

Nursery Survey

2025

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Coverage:

Great Britain

Geographical breakdown:

Scotland

Issued by: Forest Research,
Northern Research Station, Roslin, Midlothian, EH25 9SY

Enquiries: 0300 067 5238
statistics@forestresearch.gov.uk

Website: www.forestresearch.gov.uk/statistics

The Research Agency of the
Forestry Commission

Forest Research is the Research Agency of the Forestry Commission and is the leading UK organisation engaged in forestry and tree related research.

The Agency aims to support and enhance forestry and its role in sustainable development by providing innovative, high quality scientific research, data, technical support and consultancy services.

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Introduction

This publication provides estimates of sales of improved nursery stock by nurseries in Great Britain each planting year (October to September). The data cover sales of Sitka spruce and Scots pine to public and private sector clients in Scotland. Sales of these species in Great Britain are also reported.

The data in this release have been obtained from a voluntary survey of nursery businesses in Great Britain, run on behalf of Scottish Forestry, to monitor the level of improved nursery stock.

“Improved nursery stock” refers to genetically improved Sitka spruce and Scots pine stock raised from seed of seed orchard origin and by vegetative propagation of parent material derived from controlled crosses. These trees are predicted to grow faster and produce better timber than unimproved stock.

Data for the planting year October 2023 to September 2024 are published for the first time in this release. Data for earlier years are unchanged from those previously released. For further details, see [Forest Research’s revisions policy](#). Historical data, showing sales from 2005/06 onwards, can be found in the supplementary spreadsheet.

Figures in tables have been independently rounded, so may not add to the totals shown.

Key findings

- A total of 36.0 million plants (87%) derived from improved nursery stock were sold to Scotland in 2023/24.
- Of all sales in Great Britain in 2023/24, 43.2 million plants (86%) were derived from improved nursery stock, a 19% decrease (equating to 9.9 million plants) compared with the previous year.

Improved nursery stock

Improved nursery stock is defined as follows:

Species	Definition
Sitka spruce: Seedlings	Seed orchard material that falls in the tested category under the UK Forest Reproductive Material Regulations. This material will have superior performance for growth rate and stem form relative to untested material.
Sitka spruce: VP	Vegetatively propagated (VP) tested 'family mixture' material (either half or full sib families). This material is derived from controlled cross-pollination and then multiplied using vegetative propagation. This stock has significant genetic gains for both quality and quantity traits.
Scots pine	Seed orchard material that falls in the tested category under the EU Forest Reproductive Material Regulations. This material will have superior performance for growth rate and stem form relative to untested material.

Sales of nursery stock to Scotland

An estimated total of 41.5 million Sitka spruce and Scots pine plants were sold to Scotland in 2023/24 (Table 1), comprising 33.9 million Sitka spruce plants and 7.5 million Scots pine plants. This represents a 15% decrease in sales of Sitka spruce and a 24% increase in sales of Scots pine from the previous year.

A total of 36.0 million plants (87%) derived from improved nursery stock were sold to Scotland in 2023/24, a 16% decrease compared with 2022/23 (Table 2).

Table 1: Summary table, Scotland, 2023/24

million plants

Plant	Total stock sold in 2023/24	Improved stock sold in 2023/24	Proportion improved (%)
Sitka spruce: Seedlings	31.8	29.3	92.1
Sitka spruce: VP	2.1	2.1	100.0
Sitka spruce: Total	33.9	31.4	92.6
Scots pine: Seedlings	7.5	4.5	59.8
Total	41.5	36.0	86.7

