	6,247	390.4	277,346	7,924	6.4 oz	4 oz.
x-Intermedia	15,054	940.9	397,926	9,474	10.5 oz.	4 oz.
Other	148	74	8,314	2,078	5 oz.	-
Total	21,449		683,586			

2023 'n=38	Ttl lbs	Avg. lbs	Ttl Bundles	Avg Bundles Reported	Avg. Bundle wt.	Mode Bundle wt.
Angustafolia	5,646	148.6	122,661	1,703		
x-intermedia	11,848	515.1	87,401	1,533		
Other	799	88.8	9,622	641		
Total	18,293		218,684			

YOY Change	Ttl lbs	Avg. lbs	Ttl Bundles	Avg Bundles Reported	Avg. Bundle wt.	Mode Bundle wt.
Angustafolia	+601	+241.8	+154,685	+6,221		
x-intermedia	+3,206	+425.8	+310,525	+7,941		
Other	-651	-14.8	-1,308	+1,437		
Total	+3,156					

Key Insights:

- xIntermedia was harvested at levels nearly 2.5X that of Angustifolia by weight.
- Angustifolia growers reported nearly 1.5X the bundle count of xIntermedia production.
- Average Angustifolia bundle weight was 6.4 oz., while xIntermedia average bundle weight was 10.5 oz.
- The most frequently reported bundle weight was 4 oz for BOTH varieties.
- Total reported pounds harvested increased by over 3,000 lbs, with 15 fewer respondents likely indicating membership effort toward improved data/harvest tracking habits.

(n=23 18.6% Response Rate (up by 2+% from 16% in 2023))

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(n=23 18.6% Response Rate (up by 2+% from 16% in 2023)

Harvest Production – Angustifolia For Culinary Use

Angustifolia Fresh Bundle – Culinary Use

54% of harvested Angustifolia is for culinary purposes, up slightly from 50% in 2023. the most frequently reported percentage allocated for culinary purposes was 10%.

Harvest Production – Distillation

Harvest for Distillation n=25 20% Response Rate (up from 10% in 2023 n=+2)

	Angustifolia	Grosso	x-Intermedia	Other	2024 Grand Total	2023 Grand Total
Total Reported Pounds (lbs.)	4,941.0	5,279.2	8,846.3	N/A	19,066.5	22,158
Average Pounds (lbs.)	823.5	377.1	631.9	N/A	N/A	N/A

Key Insight: x-Intermedia leads reported poundage used for distillation purposes (46.3%). While distillation respondents remain somewhat small-in-number (n=25), respondents increased by n=2, representing a 10% increase year over year. Note the above data: Grosso numbers are not included in the numbers shown for x-Intermedia, each show numbers that stand on their own.

(n=25 20% Response Rate (up from 10% in 2023 n=+2)

Harvest Production – Essential Oil

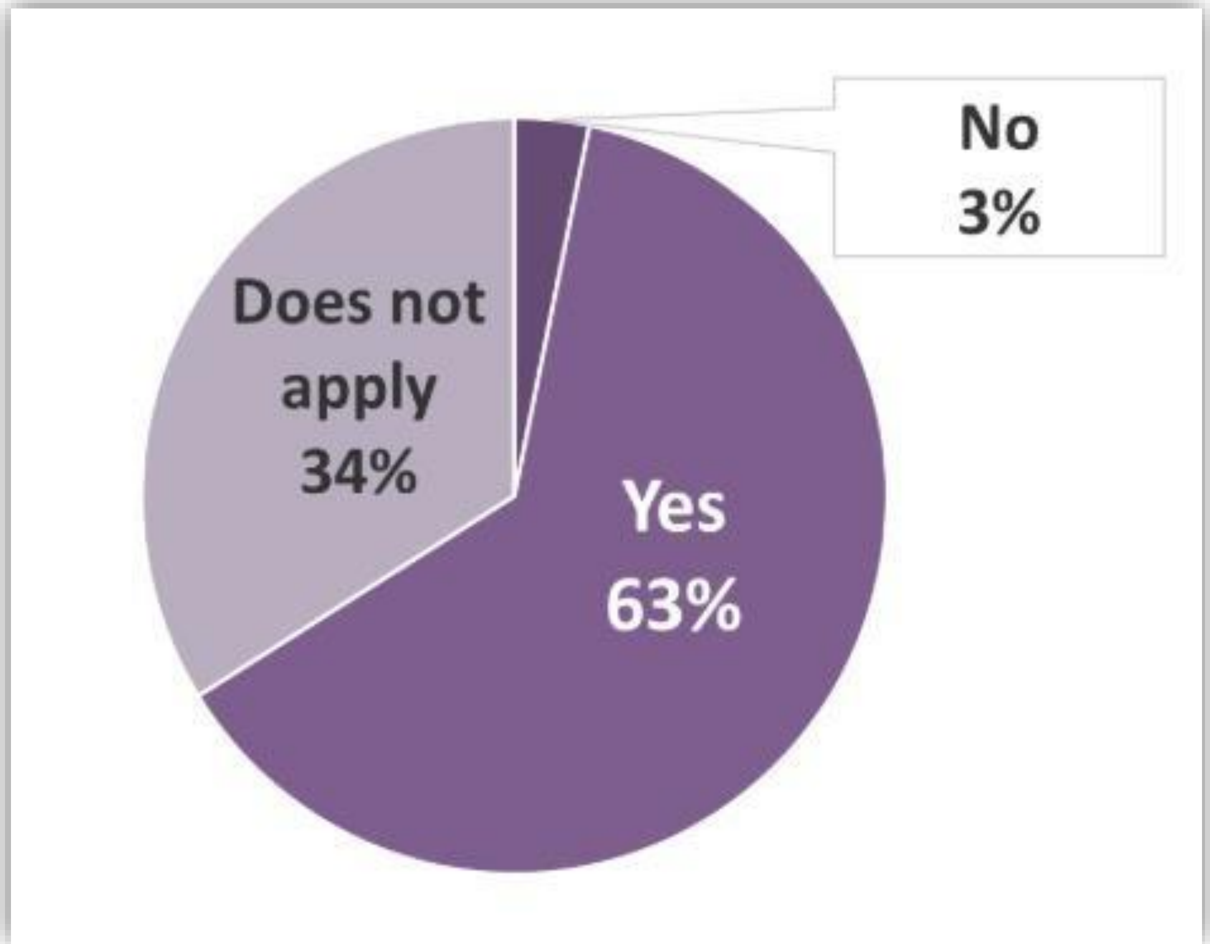
Harvest for Essential Oil

2024	Grosso	Angustifolia	X-Intermedia	2024 Grand Total
Total Reported Ounces (Oz)	1,698.9	925.2	6,218.9	8,843.
Average Ounces (Oz)	99.9	102.8	345.5	N/A

Key Insight: 20% of survey respondents (n=+3) reported essential oil production resulting in 138 gallons essential oil. In 2024, 70% of essential oil reported came from x-intermedia, with 19% coming from Grosso (down from 47%). An important element of essential oil is its grade, a data metric not yet collected as an association.

