

The 2022 Plant Shortage Report



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Explore the wholesale plant and tree shortages across the US to make better plant selections and substitution decisions.

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Adapting to the Persistent Plant Shortage Crisis



2022 is shaping up to be the year of shortages across the landscaping supply chain. Plastic containers are in short supply, fertilizer costs are up by a whopping 100%, and many wholesale nurseries are woefully understaffed due to the labor shortages. It's no wonder that we have a persistent plant and tree shortage across most regions in the US.

Additionally, most wholesale growers are paying around 12-14% higher costs due to inflation. High input costs and existing shortages are both pushing up wholesale plant prices by around 20% across the country.

In 2022 there's a greater fragmentation in the plant shortage trends across the states. While the shortages in the North are more pronounced for shade trees and conifers, the Southern states are still reporting a severe shortage of perennials, shrubs, and groundcovers. This is reflected in the higher average price increase for trees in the North and ornamental grasses in the South. Both categories were reported to have a 27% increase compared to the last year. Perennials and shrubs with severe shortages in the South follow closely with 25% and 19% price hikes, respectively, for 2022.

We launched the 2021 Plant Shortage Report last year to build awareness and help landscaping businesses stay prepared. As we approach the peak landscaping season in 2022, we want to continue our efforts to map the severity of the plant shortages. I hope you find this report helpful for your business planning.

All the best for your 2022 landscaping season ahead!

Regards,



A handwritten signature in black ink that reads "Marc Elliott".

Marc Elliott
CEO, GoMaterials

Chronology: What's Keeping the Plant Shortages Up in 2022?

BEFORE 2022

IN 2022

2008 - 2012

Recession reduces nursery production by 50%

2015 - 2020

Urban greening, housing boom boosts landscaping demand

2020

COVID disrupts resin & plug supply

Restrictions on visas creates a labor backlog

2021

Texas freeze causes an inventory hole

Rising inflation increases nursery input costs

2022



Tree whip availability shrinks due to restricted supply



Plastic resin shortage is limiting the supply of pots for plants



Fertilizer costs are up 100%, while fuel costs are up by 50%



Rising multifamily housing starts are increasing demand for plant materials



Water conservation policies boost the demand for drought-tolerant materials

2022 Plant Shortages at a Glance

The 2022 plant shortages are complex, with many underlying factors impacting availability and pricing. The following trends and pricing analysis are based on the proprietary data collected by GoMaterials across multiple Eastern and Southern US States in the first half of 2022. However, actual pricing and availability may vary based on the region and fluctuations in the softscape material supply chain.

