

US Grass and Legume Seed Data: Oregon Update to 2012

Overview:

- The downturn in the grass and legume seed industry, which coincided with the world economic crisis (late 2008), resulted in acres reaching a low of 373,000 in 2011.
- Since 2011, acres have been on the increase, but still 68,000 below the 10 year average.
- Overall production of grass and legume seed in Oregon remains below the 10 year average. (2012 = 667 million lbs., all species, 10 year average, 2002 to 2011 = 738 million lbs.).
- Prices offered to growers, for most crops, were quoted above 10 year average prices.
- Legume seed acres only accounts for 9% of grass/legume seed acres in Oregon.
- The grass and legume seed industry in Oregon continues to be a major economic factor in Oregon, providing over \$400 million of value into the economy.
- (note: Dr. Bill Young's summary at bottom of article)



Oregon Grass and Legume Seed Crops Preliminary Estimates (2002 - 2012)												
	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area	Area
	Harvested	Harvested	Harvested	Harvested	Harvested	Harvested	Harvested	Harvested	Harvested	Harvested	Harvested	Harvested
	(acres)	(acres)	(acres)	(acres)	(acres)	(acres)	(acres)	(acres)	(acres)	(acres)	(acres)	(acres)
Grasses	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	10 yr avg (2002-11)
Annual ryegrass	119,470	117,250	124,890	125,400	131,800	128,100	123,800	118,520	112,000	122,710	127,040	122,394
Perennial ryegrass	151,200	167,130	177,630	192,950	170,570	161,120	122,860	107,420	91,570	93,760	105,160	143,621
Tall fescue	162,750	140,990	142,050	145,330	158,170	161,490	174,580	157,570	117,080	106,520	127,250	146,653
Kentucky bluegrass	19,040	18,340	17,510	21,600	21,240	19,760	20,500	17,970	13,350	10,630	10,570	17,994
Rough bluegrass	3,770	2,150	2,590	2,420	2,260	2,300	2,200	1,910	2,050	2,200	2,060	2,385
Orchardgrass	19,110	18,920	18,110	17,370	15,970	15,530	17,010	17,050	15,710	15,100	13,770	16,988
Chewings fescue	8,170	4,920	5,380	7,090	8,250	9,310	10,180	10,155	7,660	7,080	7,570	7,820
Red fescue	9,440	7,390	6,650	6,790	7,190	7,480	7,400	8,500	8,490	8,460	7,430	7,779
Hard fescue	3,070	1,375	1,280	1,300	1,430	2,162	2,670	2,770	3,205	2,535	2,440	2,180
Colonial bentgrass	3,560	3,620	3,730	4,050	3,510	3,160	2,760	2,250	2,200	2,250	2,350	3,109
Creeping bentgrass	4,830	4,580	4,140	4,460	5,070	5,380	5,700	4,430	2,350	2,050	2,360	4,299
Wheatgrass, ALL						140						14
Total Grasses	504,410	486,665	503,960	528,760	525,460	515,792	489,660	448,545	375,655	373,295	408,000	475,220
Legumes												
Alfalfa	4,650	4,500	5,680	4,870	3,880	3,240	2,950	2,300	2,420	1,450	2,370	3,594
Red clover	14,280	11,860	10,950	13,790	15,610	14,520	15,650	15,810	19,930	19,810	17,350	15,221
Crimson clover	3,630	6,760	8,440	6,100	4,300	3,580	5,700	8,780	5,960	7,650	8,690	6,090
Common vetch	540	550	310	190	240	20	20	320	650	1070	660	391
Hairy vetch	840	20	550	250	320	430	450	590	790	1340	1170	558
White clover/Ladino	3,100	4,190	4,850	6,350	8,400	9,130	10,170	12,640	12,410	11,470	10,450	8,271
Arrowleaf clover	302	595	652	1020	1010	885	735	640	590	253	235	668
Total Legumes	27,342	28,475	31,432	32,570	33,760	31,805	35,655	41,080	42,750	43,043	40,925	34,791
Total Grass & Legume	531,752	515,140	535,392	561,330	559,220	547,435	525,315	489,625	418,415	416,338	448,925	509,996

Oregon Harvested Area, 2002 to 2012 (acres)

Grass Seed Overview: Grass seed acreage in Oregon is dominated by three crops: Tall fescue, annual ryegrass, and perennial ryegrass (typically, occupying 86% of all grass seed crop acres grown in Oregon). Oregon grass seed production numbers for these three crops continue to be over 200 million lbs. annually.

