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Industry Impatiens Survey Results Are In!

Results from growers and retailers show that while impatiens production and sales were down in 2013, overall total business sales reductions and increased costs were less than 5% due to impatiens downy mildew for most.



2014 Sponsor

Researchers at Michigan State University, Cornell Cooperative Extension, and Cornell University recently conducted a survey of greenhouse growers and retailers that sought to determine the impacts of impatiens downy mildew (IDM) on this industry. The on-line survey was open to U.S. growers/retailers during the entire month of October 2013. The survey aimed to gather information on the impact of the disease, grower and retailer responses to the disease, as well as information on trends in consumer purchasing.

There were a total of 298 participants in the survey, of which 122 were growers, 138 were combination grower-retailers, and 38 were retailers. Participants were from

thirty six states and ranged from small growers (under 2,000 sq ft) to large growers (500,000+ sq ft). When asked if IDM was seen in the landscapes in their area, 16% responded that IDM was reported from landscapes or gardens in their area in 2011, 66% noted IDM in 2012, and 55% noted IDM in 2013. Fifteen percent of grower participants said they had seen IDM in their greenhouse in 2012, while only 7.3% said they saw it in 2013. Only half of the businesses used a fungicide prevention program in 2013.

Participants who had a retail component to their business were asked about their sales of impatiens in 2012 and 2013. Over 70% said they sold impatiens in

2013 (Figure 1), although for most it was significantly less than what they sold in 2012. About half the retail participants felt that less than 25% of customers were aware of IDM when entering their retail store in 2013, while others reported greater awareness: 27% felt 25-50% were aware, 18% felt 50-75% were aware, and 5% felt 50-100% of their customers were already aware of the disease. Almost all (87.5%) of the retail participants said they made some effort to educate consumers about IDM in 2013 and they did so primarily by using signage near the plants or having cashiers mention it to the consumer upon checking out of the store (Figure 2).

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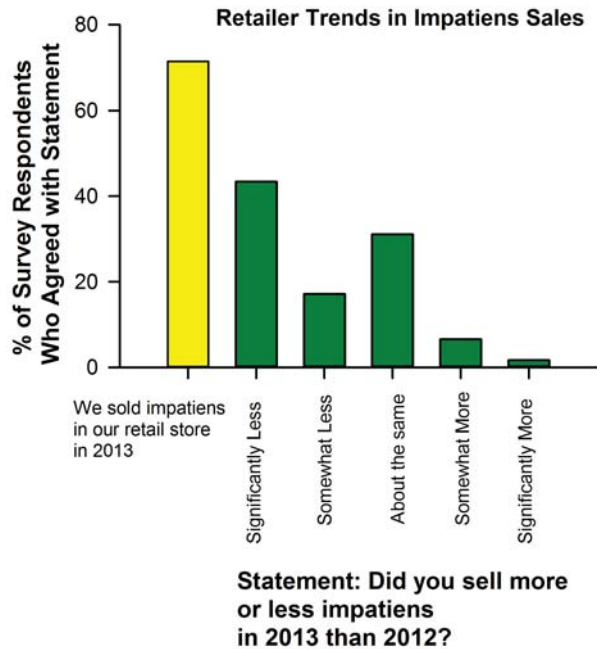