Shortage Trends by Category, Size, and Region

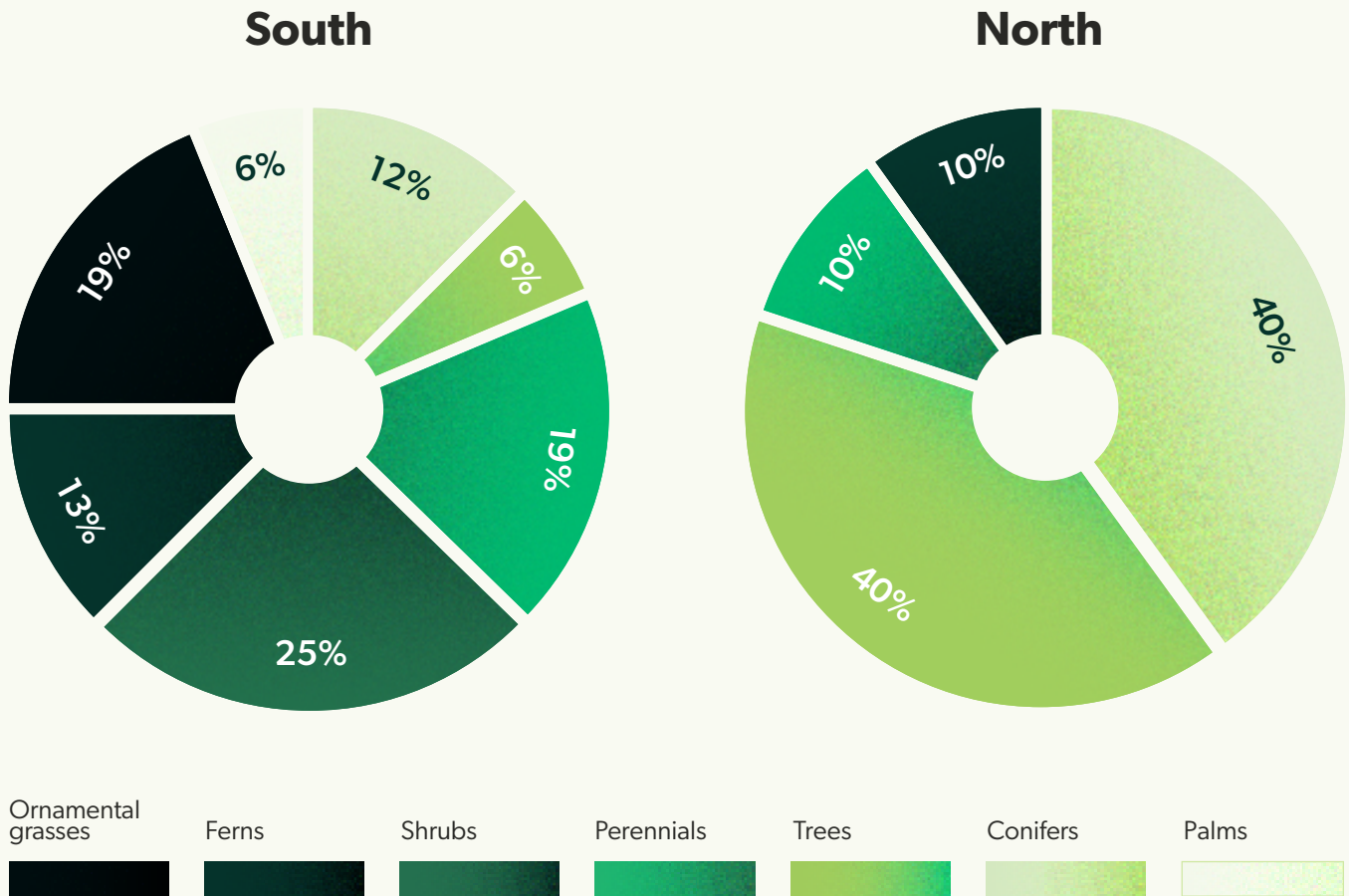
2022 category trends diverge with distinct shortage patterns across the North and South regions. While trees and conifers lead the shortages across the North, in the South there's a greater fragmentation, with shrubs, perennials, and ornamental grasses leading the shortages.

The reasons behind the shortages also vary based on the region. For instance, the plant shortages in the South have been exacerbated due to the lasting effects of the Texas Freeze and a greater demand for drought-tolerant plant materials. On the other hand, limited supply of tree whips and unprecedented demand are the main causes of shortages in the North.

The sizes impacted by the shortages are consistent with last year's trends. 1-3 Gallon pot supply remains severely impacted for shrubs, perennials, and ornamental grasses. For conifers, 6' to 9' height sizes and for trees 2" to 4" caliper varieties are the hardest to source in 2022.



Category Distribution of Plants in Short Supply



🌿 **63% of the plants facing shortages in the South are shrubs, perennials, or ornamental grasses.**

🌿 **80% of the plants facing shortages in the North are trees or conifers.**

Top Plant Materials in Short Supply with Substitution Guidance

South Region Shortages

Name	Shortage Sizes					Substitution Guidance	Severity of Shortage
	1G	3G	5G	7G	15G+		
Myrica Cerifera Southern Wax Myrtle		X		X	X	Settle for smaller specs or sizes <i>E.g. You can go for 12"-15" size in a 3G pot instead of the 24" tall</i>	SEVERE ■■■■■■■■
Ilex Vomitoria 'Schillings Dwarf' Dwarf Yaupon Holly Schillings		X				Settle for smaller heights like 8-10" instead of the average 12-14" for a 3G	SEVERE ■■■■■■■■
Alpinia Zerumbet 'Variegata' Variegated Shell Ginger		X		X		Swap for Alpinia Zerumbet (Shell Ginger) or smaller size	SEVERE ■■■■■■■■
Rhaphiolepis Indica Indian Hawthorn		X	X	X		Swap with other varieties or settle for a smaller spec of 8-10" depending on gallon size	SEVERE ■■■■■■■■
Muhlenbergia Capillaris Pink Muhly Grass	X	X				Swap with Panicum Virgatum (Switchgrass) or Cortaderia Selloana (Pampas Grass) or Miscanthus (Silvergrass)	MILD ■■■■■□□□
Asparagus Densiflorus 'Myers' Foxtail Fern	X	X				Settle for a difference size or smaller specs	MILD ■■■■■□□□