(Harvest for Essential Oil (n=25))

Harvest Production – Hydrosol

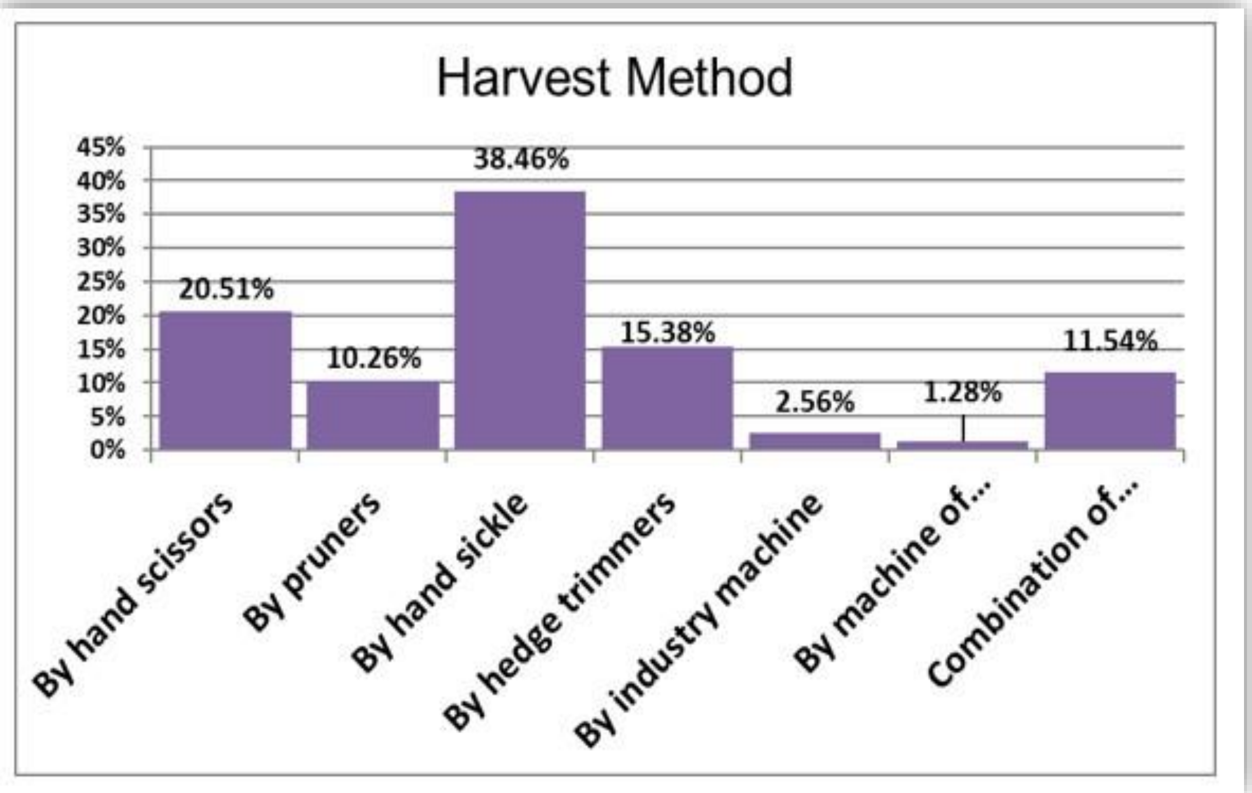


Key Insights:

- 63% of survey respondents collect their hydrosol from the distillation process.
- A total of 2,132 gallons of hydrosol was reported in 2024, down from 2,480 gallons in 2023.
- Only *26 of the 39 respondents who report they do collect their hydrosol* shared their hydrosol data, suggesting that perhaps less emphasis is placed on the value of hydrosol produced, or there is opportunity for improved data tracking for hydrosol production in the future.

(Hydrosol (n=62, 50% response rate))

Harvest Production – Method of Harvest



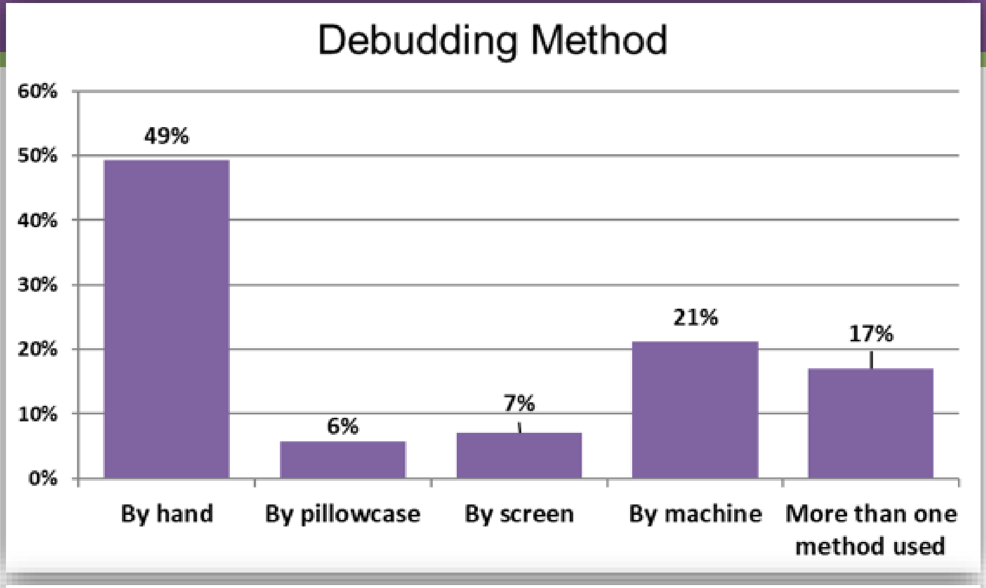
Key Insights:

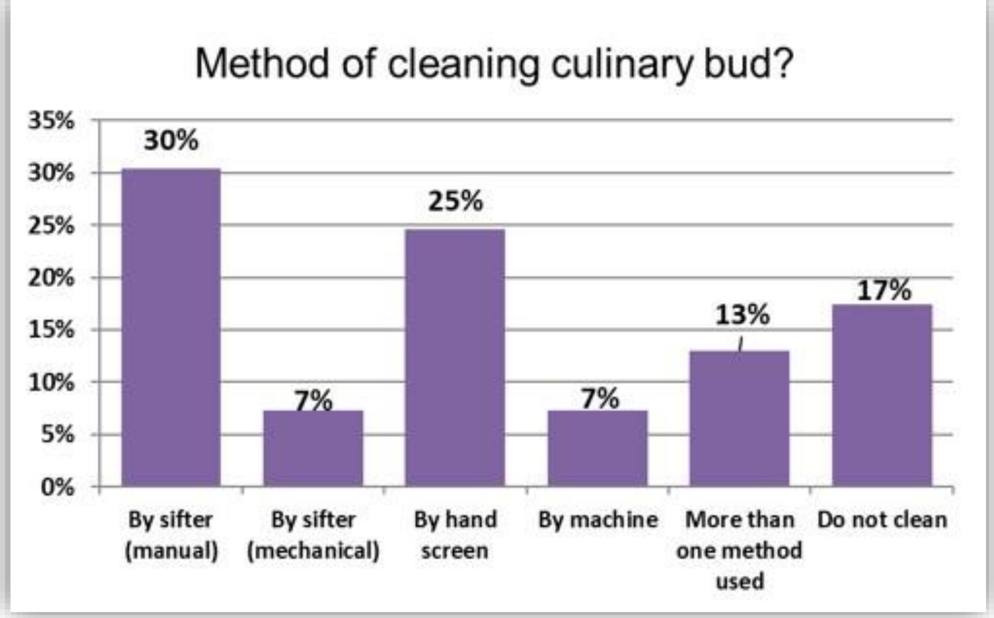
- Over 84% of all harvesting is still done by some manual means. Electric scissors or electric hand clippers (Stihl/Ryobi) were frequent alternate responses. Respondents also comment that harvest method can be dependent on the cultivar (ie. Angustifolia – power trimmer vs. x-Intermedia - manual/scissors).
- Nearly 3% choose some form of commercially available mechanized harvesting equipment, while a smaller percentage have opted for a home-based solution or commissioned custom designed form of equipment.
- Automated harvest equipment includes:
  - Starr Lavender Harvester (USA)
  - Bizon MKL2K (Bulgarian made/USA sourced)
  - Harvest Concepts (New Zealand)
  - Non-brand specific Made in China harvesters

Harvest Production – Debudding

Key Insights:

- Majority of respondents are debudding by hand, or some non-mechanized means.
- Culinary bud is being cleaned by the manual means of a sifter (30%) or by hand using a screen (25%).
- 7% utilize a machine or a mechanical sifter, while 17% do not clean culinary bud.