Figure 1. Retailer Sales Trends of Impatiens

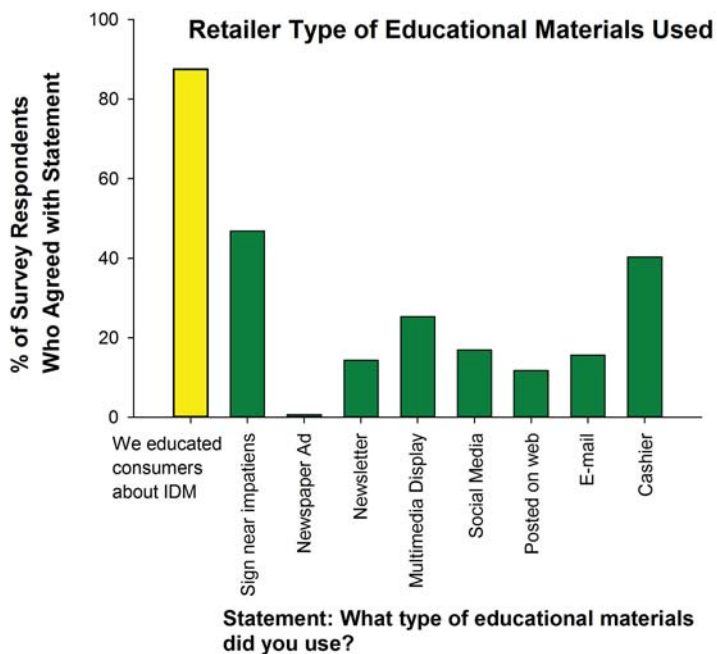


Figure 2. Retailer education on IDM in 2013

Participants who produced plants were asked about their change in impatiens production in 2013 as compared to 2012 due to IDM (Figure 3). Most (over 50%)

decreased production, while many (about 20%) said they either grew the same number in 2013 as compared to 2012 or (about 20%) they grew no impatiens at all in 2013. Of

Cooperating Universities



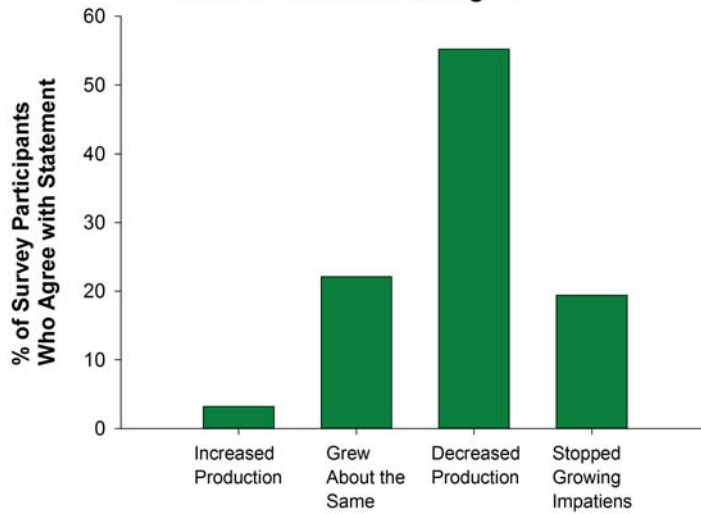
Cornell University
Cooperative Extension
of Suffolk County



In cooperation with our
local and state greenhouse
organizations



Grower Production Changes



Statement: What percentage did you increase/decrease production of impatiens in 2013 as compared to 2012?

Figure 3. Grower increase or decrease in impatiens production in 2013 as compared to 2012 due to IDM.

Increased Production by Species Across All Container Sizes for Growers in 2013 as Compared to 2012 Due to IDM