North Region Shortages

Name	Shortage Sizes				Substitution Guidance	Severity of Shortage
	6' Height	7' Height	8' Height	9' Height		
Thuja 'Green Giant' Green Giant Arbovitae	✗	✗	✗	✗	Swap with other hedging conifers (Thuja 'Smaragd' for example)	SEVERE ■■■■■■■■
Picea Abies Norway Spruce	✗	✗	✗	✗	Swap with Picea Pungens (Blue Spruce), Picea Glauca (White Spruce) or Abies Concolor (White Fir)	SEVERE ■■■■■■■■
Tsuga Canadensis Eastern Hemlock	✗	✗	✗	✗	No easy substitutes, a close possibility can be Pinus Strobus (Eastern White Pine)	SEVERE ■■■■■■■■
	2" Caliper	2.5" Caliper	3" Caliper	4" Caliper		
Ginkgo Biloba Ginkgo Tree	✗	✗	✗	✗	No close alternatives	SEVERE ■■■■■■■■
Carpinus Betulus 'Fastigiata' European Hornbeam	✗	✗	✗	✗	Swap with Liriodendron Tulipifera Slender Silhouette (Tulip Tree) or Quercus Robur 'Fastigiata' (Upright English Oak)	SEVERE ■■■■■■■■



2022 Pricing Trends

Overall, softscape materials are 20% to 27% more expensive than last year for the sizes in short supply. However, there are outliers that have seen price reductions, which can be attributed to price corrections after aggressive increases in 2021. Some of the plants that are now recovering from the shortages such as Pink Muhly Grass or Foxtail Ferns have also seen their prices drop.

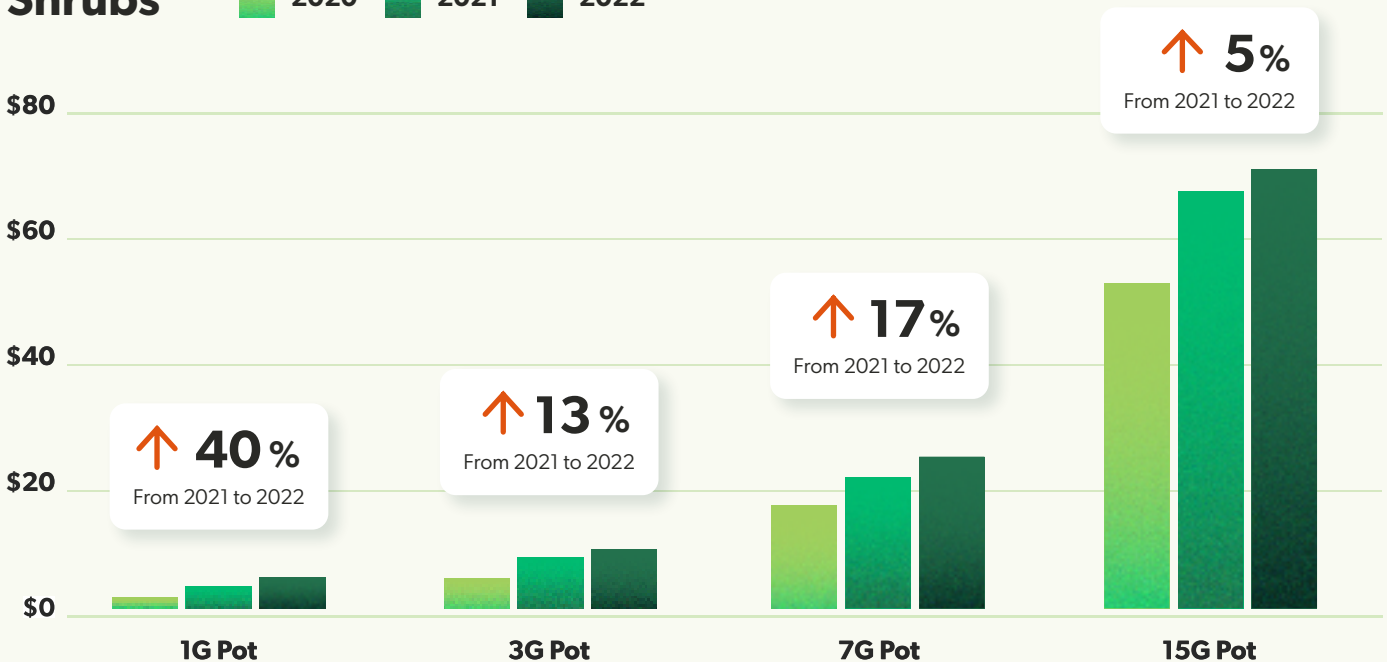
Plant Prices in the South by Biggest Shortage Categories