Oregon Grass and Legume Seed Crops Preliminary Estimates (2002 - 2012)												
	Production	Production	Production	Production	Production	Production	Production	Production	Production	Production	Production	Production
	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)	(000 lbs.)
Grasses	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	10 yr avg
Annual ryegrass	224,169	190,408	254,051	183,348	248,135	237,400	215,973	234,395	201,998	248,661	240,721	223,854
Perennial ryegrass	211,622	209,950	257,208	267,556	241,369	241,083	174,861	165,061	146,590	152,045	156,861	206,735
Tall fescue	252,458	203,340	223,803	219,158	238,783	245,587	262,237	268,223	186,363	171,195	190,247	227,115
Kentucky bluegrass	14,774	18,312	15,410	18,718	22,623	21,969	26,132	18,967	16,445	14,141	13,609	18,749
Rough bluegrass	3,016	1,785	2,565	2,302	2,283	2,369	2,486	2,235	2,071	2,200	2,575	2,331
Orchardgrass	16,566	15,425	15,954	11,838	14,579	11,897	16,277	13,291	13,143	12,281	10,382	14,125
Chewings fescue	7,342	4,400	4,344	6,594	10,025	10,997	12,202	12,149	9,713	9,649	10,290	8,742
Red fescue	6,926	6,129	4,454	5,082	5,057	7,521	7,485	8,846	10,885	10,665	9,399	7,305
Hard fescue	3,649	1,223	1,390	1,154	1,166	1,817	2,314	2,293	2,802	2,190	1,861	2,000
Colonial bentgrass	1,383	1,349	1,490	1,753	1,753	1,428	1,135	779	841	936	940	1,285
Creeping bentgrass	3,348	3,222	2,783	2,440	3,109	3,443	3,829	3,101	1,534	1,652	1,237	2,846
Total Grasses	745,253	655,543	783,452	719,943	788,882	785,511	724,931	729,340	592,385	625,615	638,122	715,086
Legumes												
Alfalfa	3,362	2,999	3,605	3,125	2,392	2,090	2,578	1,720	2,083	1,186	2,028	2,514
Red clover	7,038	5,480	5,944	7,509	8,644	9,088	8,938	10,776	10,505	17,883	12,857	9,181
Crimson clover	2,639	4,840	6,613	4,785	3,575	2,806	5,545	9,257	5,896	8,160	7,635	5,412
Common vetch	520	550	310	190	240	20	20	320	633	2091	1265	489
Hairy vetch	638	6	422	175	256	344	344	449	700	1320	988	465
White clover/Ladino	1,240	834	2,266	3,810	5,441	3,677	3,561	7,941	5,771	5,174	4,733	3,972
Arrowleaf clover	484		848	60.43	50.00	663	543	482	480	199	118	381
Total Legumes	15,638	15,081	19,644	20,442	21,301	21,529	21,529	30,945	20,068	36,013	29,624	22,219
Total Grass & Legume	760,891	670,624	803,096	740,385	810,183	814,092	746,460	760,285	618,453	661,628	667,746	738,610

Oregon Seed Production, 2002 to 2012 (000's lbs.)

Tall Fescue:

- Long term, tall fescue is the most widely grown grass seed crop in Oregon (10 year average acreage @ 146,600 acres).
- After falling to 106,000 acres in 2011, tall fescue seed acres rebounded to over 127,000 acres, but still below the 10 year average.
- 2012 Tall fescue yields are estimated to be 50 lbs. below the 10 year average of 1,551 lbs./ac.
- 2012 acres up 20,730 more acres (+19.5%) than a year ago; this was 60% of the total increase in grass seed acres grown this year.



Annual ryegrass:

- Acres above 10yr. avg, 2012 = 127,000, 10 yr. avg. = 122,000
- Estimated yields in 2012 (1,895 lbs/ac) below 2011 yields (2,026 lbs/ac), but above the 10 yr. average of 1,829 lbs/ac.
- Total 2012 annual ryegrass seed production @ 240 million lbs., 17 million lbs. above the 10 year average.