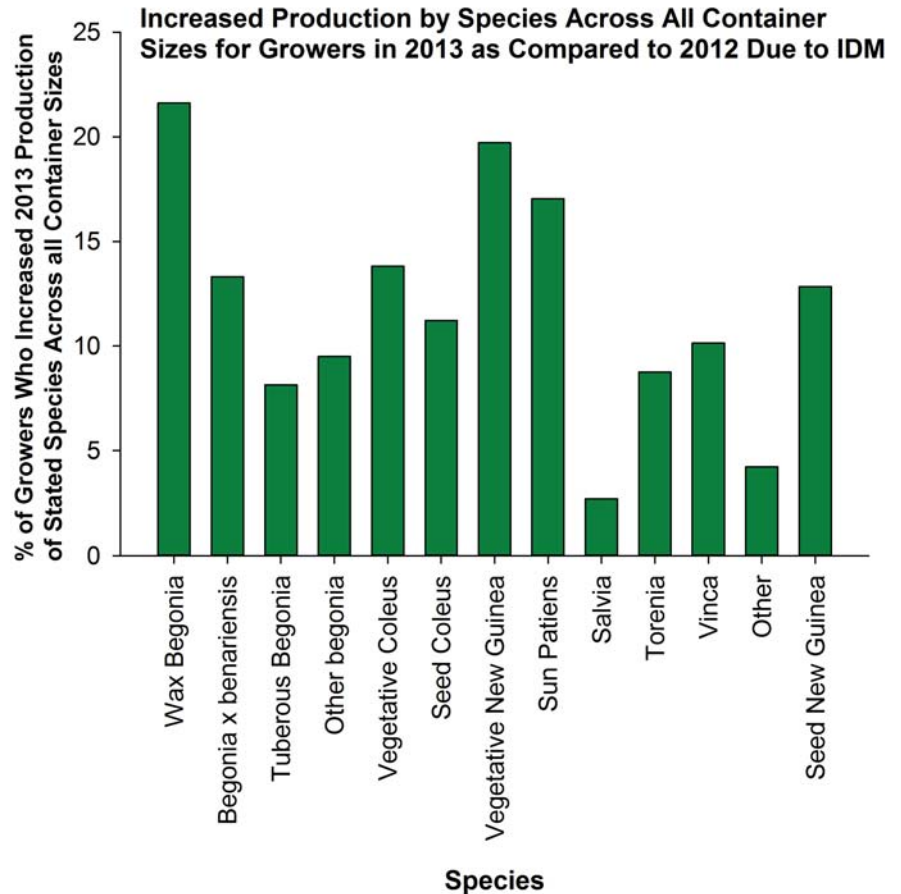


Figure 4. Production changes by species across all container sizes for growers and grower/retailers who said they increased production of other crops due to IDM.