While large pot sizes of shrubs, perennials, and ornamental grasses were already hard to find in 2021, in 2022 the key trend seems to be the continued price hikes in the smaller sizes. For the materials in short supply, 1 Gallon shrubs and

perennials, and 3 Gallon ornamental grasses have seen the highest rise in their wholesale prices this year. Interestingly, the larger sizes of shrubs have seen the smallest increase, perhaps having already reached their upper price ceiling in 2021.

Shrubs

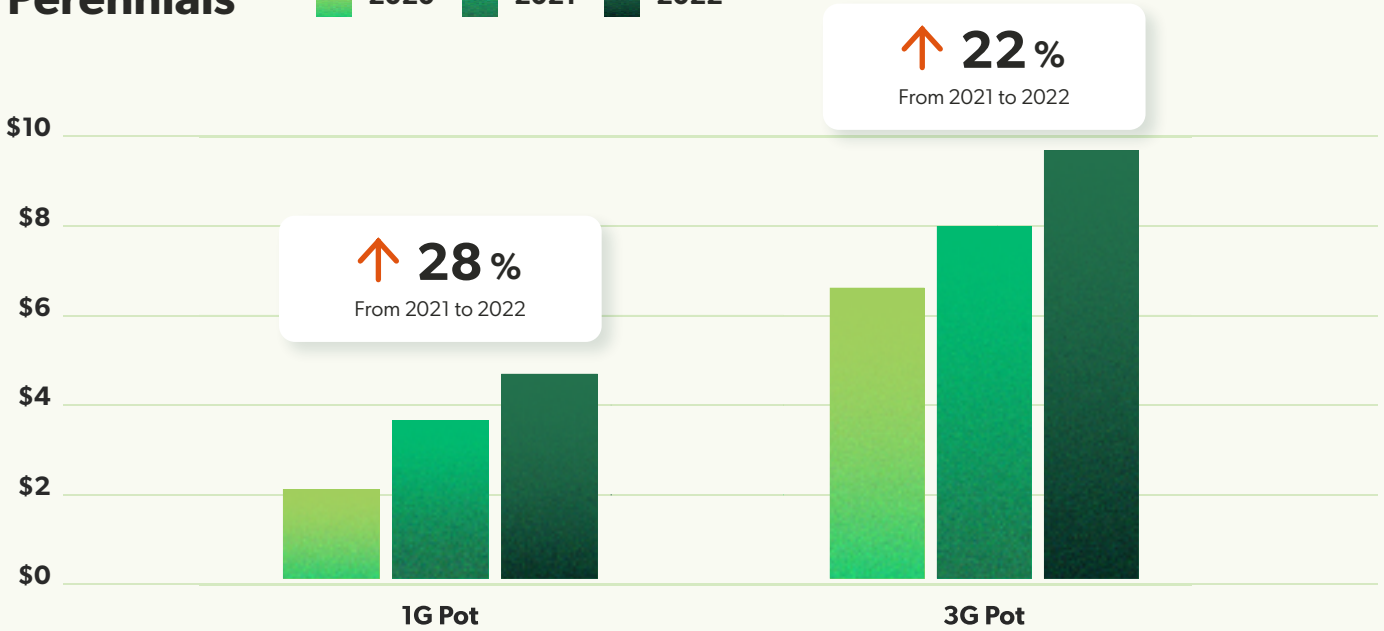
2020 2021 2022



Prices for 1-gallon shrubs in short supply have seen the highest increase of 40% in 2022