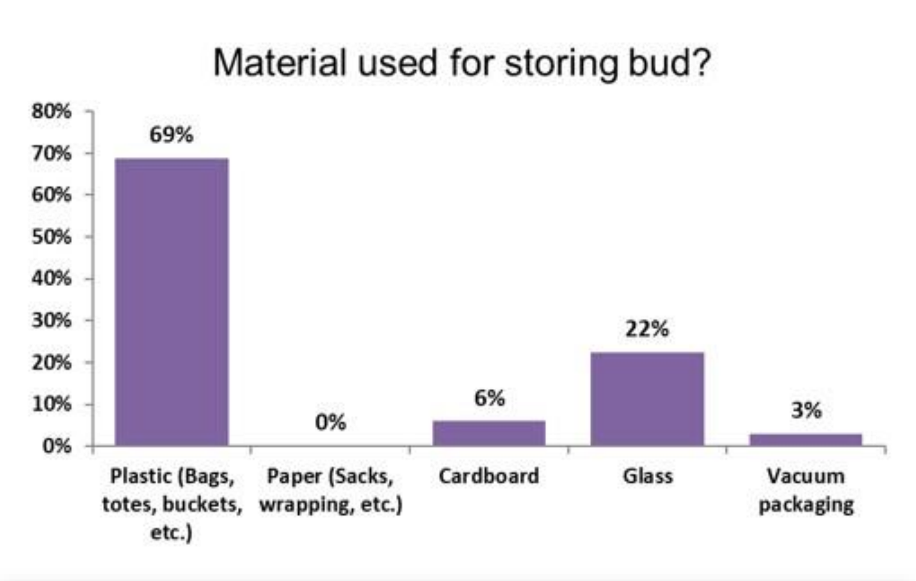


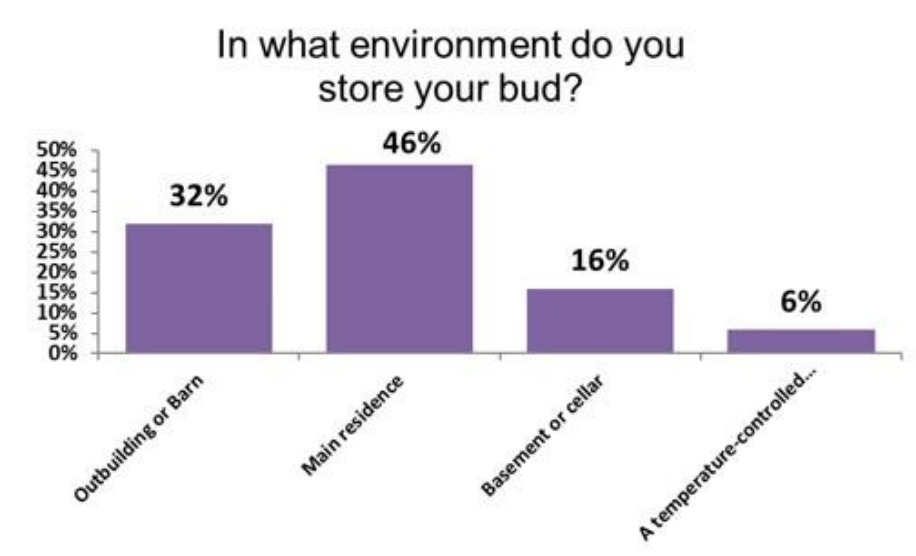


Harvest Production – Bud Storage

Key Insights:

- A large majority of respondents utilize plastic for storing processed bud (69%)
- Other materials such as glass (22%) and cardboard (6%) are also utilized to a lesser extent.
- Once bud is processed and packed, 62% is stored in the respondent's main residence or basement.
- A reported 32% of processed bud remains in an outbuilding or barn.
- Only 6% of bud is stored in purposeful temperature-controlled storage.





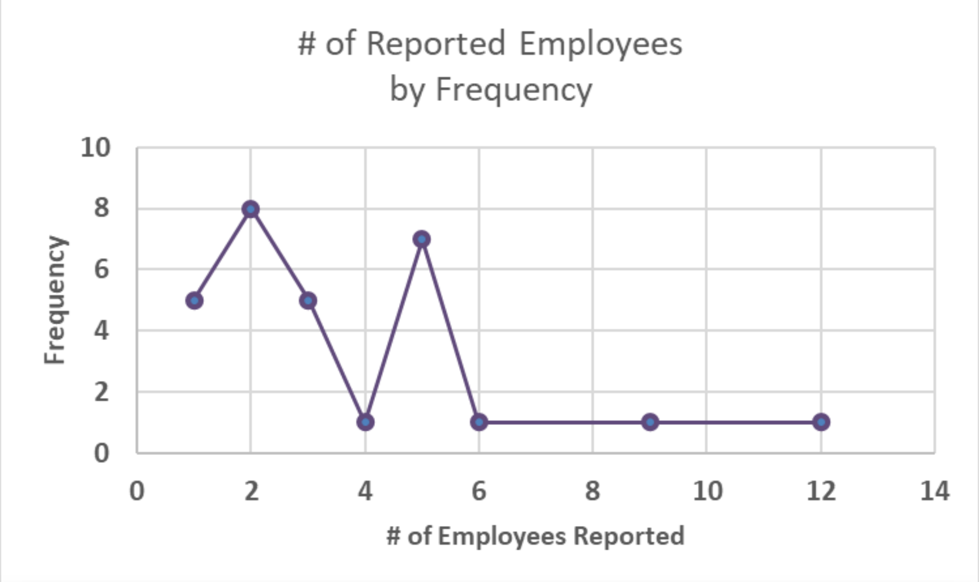
Farm Operations Survey Questions:

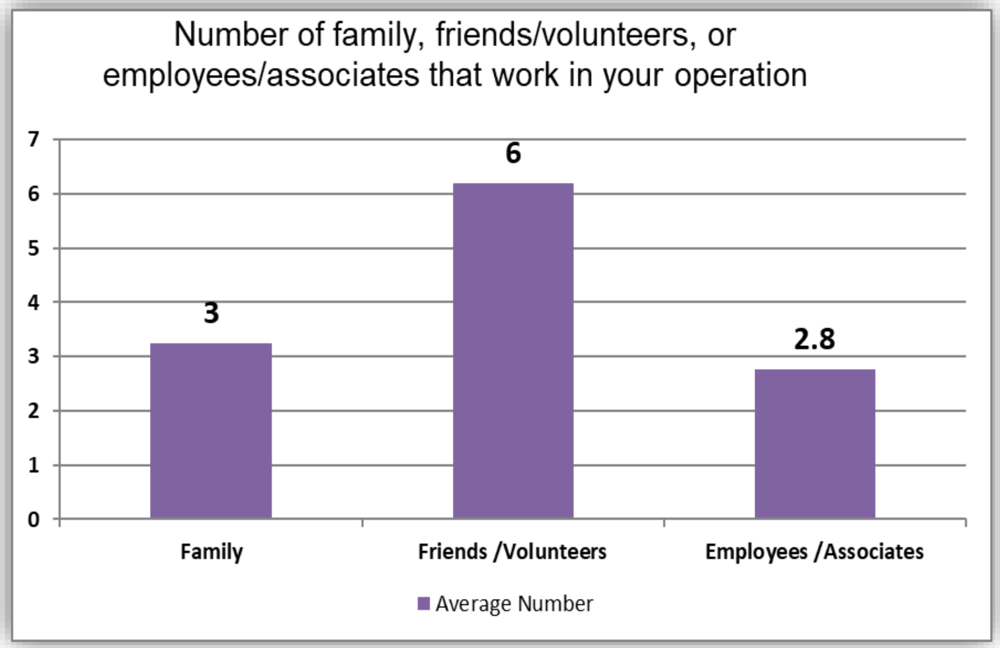
- Number of family, friends/volunteers, or employees/associates that work I your operation?
- Does your farm/operation/business engage in agritourism?
- Does your farm/operation/business engage in agritainment?
- Does agritourism/agritainment hosting require special county zoning/permissions in your area?
- Do you carry insurance coverage to support your events?
- How many visitors came to your farm/business this operation year?
- Was actual visitor Ticketing/Tallying used to track and generate the value entered above?
- Do you currently comply with ADA (American with Disabilities Act) requirements?
- Does meeting ADA requirements present difficulties, or limit ability to sell product at your farm?

Farm Operations – Workforce

Key Insights

- Maximum number of employed associates for any respondent was 12 (down from 30 in 2023).
- Most frequently reported number of employed associates was 2.
- 44% of responders indicated FRIENDS & VOLUNTEERS supported their workforce needs (n=36), up from 21% in 2023. One enterprise reported utilizing the high of 80 friends/volunteers.
- The average number of friends and volunteers reported working in the operation was 6, the average number of family members reported was 3, and the average the average employee count was approximately 3.
- In total, nearly 575 people are reported to be supporting the 81 farm/enterprises engaged in lavender operations.