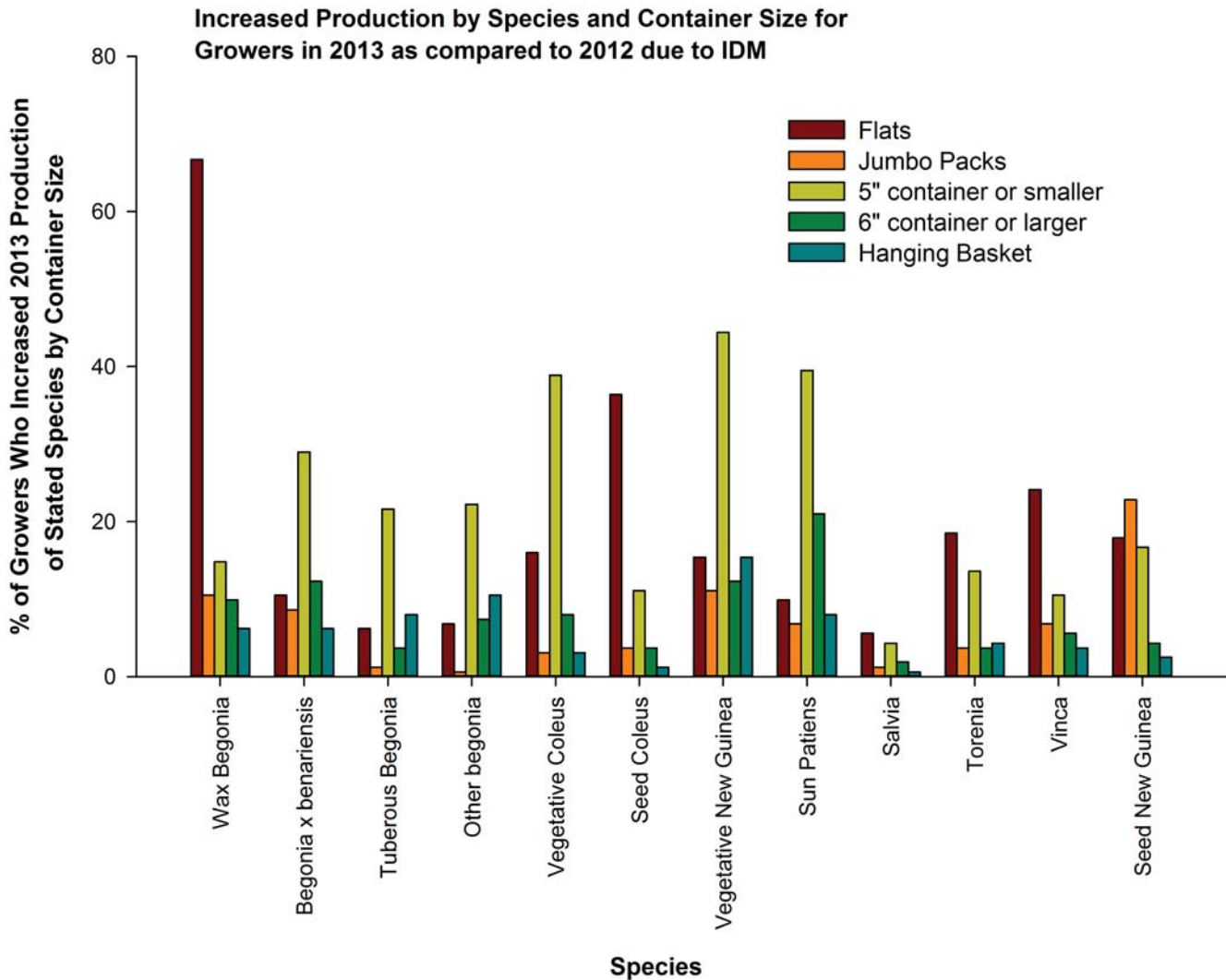


Figure 5. Production changes by species and container size for growers and grower/retailers who said they increased production of other crops due to IDM.

those that decreased their production, most (57%) reduced production by 50% or more in 2013 compared to 2012, with 27% producing 90-100% fewer.

When growers were asked if they planned to grow impatiens in 2014, 59% responded that they planned to produce impatiens, though 50% of participants responded that they would grow fewer impatiens

than in 2013.

A full 65% of survey participants said they changed their crops produced in 2013 because of IDM. Of those participants that said they changed their production mix of species based on IDM in 2013, Figure 4 shows which species were increased in 2013 production over 2012 across all container sizes. Wax begonia, vegetative New

Guinea impatiens, and SunPatiens were the top three species increased. When looking at the same data broken down by container size (Figure 5), for flats, the biggest increase in production was for wax begonia and seed coleus. For jumbo packs, seed New Guinea impatiens had the largest increase in production. For 5" or smaller containers, vegetative New Guinea impatiens,

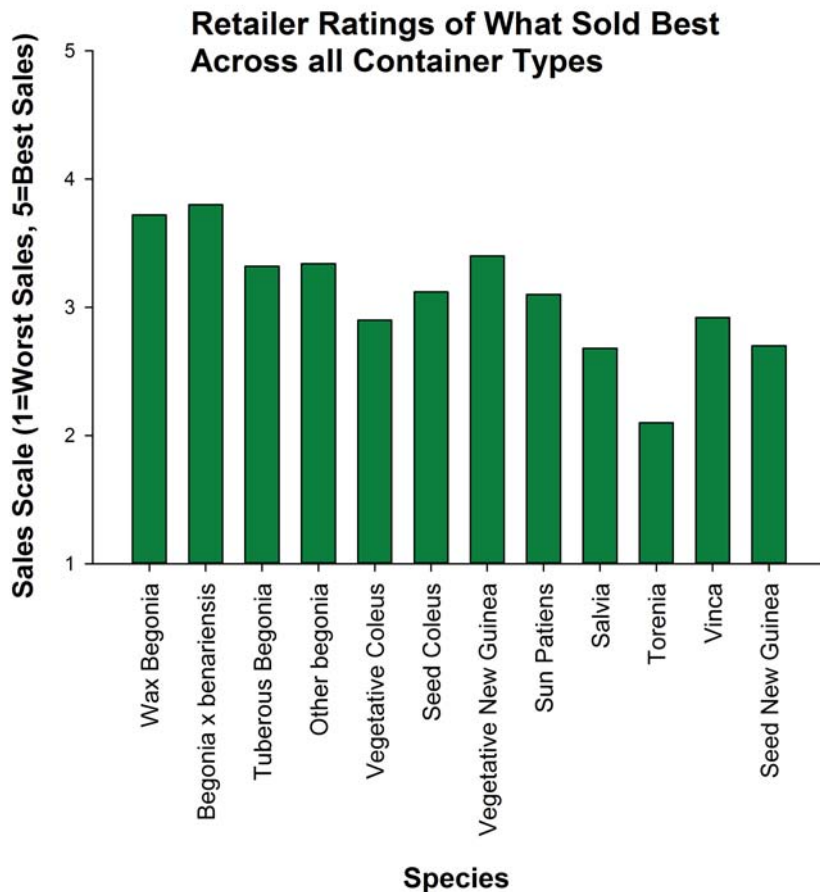


Figure 6. Retail Respondents: Of the crops you increased holdings of in response to IDM, what sold best? Means are presented here for all container types combined (crops rated on a scale of 1-5, 1 being the worst, 5 being the best).