Perennials

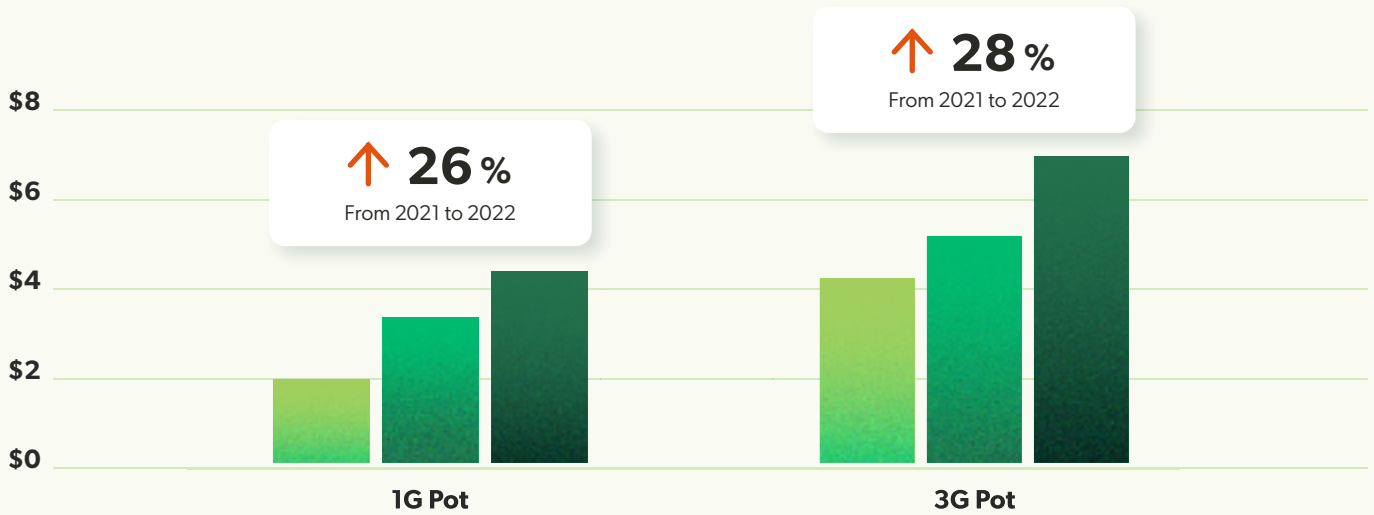
2020 2021 2022



Prices for 1-gallon perennials in short supply have seen the highest increase of 28% in 2022

Ornamental Grass

2020 2021 2022



Prices for 3-gallon ornamental grasses in short supply have seen the highest increase of 28% in 2022

Plant Prices in the South by Biggest Shortage Items

Items still in severe shortages

Name	Sizes	2021 vs 2020 Pricing	2022 vs 2021 Pricing
Myrica Cerifera Southern Wax Myrtle	3G	↑ 25%	↑ 24%
	15G	N/A	↑ 41%
Rhaphiolepis Indica Indian Hawthorn	3G	↑ 24%	↑ 25%
Ilex Vomitoria 'Schillings Dwarf' Dwarf Yaupon Holly Schillings	3G	↑ 31%	↑ 16%
Alpinia Zerumbet 'Variegata' Variegated Shell Ginger	7G	↑ 19%	↑ 12%