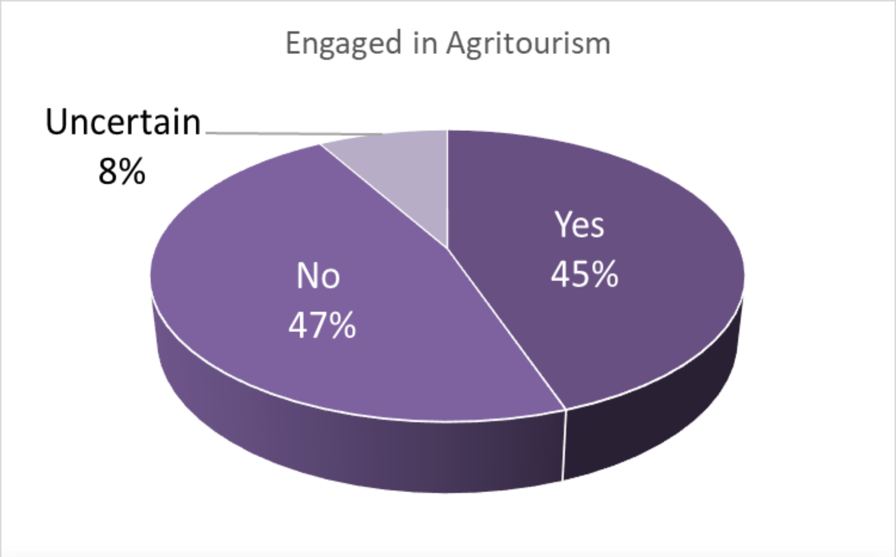
(Workforce (n=81, 66% response rate))

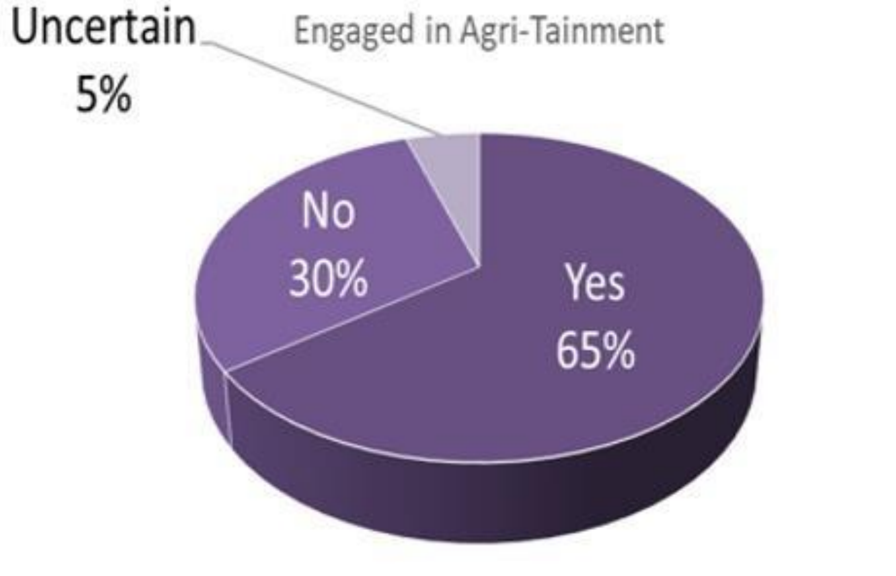
Farm Operations – Agritourism / Agritainment

Key Insights:

- In 2023, 51 operations (21%) reported being engaged in agritourism. In 2024, 37 operations reported being engaged, 45% of all those responding to the question, and 30% of all survey participants.
- A somewhat new term was added to the survey this year, "Agri-tainment". As defined in the survey, 26 operations currently engage in agri-tainment.

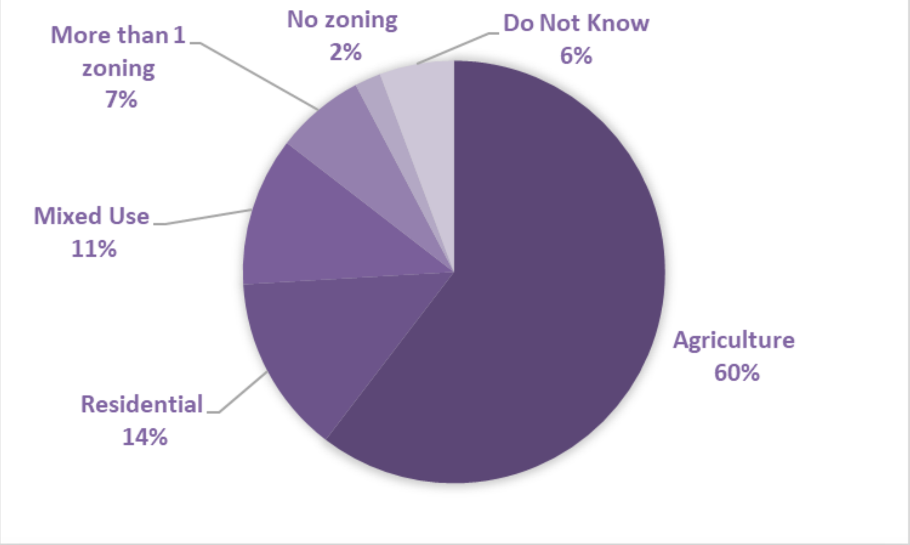
AGRITOURISM	AGRITAINENT
A type of tourism where people visit farms or rural areas to experience agricultural life and activities. This can include things like farm tours, picking fruits and vegetables, wine tasting, and participating in farm-related tasks.	A blend of agriculture and entertainment, offering visitors fun and educational experiences on farms. This can include activities like corn mazes, hayrides, petting zoos, farm-themed festivals, and interactive demonstrations.





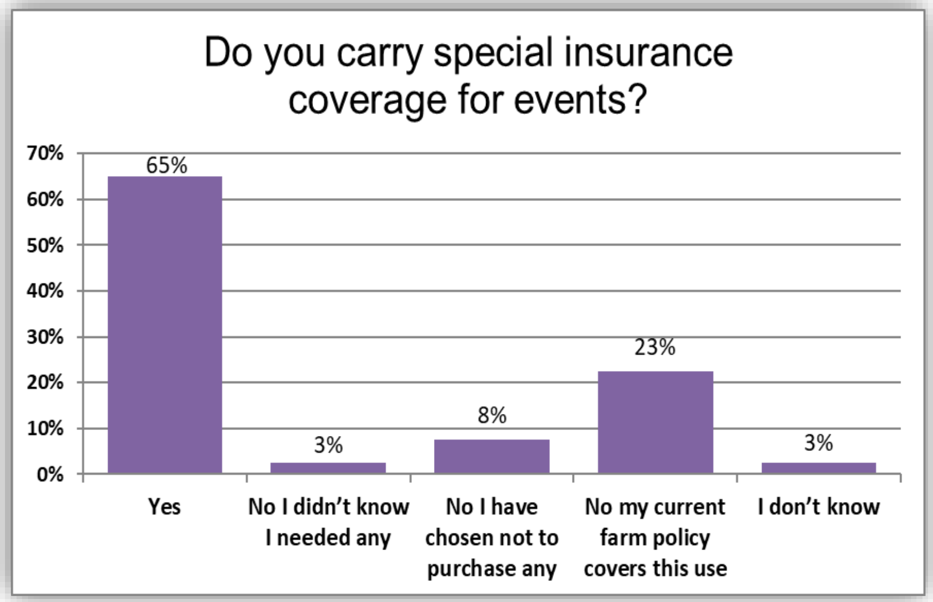
(Agritourism/ n=37 Agritainment n=26)

Farm Operations – Zoning & Insurance



Key Insights:

- A majority of responding operations are zoned agricultural (60%), however as noted in numerous free responses, zoning by region, state and even municipality can be quite complex and can vary widely.
- Of those engaged in agritourism, a majority (73%) report NOT being required to have special zoning, while 20% are required to and 8% are not sure about their zoning requirements. (n=40)
- A majority of those holding special events held at their location do have special insurance policy coverage (65%) or are covered by their current farm policy (23%) to manage operational risk.
- 11% of respondents were either unaware of the need for special insurance coverage (3%) or are knowingly assuming the operational risk without special coverage (8%).
- 62% of respondents involved in agritourism are currently zoned agricultural. 24% are zoned mixed use or dual use (n=9), while 8% are zoned residential, and no survey respondents reported being zoned exclusively commercial.