SunPatiens, and vegetative coleus increased in production the most. For 6" or larger containers, SunPatiens and vegetative New Guinea impatiens saw the largest increase. For hanging baskets, vegetative New Guinea Impatiens and other begonias had the largest increase.

Of those production changes to replace impatiens, retailers rated what sold best on a scale of 1-5 (1 being worst, 5 being best; Figure 6). The

best seller was *Begonia x benariensis*, followed by wax begonia and vegetative New Guinea impatiens. Those that sold worst were Torenia, followed by Salvia, and seed New Guinea impatiens. When breaking that data down by container size (Figure 7), for flats wax begonia sold the best. For jumbo packs, vegetative New Guinea impatiens, wax begonia, and seed New Guinea impatiens sold the best. For 5" containers or smaller, SunPa-

tiens, *Begonia x benariensis*, and tuberous begonia sold the best. For 6" containers or larger, wax begonia, vegetative New Guinea impatiens, and *Begonia x benariensis* sold the best. For hanging baskets, seed coleus, all begonias and vinca sold the best.

Retail survey participants were also asked what they felt were the most important reasons for consumer resistance to purchasing impatiens alternatives. The number one reason for resistance was price: presumably alternatives to impatiens were more costly. The second reason for resistance was that the consumers still wanted impatiens, followed by unfamiliarity with alternatives or not liking the alternatives.

In terms of impacting business, the greatest number of participants (33%) said that IDM had no effect on overall total business sales or (24%) only a slight reduction in sales (Figure 8). Some respondents (~18%) even felt that they saw greater overall sales in 2013.

For those businesses that felt they did have a reduction in overall total sales due to IDM in 2013 as compared to 2012, the majority (~65% of respondents) felt that sales reduc-

Retailer Ratings of What Sold Best in 2013 for Alternative Impatiens Crops, by Species and Container Type