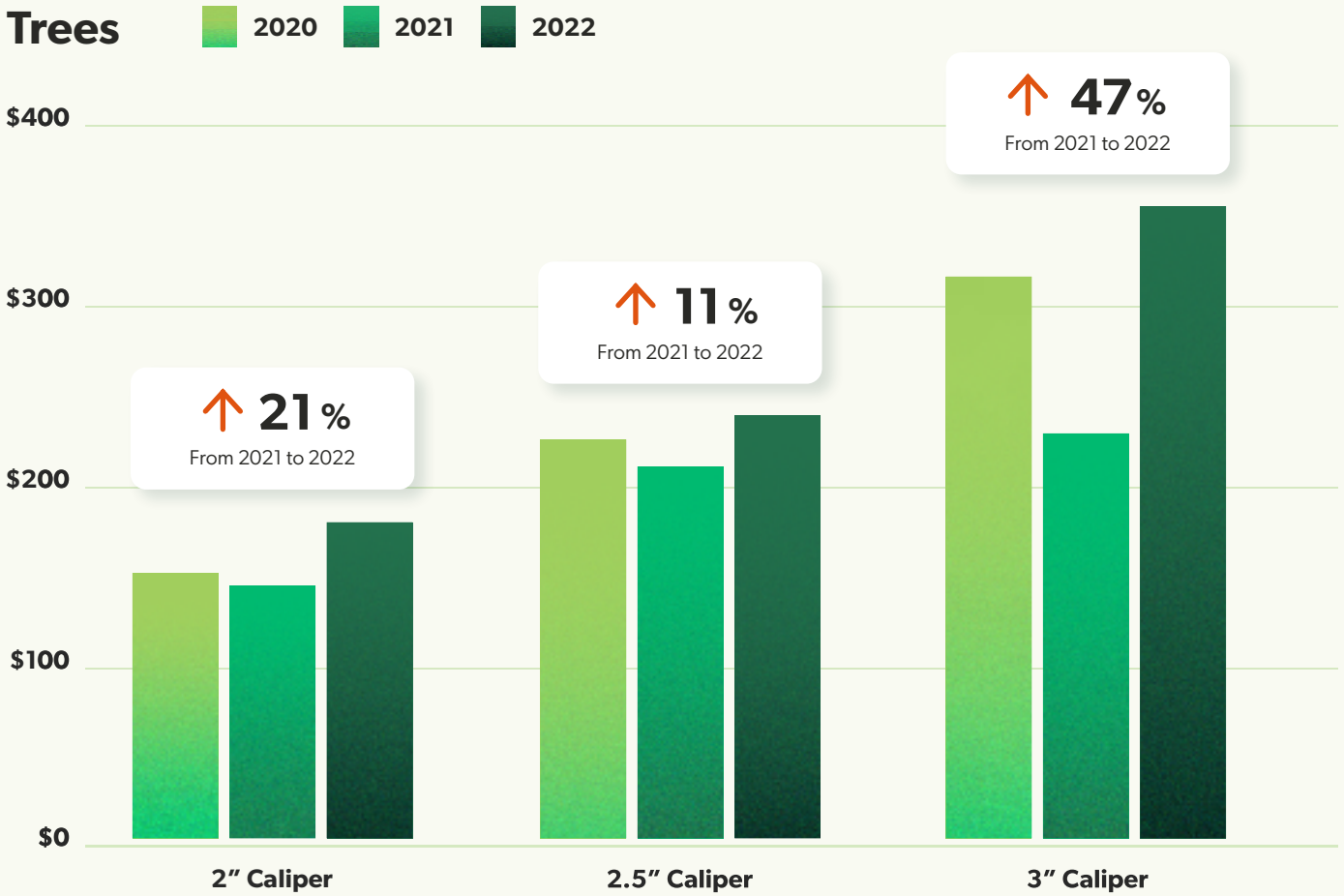
Items recovering from the shortages

Name	Sizes	2021 vs 2020 Pricing	2022 vs 2021 Pricing
Asparagus Densiflorus Foxtail Fern	1G	↑ 64%	↓ 22%
	3G	↑ 111%	↓ 18%
Muhlenbergia Capillaris Pink Muhly Grass	1G	↑ 122%	↓ 8%

Plant Prices in the North by Biggest Shortage Categories

Prices for caliper trees in short supply have increased between 11% and 47% from 2021 to 2022. For conifers in short supply, their prices saw the biggest hike last year, having increased