(Agritourism n=40; Dual Use/Mixed Use n=9; 8% zoned residential; and no commercially zoned were reported)

Farm Operations – Visitors

Key Insights:

- A total of 121,773 visitors visited the 31 reporting farms, up from 86,267 in 2023, a 41% increase.
- The AVERAGE visitor count was 3,928, a 3-fold increase over that reported in 2023 (1,327). N= % note here
- 55% of respondents reported 1000 or more visitors to their operation, and 3 farms reported 10,000 or more visitors, an increase of 2 farms over 2023 reporting.

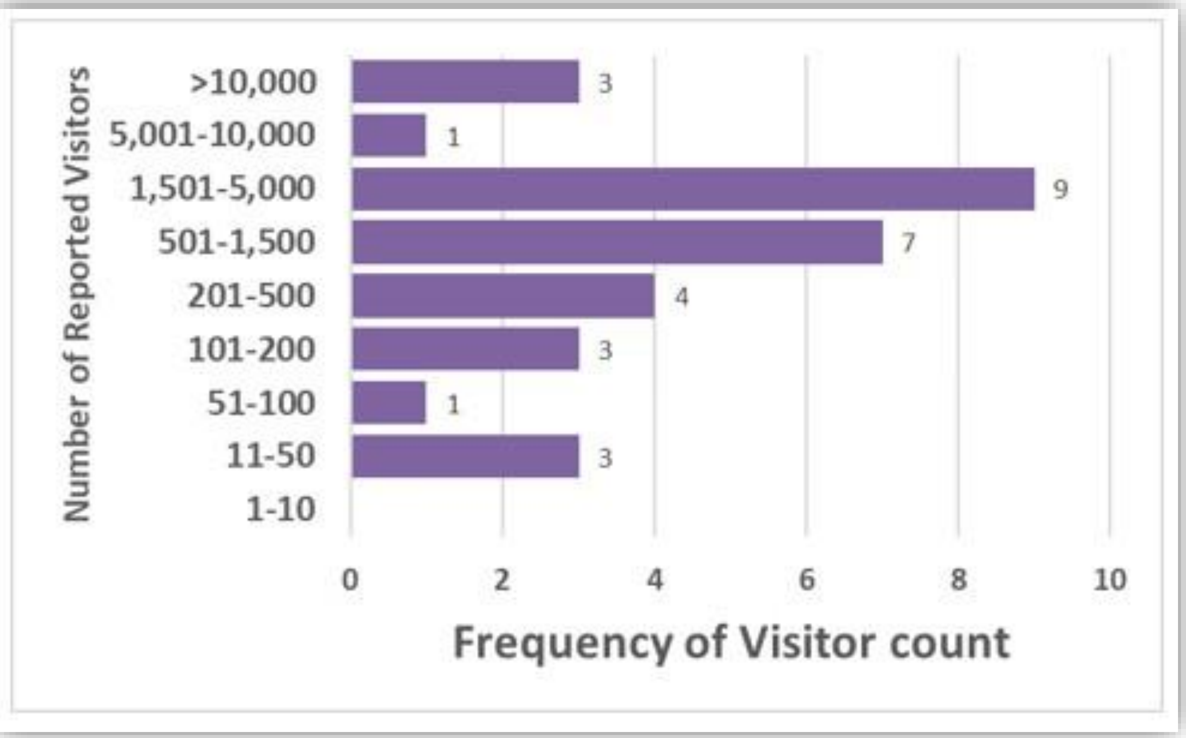


Photo credit: KEVIN MAZUR/TAS24/GETTY IMAGES FOR TAS RIGHTS MANAGEMENT

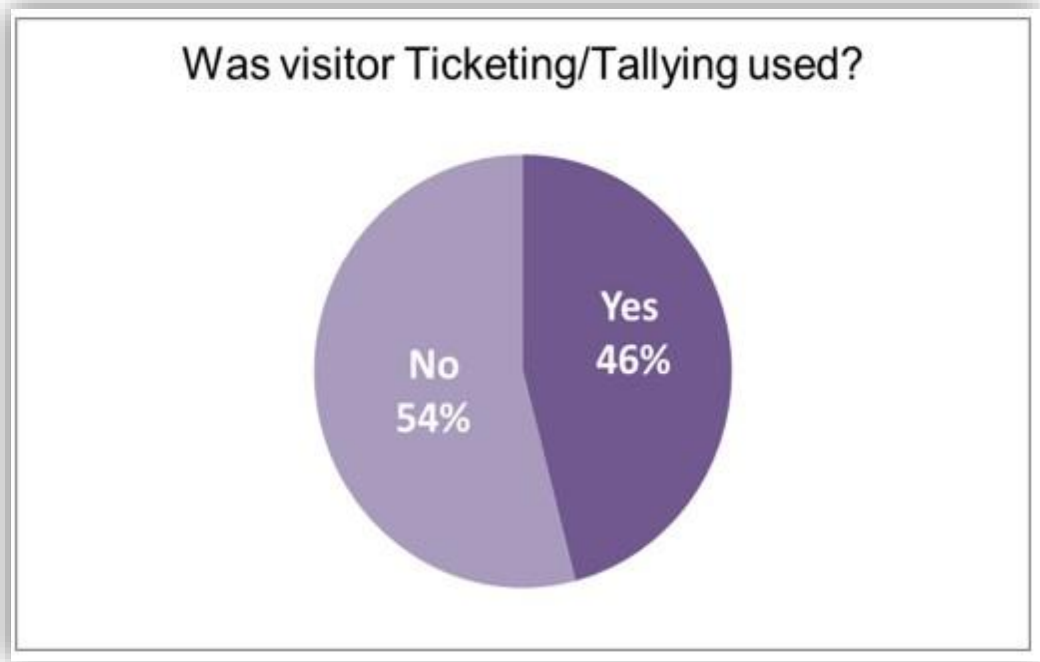
In total the respondent visitor count was 2 times more people than what attended the largest music concert! Yep, Taylor Swift's Eras concert at Lucas Oil Stadium, Indianapolis Indiana, November 1, 2024 (69,000!).

(Visitors (n=31, 25% response rate))

Farm Operations – Tickets/Tallying

Key Insights:

- The Southwest reported the highest visitor count with over 61,000 visitors to the 18 reporting farms/operations in that region. This is 10,000 more visitors than the highest region reporting in 2023.
- Arizona and California contributed most significantly to the Southwest region's visitor count.
- The Northeast reported the 2nd highest visit count with just over 42,000 visitors with Virginia and Indiana contributing substantially to the total.
- The use of visitor count "systems" or tallying to track this metric remains inconsistently utilized, which may suggest an opportunity to identify best practices and improve accuracy going forward.
- Enables farms to include legal disclaimers, ADA, and other information to inform visitors prior to visit, and protect farm owners during visit.