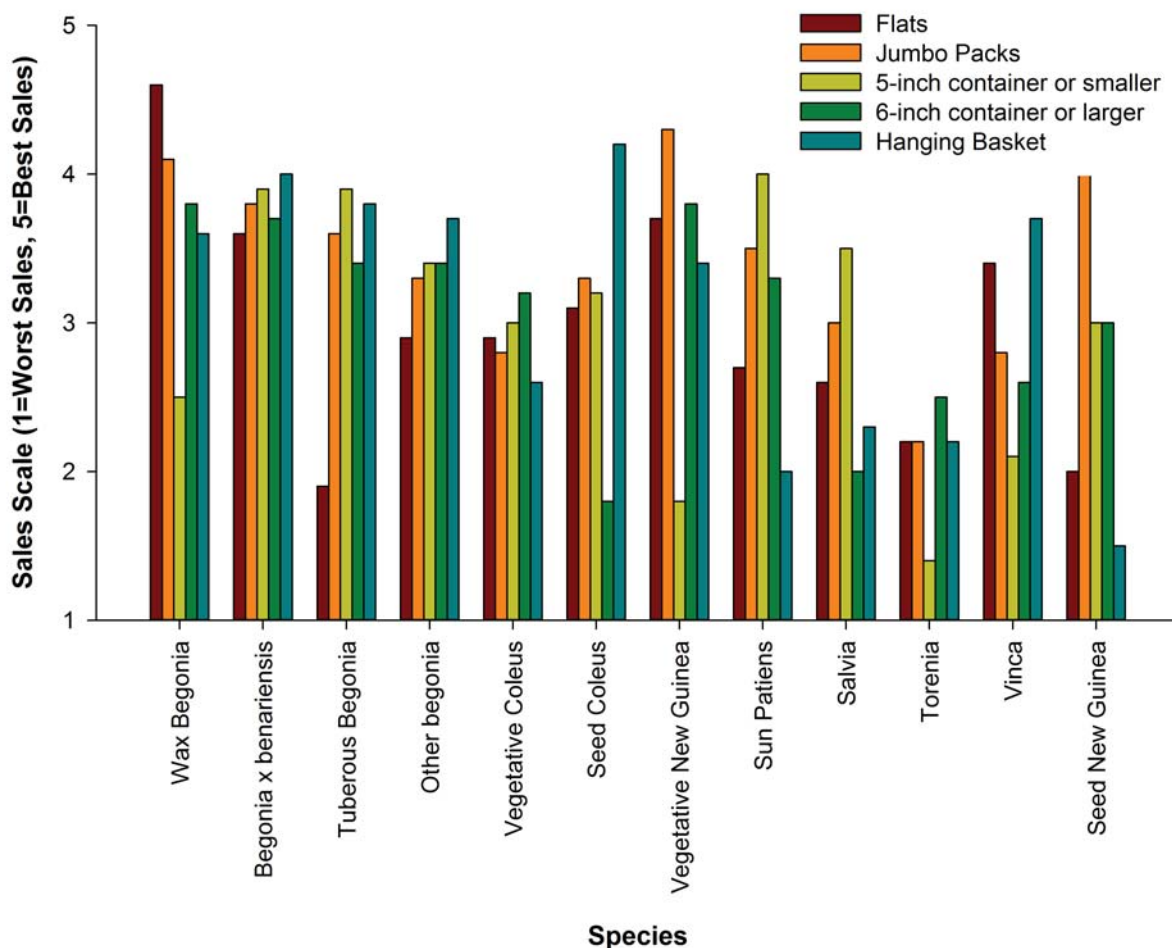


Figure 7. Retail Respondents: Of the crops you increased holdings of in response to IDM, what sold best? Means are presented here for each container type (crops rated on a scale of 1-5, 1 being the worst, 5 being the best).

tion was less than 5% (Figure 9), though some businesses were more negatively affected. In addition, the majority (89%) said they didn't feel they lost contracts because of IDM.

Finally, most survey respondents (~63%) felt that their increase in costs due to IDM was less than 5% in 2013 as compared to 2012 (Figure

10). Plant material and supplies were the two categories of business expenses that 25% or more of respondents rated as "somewhat increased" or "significantly increased" in costs (Figure 11).

In summary, according to participants, IDM occurrence was slightly down in 2013 compared to 2012, though 56% of participants indicated

that the disease had occurred in landscapes in their area (68% in 2012). IDM was found in some greenhouses in 2013 (7.3% of respondents): this was down from 15% in 2012, perhaps an indication of better preventative management as well as reduced production. Impatiens continue to be produced and sold, though participants indicate a downward trend. Many

Impacts of IDM on Overall Business

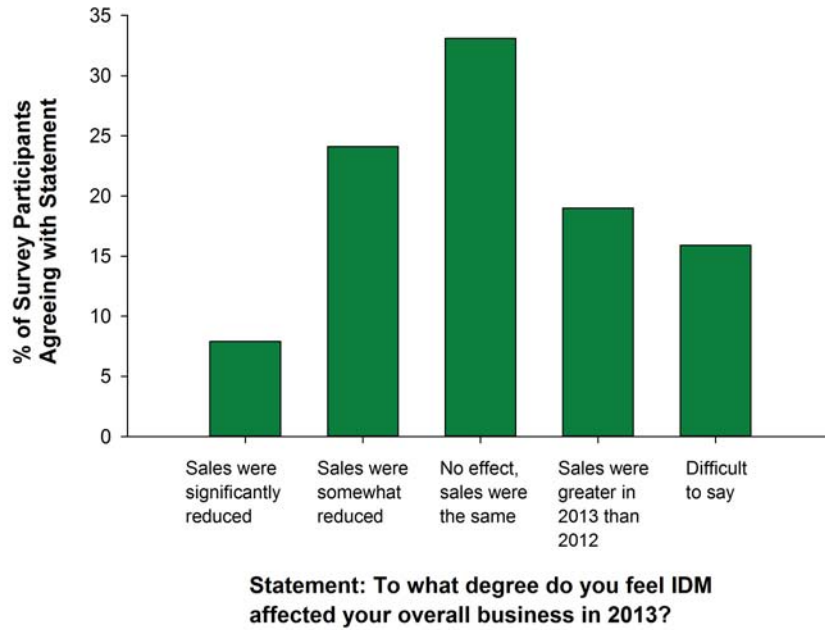


Figure 8. Respondents' estimates on IDM impacts on overall business sales.