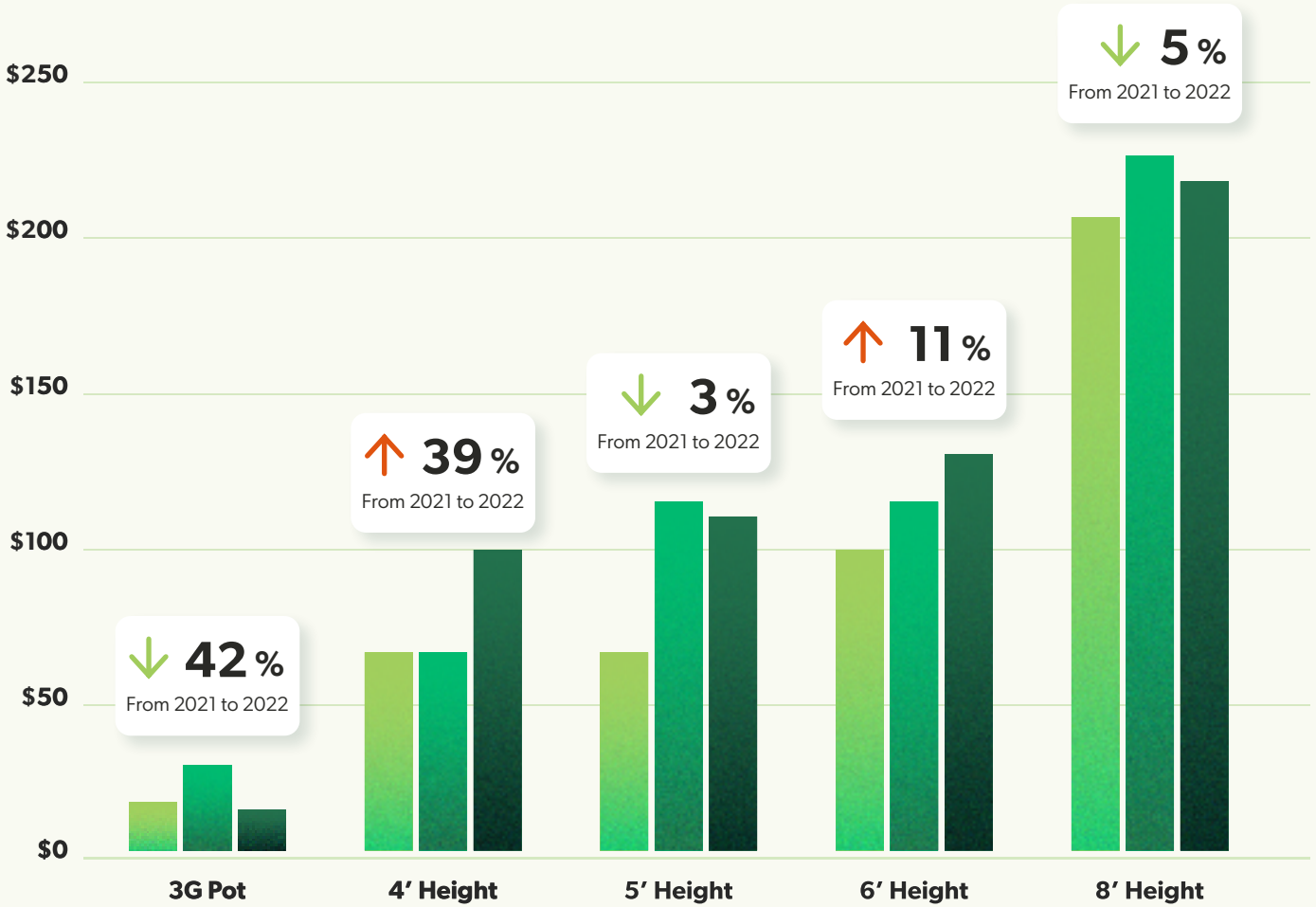
by an average of 35% from 2020 to 2021 across popular sizes. They have either dropped in price or seen a marginal increase in 2022, indicating that prices are levelling off.



Prices for 3" caliper trees in short supply have seen the highest increase of 47% in 2022

Conifers

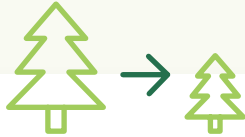
2020 2021 2022



Prices for 4' height conifers in short supply have seen the highest increase of 39% in 2022

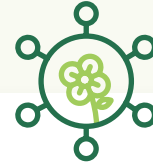


Industry Impact Summary



Shortages Expand from Large to Smaller Sizes

As nurseries and landscapers opt for smaller sizes to compensate for the shortages, the demand for smaller sizes will increase, leading to a possible shortage.



Consolidation & Specialization

Nurseries will focus on partnering and re-wholesaling from other nurseries to fulfill orders.



Demand for Drought-Tolerant Plants & Trees

As major states issue water conservation bylaws, the demand for drought-tolerant plants and trees will increase.



Shrinking Profit Margins

The increasing need to fulfill a single order from multiple suppliers combined with higher plant prices, fuel prices and, trucking costs will impact profitability.


A stylized illustration of a tree with a dark green trunk and branches, and a light green, textured canopy. It is set against a dark green background and sits on a dark green pot.