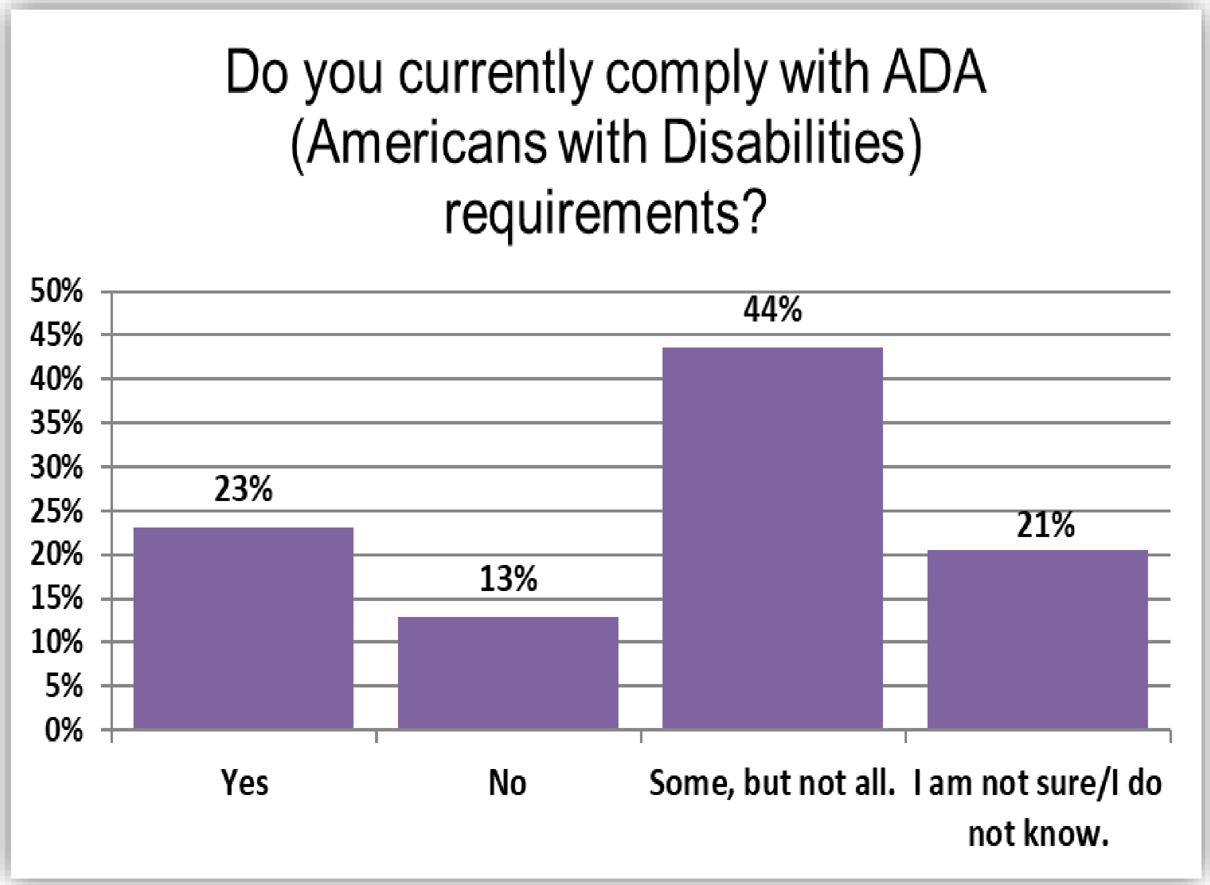


(Ticketing/Tallying (n=18, 25% response rate))

Marketing / Sales – Americans With Disabilities Act (ADA)

Key Insights:

- Many respondents either fully comply with ADA requirements (22%) or comply with some ADA requirements (44%). Approximately 1/3 of respondents either do not currently comply, or uncertain of their level of compliance.
- Approximately 60% of respondents report that ADA compliance (or lack thereof) has no impact on their ability to conduct business, while approximately 13% report their business being impacted in some form and 28% report being insufficiently informed of ADA compliance to respond accurately.



(ADA Compliance (n=39, 32% response rate))

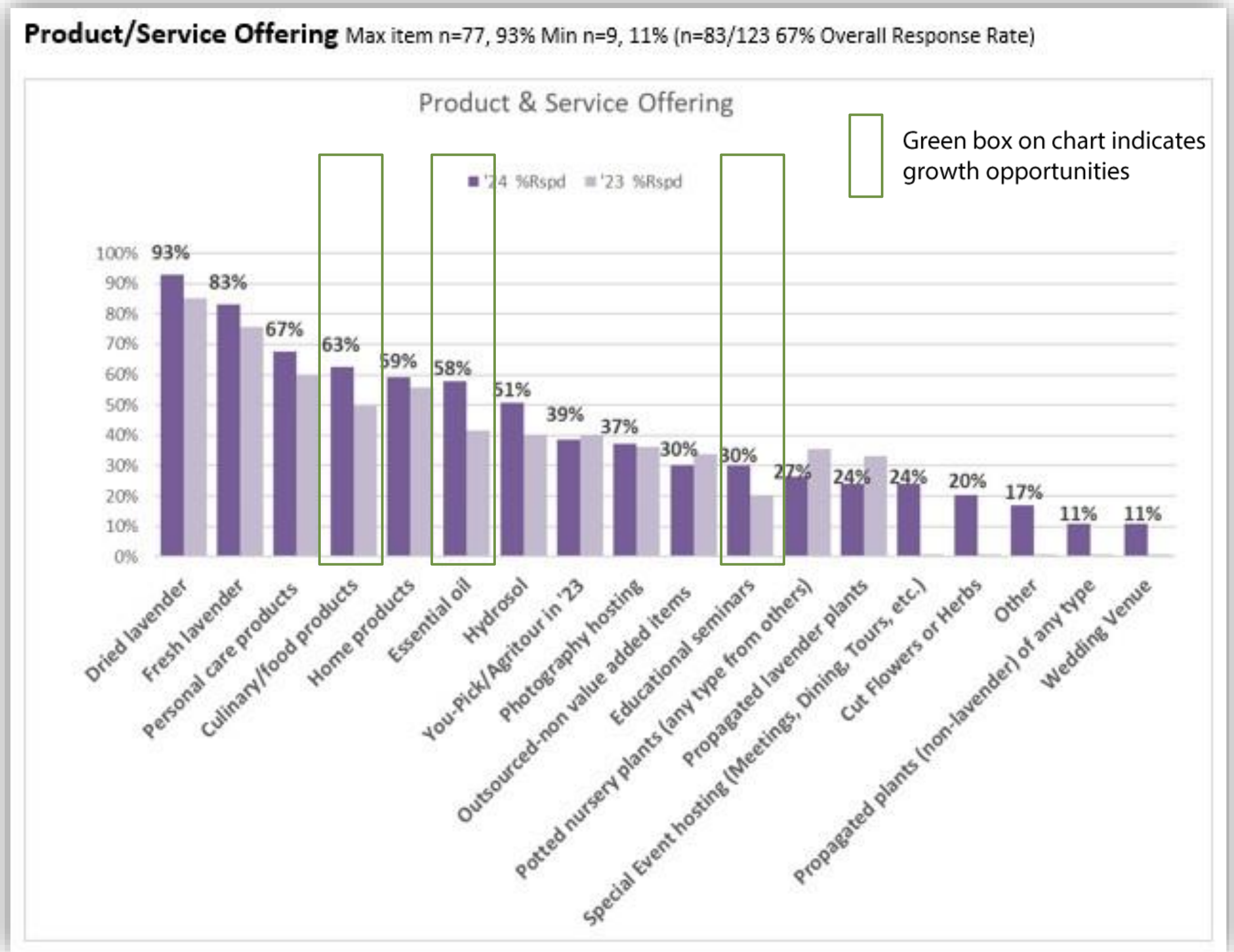
Marketing / Sales Survey Questions:

- What products and services do you offer?
- Where do you sell your products
- How do you attract visitors?
- What are the sales, and or, distribution outlets for the products that you sell?

Marketing / Sales – Products & Services

Key Insights:

- In 2023, several products/services including educational seminars, special event hosting, photography and agritourism were highlighted as possible opportunity spaces for product growth due to participation near or below 20%.
- In 2024, many of these reported products/service offerings appear to be making gains, while new emergent areas gain in popularity (cut flowers; non-lavender propagation, wedding venues).