Estimated Reduction in Overall Total Sales Due to IDM

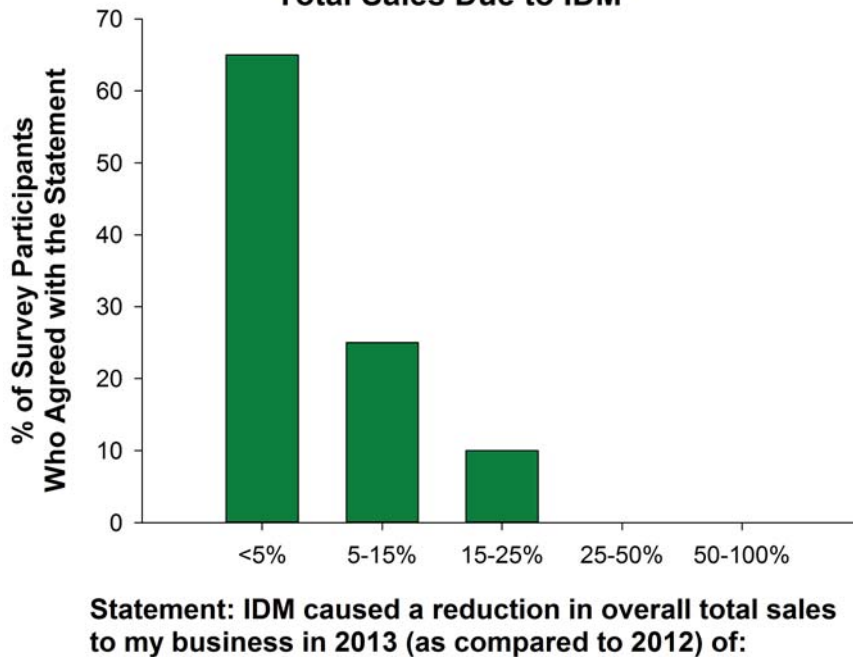


Figure 9. Those survey respondents who felt they had a reduction in overall sales due to IDM estimating the percent of that reduction.

businesses still grew or sold impatiens in 2013, although less than in 2012, and many businesses plan on producing impatiens in 2014, though less than were produced in 2013. While the majority of customers were unaware of IDM when entering retail stores in 2013, most retailers did make an attempt to educate consumers. As a response to IDM, most growers (65%) shifted their production mix. Begonias and New Guinea impatiens were amongst the impatiens replacements with the largest increase in production and were amongst the best selling. While some businesses indicated that they felt IDM had a greater impact, most businesses felt that IDM had little to slight impact on overall sales (<5%) and also felt that cost increases due to IDM were less than 5%.

Please note that this survey was a national survey and participants' answers no doubt varied by region, as the severity of the disease has varied greatly between as well as within regions.