Perennial ryegrass

- Acres were up for the second year in a row, following the 2011 low of 91,000 acres. 2011 = 94,000 acres, whereas 2012 acreage estimates at 105,000 (up 11,000 ac.).
- 2012 acres still well below the 10 year average acreage of 143,000 acres.
- 2012 estimated yield of 1,492 lbs/ac. above the 10 year average yield of 1,459 lbs/ac.
- Total 2012 production estimated to be only 156 million lbs., well below the 10 year average of 206 million lbs produced annually.
- 2012 prices 19 cents/lb. better than in 2011.

Kentucky Blue Grass

- Acres continue to fall as more stringent fire ban regulations come into effect
- 2012 acres (10,570) lowest in 10 years, with the 10 year average at 18,000 acres annually
- 2012 yields were good, with the estimated average yield of 1,288 lbs./ac 230 lbs/ac above the 10 year average.
- Oregon total Kentucky Blue grass seed production lowest in 10 years, at 13.6 million lbs. Annual production (10 yr.) is at 18.7 million lbs.



Fine Fescues (Chewing's, Red, and Hard)

- Oregon estimates for the fine fescues had acres at 17,400 in 2012, down 600 acres from the previous year, but above the 10 year average of 15,700 acres.
- Chewing's fescue and red fescue occupied basically the same acres (7,570 and 7,430 acres respectively). Hard fescue acres stood at 2,440.
- Red fescue acres are the lowest since 2008. Acres in 2012 down by over 1,000 from 2011.
- Red fescue yields have improved significantly the past 4 years, with 2012 averaging 1,265 lbs/ac. Yields have been above 1000 lbs/ac. since 2007. 10 year average yields are at 855 lbs/ac.
- 21.5 million lbs. of fine fescue seed was harvested in 2012

Legumes

- Oregon's 2012 legume seed crops (41,000 acres) occupy less than 9% of total grass and legume seed acres.
- Red clover, crimson clover and white clover seed crops dominate the legume acres (36,500 acres), accounting for 89% of all legumes acres in Oregon.



Crimson Clover

- Although red clover acres fell by 2,500, 2012 acres (17,300) were still well above the 10 year average of 15,200.

- 2012 legume seed yields were mostly well above long term averages.
- 2012 saw Oregon produce just under 30 million lbs of legume seed.

Summary: Dr. Bill Young, OSU (March, 2013)

The above data is gathered by Dr. William (Bill) C. Young III from Oregon State University. Data is gathered on the value of all farm and ranch sales from each of Oregon's 36 counties. Dr. Young's summary comments are noted below:

The combined value of all grass and legume seed crops in the 2011-12 crop year (\$406 million) increased almost 21% from the value of production in 2010-11. 2012's increase of \$69.5 million adds to the almost 34% improvement (\$84.5 million) seen in 2010-11. However, the value of Oregon's seed industry is still down almost 20% from the historic high (\$505 million) in 2007-08,

As stated above, the value of grass and legume seed crops in 2012 was \$406 million. Of this total, grass seed crops accounted for 91.2% (\$370 million); legume seed crops were valued at \$35.6 million (8.8%). The value of all grass seed species increased 24.1% when compared with the 2010-11 crop year, while the value of legume seed crops decreased 6.6% over the previous year's sales of \$38.1 million.

Oregon growers harvested 408,000 acres of grass seed crops in 2012, an increase of 34,705 acres (+9.3%). Harvested acres of grass seed had fallen by 30% from the historic 2004-05 high of 528,760 acres. Thus, the value of the 2011-12 production was driven by both greater production and stronger prices. The increased value received from the 2010-11 crop was due to increased price, as acres were actually down another 2,370 acres in 2011. The \$370 million estimated value of the 2011-12 harvest remains almost 23% below what it was at the peak (2004-05).



As a result of lower seed yields compared to 2011, total poundage increased by just 2% (12,471,000 lb.) over the 2010-11 production year. The good news in 2011-12 was that prices received by growers strengthened for all grass species except two (rough bluegrass and creeping bent grass), which were unchanged. The total area of legume seed crops decreased by 2,118 acres (-4.9%) in 2011-12. In addition to fewer acres for most species, lower seed yields contributed to a 17.7% drop in total production (6.3 million fewer pounds) this year. Prices were stronger for most species with the exception of red clover and arrowleaf clover. The total estimated value of this year's legume seed production was \$35.6 million which is down 6.6% from 2010-11.

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