How Plants Get to Market:
The Plant Supply Chain and New Introductions
the fascinating business of breeding, trialing, and marketing new annuals, perennials, and woodies

Holly Scoggins, PhD
Assoc. Professor Emerita, Virginia Tech
Education Team, AmericanHort
President-elect, Perennial Plant Association

Garden Decorating Guide – Terra Nova Nurseries

AmericanHort truly represents the entire horticulture industry, including breeders, greenhouse and nursery growers, retailers, distributors, interior and exterior landscapers, florists, students, educators, researchers, manufacturers, and all of those who are part of the industry market chain. We are the leading national association for the green industry, and AmericanHort works tirelessly to connect the industry across states and segments, giving you opportunities that expand your network and resources.

Gardening is changing and so are the plants

“Plants do equal lifestyle; gardens, after all, are expressions of their creators. Planting with purpose may be the new mantra afoot in horticultural consumerism, if only because we have so many options for how to spend our time and treasure.”

“What does it do?” asks today’s consumer. And there are more plant consumers in 2020-2021 than ever.

What do market researchers know about end consumers of plants?

You are overwhelmed by selection
• yet new plant introductions continue to increase and are the lifeblood of our industry
You will only purchase plants in full bloom
You are brand-driven
Subaru, KitchenAid, etc.
You aren’t willing to spend money on plants (too generic)

Truth? Our industry…

Has not convinced consumers of the amazing value of plants.
Has not adequately communicated (and charged for) costs of production inputs, labor, trucking, etc.
Could improve marketing

The plant supply chain (many variations on this)
No one walks into a garden center and asks “What’s old?” – Dr. Allen Armitage

**New. Plants. Sell.**

Ex: Hydrangea, Echinacea, Heuchera... Absolutely nuts. 200+ cultivars EACH

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**How do I help make you a smart shopper?**

- Understand the supply chain
- Quality costs money
- Tags don’t tell you everything

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**Breeder or finder**

- Independent (professional or amateur)
- University or public garden
- Corporate/R&D
  - Many categories (seed, vegetative, vegetable)
  - International and dynamic
  - Can be vertically integrated supply chain
- Sportfishing!
  - Propagators, growers, etc.

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**Why? Ornamental plant breeder’s possible goals:**

**Practical:**
- Disease resistance
- Longer flowering time
- Sterility
- Reduced flop
- Production characteristics

**Novelty:**
- Color break (flowers or foliage)
- Flower type (double, quill, etc.)
  - New
  - New
  - New
  - New
  - New

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**Plant introduction agencies**

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**Plant patents**

- Discoverer/breeder can file
- Has to happen within 1 year of discovery
- Takes ~ 1 yr; $1500-$3000
- PP4987 = Plant patent applied for
- Duration of 20 years
- Why?
  - Unusual/superior plant that growers/consumers will value (enough to pay royalty)
Trademarks

Does not control propagation, just protects the name given by a particular seller

TM = we claim trademark rights
® = federally registered trademark; listed on USPTO website ($400)

Plant breeding programs, branded marketing programs

CANNOT trademark/register cultivar names

SHOULD be used to identify SOURCE of plant, NOT a particular plant.

Protects prospective purchaser from confusion (not)

Examples

Coreopsis Big Bang™ Series
Coreopsis x ‘Star Cluster’PPAF#32695

Echinacea purpurea Supreme™ Series
  • Echinacea Supreme Flamingo™
  • Plus 4 more
  • Terra Nova Nurseries

Star® Roses Pink Knock Out®
Rosa ‘Radcon’ PPAF#2510

New plants in production

Trials-to-market period much shorter
Vegetative/micropropagation (often contracted) by licensed propagator
Seed (slower to build supply)

Ornamental plants: approximately $10 billion
(U.S. wholesale value)

Produced in
Container nursery
Field (in ground)
Greenhouse
LOTS of overlap

Marketed and sold at
Wholesale
Retail
Combination thereof

Floriculture - $4+ billion

Nursery - $4+ billion
Fate of wholesale ornamental plants:

Garden centers
- IGCs + retail nurseries (19%)
- Big box/mass marketers (17%)

Nurseries and greenhouse that sell direct to Consumers (16%)

Supermarkets (7%)

Landscape contractors (14%)

Big box stores

Utilize large regional growers

Contracts

Able to sell at lower prices

Volume

Low/no profit margin as plants aren't main product line

Variety

Bread and butter but also some gems

Everything is in bloom (retail ready)

Quality?

Can be good, can degrade rapidly

GET THEM FAST

Independent Garden Centers (IGCs)

Single store (or small chain) and family-owned

Service + knowledge

May grow some of their own

Often utilize regional growers as well

Some wholesalers only sell to IGCs

Need to sell at higher prices

Profit margin is everything since plants ARE main product line (and are perishable)

Variety

Usually terrific - Not just “full bloom”

Quality?

Should be good!

Shop early and often

E-commerce

Grower and retailer dilemma: SPRING

USUALLY a three-month window = 60-80% of annual sales

USUALLY totally, utterly weather-dependent

Late summer, fall perennials + ornamental grasses - green

Avg ticket May - $56-$75

Avg ticket August - $26-$35

Sales vs. last chance table

Some IGC sales are seasonal, intended as promotions

End of season sales on woody material, so they don’t have to overwinter

Beware the random marked down/last chance pile

Quality – how can you tell?

Fungus gnats and whitefly

Weird smell

Pop that pot!

Healthy pale roots

NOT root bound

- Esp. woody plants

Well rooted

- NOT growing media falling out of pot
How do I get my local garden center to carry…

Hot new plants
Fewer invasive plants
More natives
Something I saw in a magazine

WHATEVER...

Trials

Comparative trials:
Breeder
Plant Intro Agency
Brand trials

Trials + displays:
Universities
Public gardens
Propagators

http://trialgardens.raker.com/trial-data

Broker, distributor, promoter, associations...
(you may recognize some of these as “brands”)

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