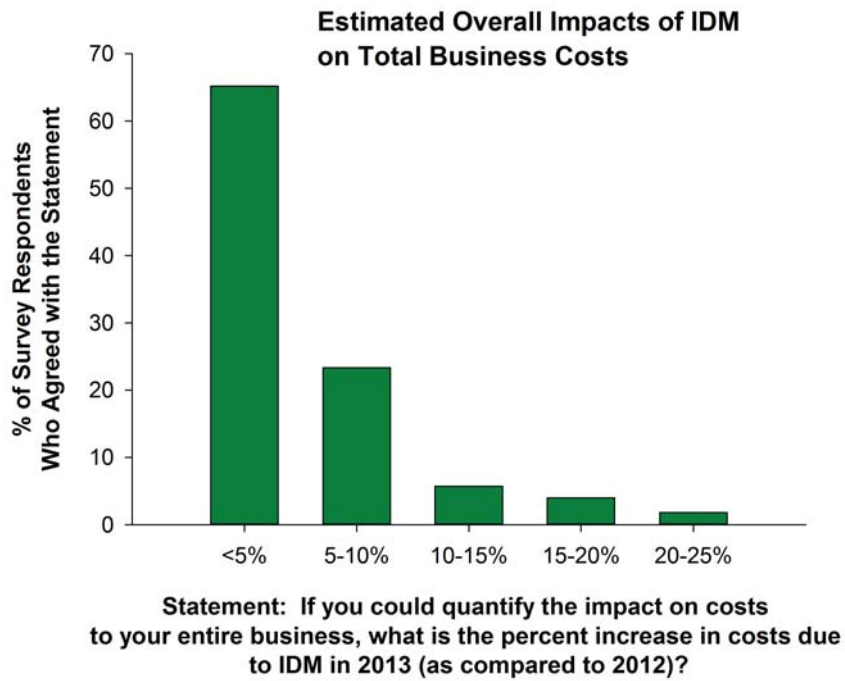


Figure 10. IDM impact on overall business costs.

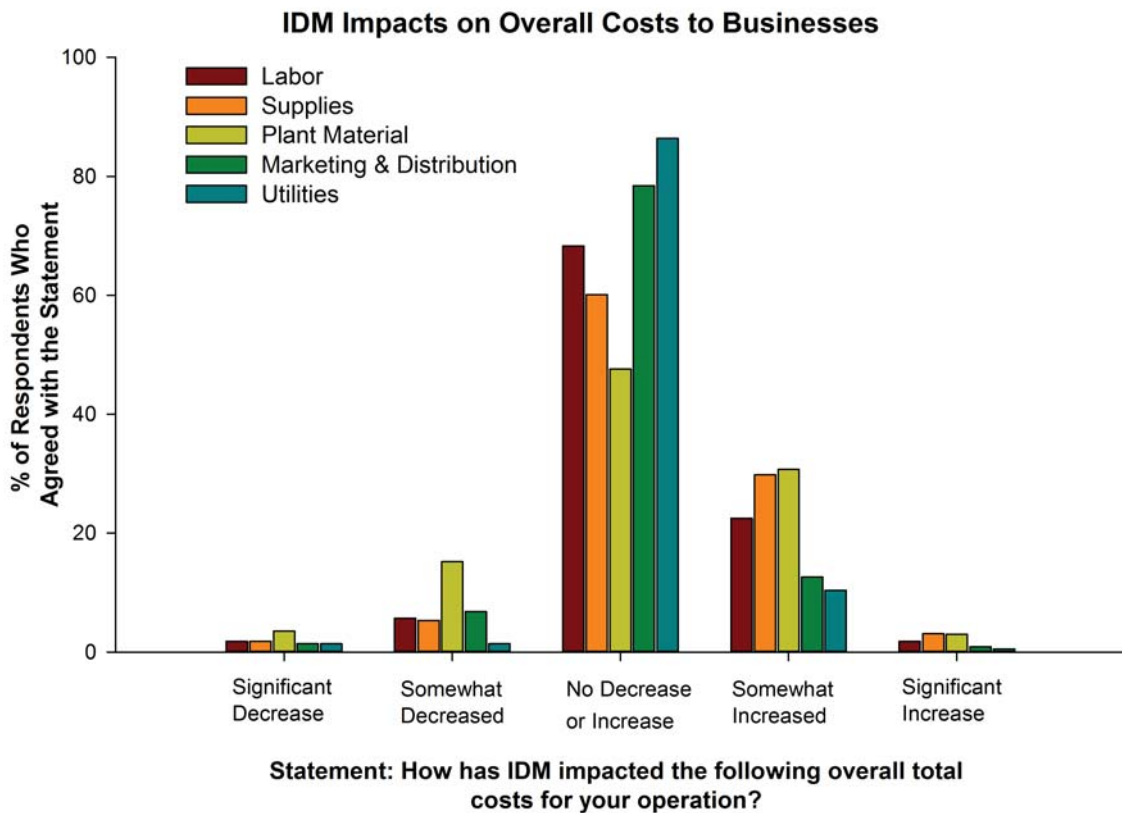


Figure 11. Changes in overall business costs due to IDM.