(Product/Service Offering Max item n=77, 93% Min n=9, 11% (n=83/123 67% Overall Response Rate))

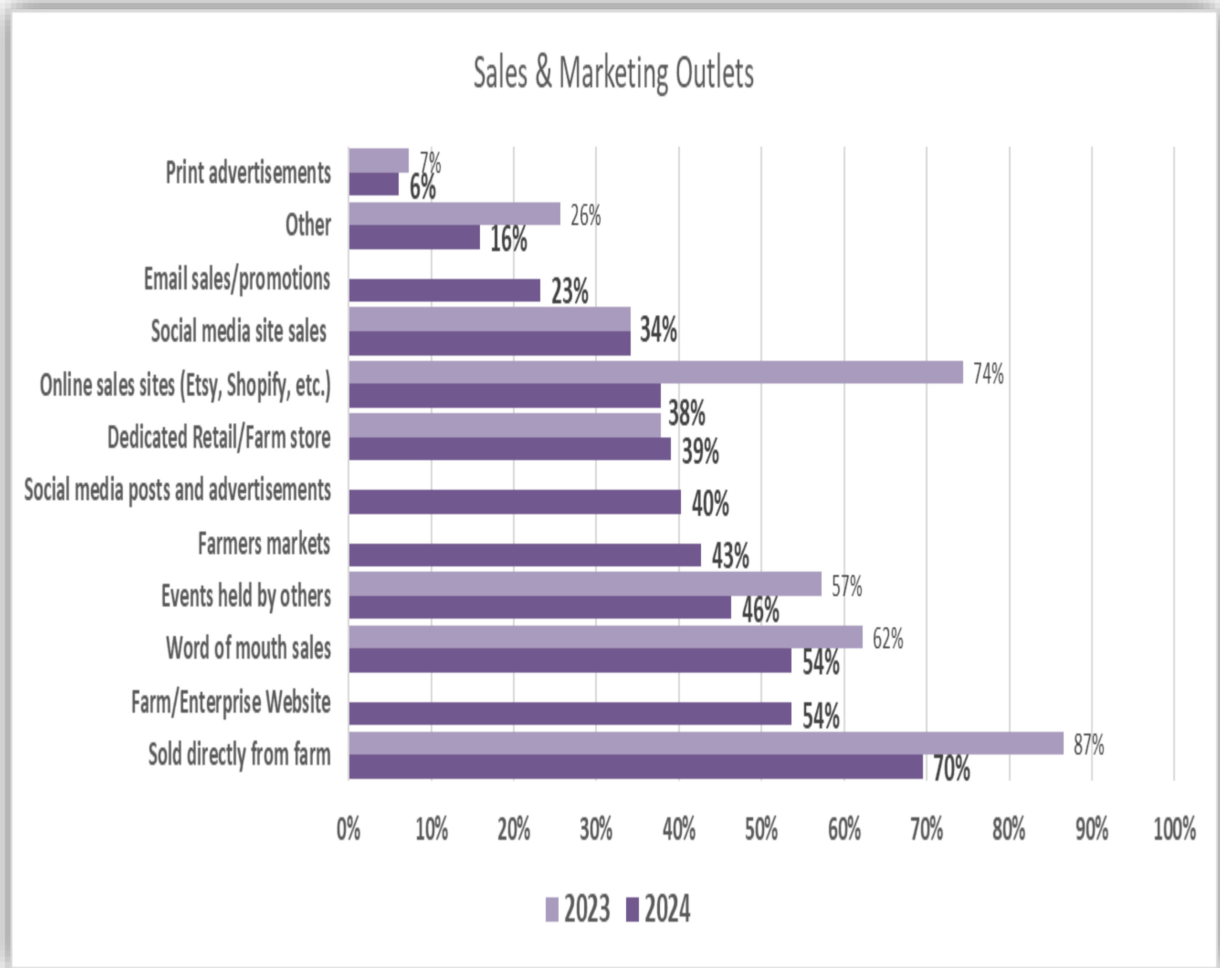
Marketing / Sales – Where do you Sell & Attract Visitors

Key Insights:

- While a reporting of direct from farm sales and the use of online sales sites is down significantly from 2023 as a percentage of responses, the reporting of farm/enterprise website use, social media posts/ads, and email promotions emerge as new areas of reported sales and marketing outlets.

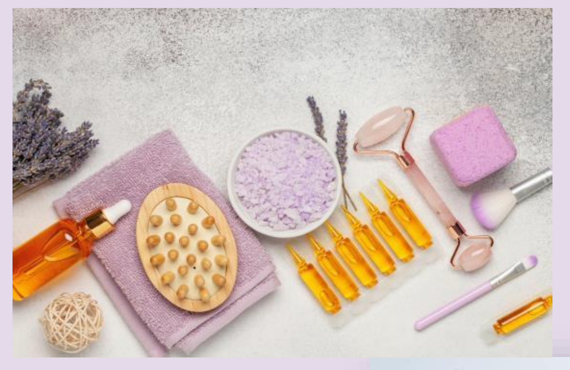
- Dedicated retail/farm store and social media site sales outlet reporting remain flat year over year (38%, 34%). Farmers market data began being collected in 2024, with over 40% reporting participation (43%).

- Print ads continue to drop as a percentage of all responses and remain the least reported sales/marketing outlet as in 2023.



(Sales and Marketing (n=82, 66% response rate))

Revenues/Profitability Survey Questions



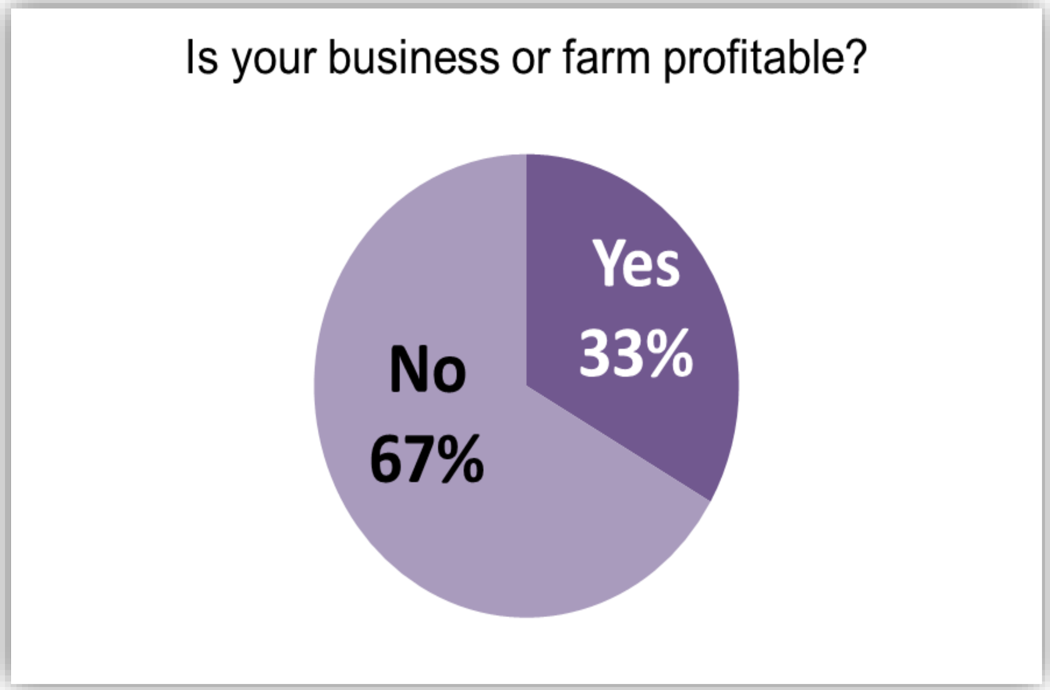
- What is your actual/estimated Gross Revenue in U.S. Dollars?
- Please share more detailed financial data regarding your annual revenues in U.S. dollars to assist us in better understanding your operation and its impact on the US lavender industry?
- Is your business or farm profitable?
- During which 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?

Revenues/Profitability – Revenue Flow

Key Insights:

Over $1,731,000 MM in total sales revenue was reported by 38 survey participants for an average reported revenue of approx. $52,457 per respondent, essentially flat to reporting in 2023 ($52,700).

- Of reported revenues, respondents also reported 37% were attributed to Value-Added product sales for an average of ~$45K (n=14).
- 22% were attributed to Direct to Customer sales for an average of ~$24K (n=16).
- 15% were attributed to Wholesale sales for an average of ~$30K (n=10).
- 10% were attributed to Event/Rental revenues for an average of ~$4K (n=4), and Export Sales represented less than .5% of reported sales (n=2).