About the 2022 Plant Shortage Report

Thank you for downloading the 2022 Plant Shortage Report. This exclusive report was compiled using proprietary data, and inputs from the GoMaterials operations team. The data visualizations, and absolute numbers were compiled based on actual estimates and order prices recorded by GoMaterials from 2020 onwards.

As the consumer price index reaches unprecedented levels, and the labor shortages get worse, the horticulture and landscaping industry will be heavily impacted. This is especially relevant following the pre-existing plant shortages from 2021. As an industry, we need to build awareness to keep up with the continuing plant and tree shortages. This report was created as our contribution towards helping the landscaping community track the shortages and make more informed decisions.

We encourage sharing the report with your colleagues and friends to help build awareness about the best way to approach the plant shortages.

A smaller version of the stylized tree illustration from the top left, featuring a dark green trunk and branches, a light green textured canopy, and a dark green pot, set against the dark green background.

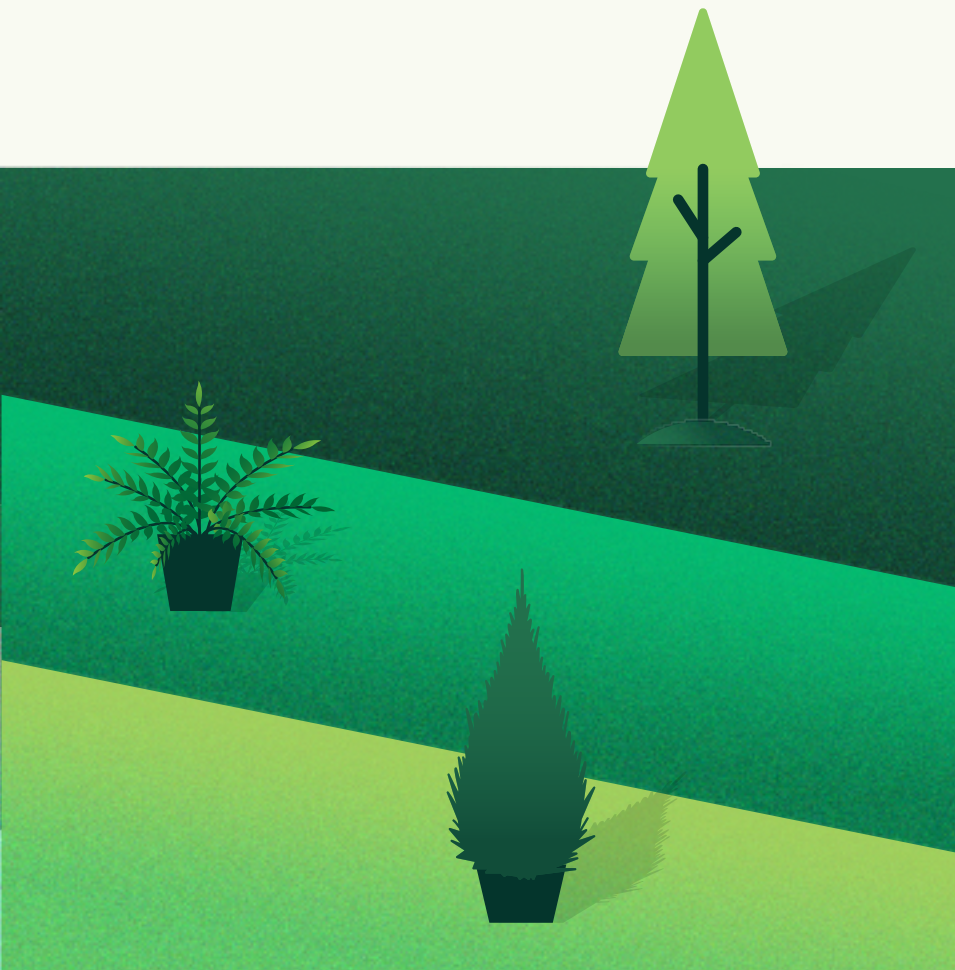
Get Help to Deal With the Plant Shortages in 2022

GoMaterials is currently helping hundreds of landscaping professionals across New York, New Jersey, Florida, Texas, California, Georgia, the Carolinas and Canada beat the plant shortages with our free sourcing service. **Sign-up for our free service to explore how we can help.**

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