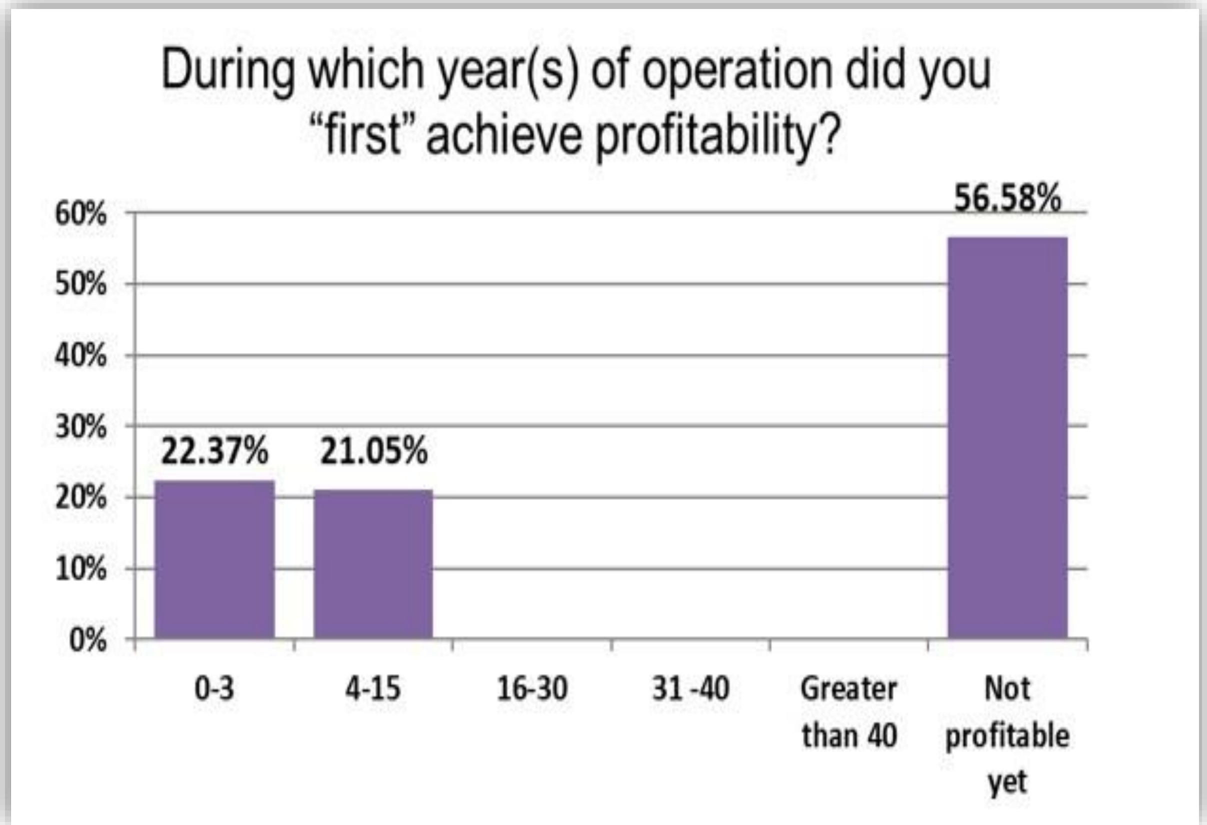


(Profitability Reporting (n=78 , 63% response rate))

Revenues/Profitability – First year of Profitability

Key Insights:

- The majority of those responding to the survey are not yet profitable (67%).
- Despite challenging economic headwinds for small business start-ups, over 20% of respondents became profitable in 3 years or less.



(Profitability Reporting (n=78 , 63% response rate))

Free Response Write In Question

"Some report being in pre-production phase, and/or juggling full-time employment and starting up their lavender enterprise."

"One respondent shared that while profitability is one consideration for business, other financial metrics were in their calculus, along with choosing a specific lifestyle."

"Respondents report having to make careful decisions of not spreading themselves too thin as they scale their business, and find which markets, events, and products are most effective for them."

"Weeds, pests, soil and weather posed many challenges this year for growers. An extended wet spring in the NW, early subzero temps and prolonged late summer drought in the MW, chronic weeds and repeat flooding in the NE, Asian beetles, soil fertility in Northcentral and fire ants in the SE".

In 2024 growers faced challenges, unusual weather events, some economic losses, market opportunities & discovered emergent trends

(Free Response Write In (n= 29))

2024 USLGA Harvest Survey

- Respondents: One hundred and twenty-three respondents (123) growers responded to the survey, representing 113 members, and 9 non-members. Based on 573 current USLGA members, the 123 survey respondents yielded a “good” response rate of 19.7%, with 97.2% of this percent representing current members. Generally, a “good” responses falls 5%-30%, excellent is 50%+.
- Age Groups: More than 87% of respondents are 45 years and older. Age 35-44 respondents grew their representation by 5% from 2023,while no respondents age 18-34 participated this year.
- Demographics: The Northeast region had the most survey participants, however, the states that reported the most lavender farms according to the survey are California, Washington, Michigan, New York, and Oregon.
- Total Harvest: Survey respondents reported over twenty tons (20.3 tons) of fresh and for distillation lavender was being harvested.
- Plants in Production: Over one hundred and ninety-eight thousand (198,000+) plants in production.
- Cultivars: In 2024, xIntermedia was harvested in pounds at levels 2.5X that of Angustifolia, yet Angustifolia growers reported nearly 1.5X the bundle count of xIntermedia production. Average bundle weight differs for both cultivars, however, the most frequently reported bundle weight for both varieties was four (4 oz) ounces.
- Employees: Farm operations are most commonly, supported by family, friends and volunteers. Our survey showed 44% of respondents indicated that Friends and Volunteers are supporting their workforce needs (n=36), up from 21% in 2023. In total, nearly 575 people are reported to be supporting the 81 reporting farm enterprises engaged in lavender operations.
- Distillation: 2024 survey reported xIntermedia led reported poundage used for distillation purposes (46.3%). While distillation respondents remain somewhat small-in-number (n=25), respondents increased by n=2, representing a 10% increase from 2023.
- Essential Oil: In 2024, xIntermedia was used for seventy (70%) percent of essential oil produced, with nineteen (19%) percent derived from Grosso (down from 47% in 2023). Our survey respondents reported one hundred and eighty-three (138) gallons of lavender essential oil, nearly 9000 ounces produced in 2024.
- Hydrosol: In 2024, 63% of survey respondents collect their hydrosol from the distillation process producing two thousand one hundred and thirty-two thousand gallons (2132+) of hydrosol this year, down from 2,480 gallons in 2023. Only 26 of the 39 respondents who report that they do collect their hydrosol shared their hydrosol data.
- Culinary: The 2024 survey shows fifty-four (54%) percent of harvested fresh Angustifolia is used for culinary purposes, up slightly from fifty (50%) percent in 2023. The most frequently reported percentage allocated for culinary purposes was ten (10%) percent.
- Agritourism: The 2024 survey shows the Northeast region led in agritourism, and the number of visitors. Overall, survey respondents welcomed over one hundred and twenty-one thousand (121,000) visitors in2024. The 31 reporting farms averaged 3903 visitors.
- Products: In 2024, the reported most popular products offerings were dried bud (93%), Fresh (83%), Personal care (67%), Culinary (63%), Home products (59%), Essential Oil (58%), Hydrosol (51%), with opportunities for growth in: Agritourism (39%), Educational Seminars and Workshops (30%), Event Hosting (24%), and Cut Flowers & Herbs (17%).
- Marketing/Sales: For 2024, respondents reported the most successful marketing/sales tactics came from Direct from Farm Sales (70%), Online (54%), Word of Mouth (54%), Festivals (46%), Farmers Markets (43%), Dedicated Retail Store (39%), Social Media (34%), Email Promotions (23%), Other (16%), and Print Ads (6%). Sales from farm website, social media, and emails are rising, possibly due to cost-effective selling ratios.
- Revenues: In 2024, $1.731 million in total sales were reported by 38 survey participants for an average reported revenue of approximately $52,457 per respondent.

2024 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 nears 600 and continues to grow rapidly. For more information on lavender or membership go to www.uslavender.org or email info@uslavender.org. For more information on this or any other USLGA sponsored survey email: education@uslavender.org

2024 USLGA Harvest Survey Presentation

Education & Research Committee