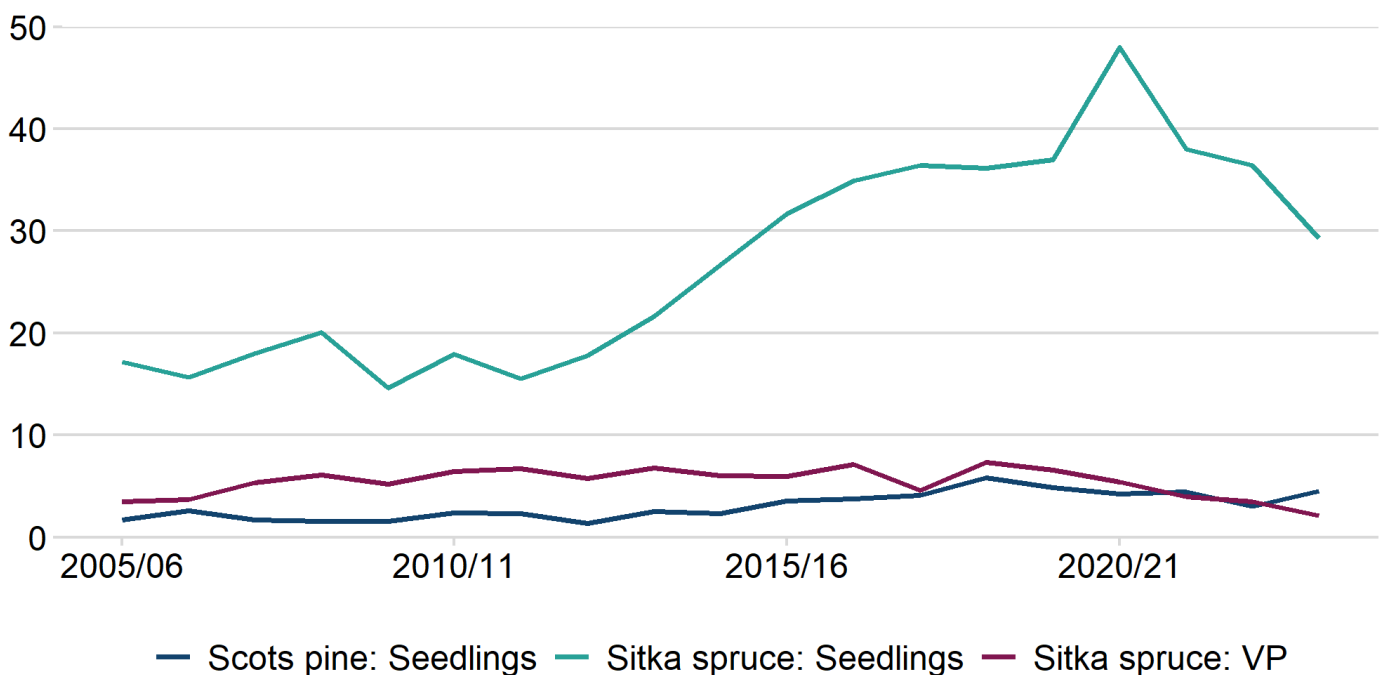
Source: Forest Research

Note:

1. Results for respondents only. See the Data sources and Methodology section.

Figure 1 presents the sales of improved nursery stock to Scotland from 2005/06 to 2023/24 (planting seasons). The chart shows little change in Scots pine seedlings and Sitka spruce VP over time but there was an increase in Sitka spruce seedlings from 2011/12 to 2020/21, and there has been a decline since.

Figure 1: Sales of improved nursery stock, Scotland, 2005/06 to 2023/24
million plants



Source: Forest Research

Note:

1. Results for respondents only. See the Data sources and Methodology section

Table 2: Sales of improved nursery stock, Scotland, 2014/15 to 2023/24

million plants

Planting year	Sitka spruce: seedlings	Sitka spruce: VP	Sitka spruce: Total	Scots pine: Seedlings	Total
2014/15	26.6	6.0	32.7	2.3	35.0
2015/16	31.6	5.9	37.6	3.6	41.2
2016/17	34.9	7.1	42.0	3.8	45.8
2017/18	36.4	4.6	41.0	4.1	45.1
2018/19	36.2	7.3	43.5	5.8	49.3
2019/20	37.0	6.6	43.6	4.9	48.4
2020/21	48.0	5.4	53.4	4.2	57.6
2021/22	38.0	4.0	41.9	4.5	46.4
2022/23	36.5	3.5	40.0	3.0	43.0
2023/24	29.3	2.1	31.4	4.5	36.0

Source: Forest Research

Note:

1. Results for respondents only. See the Data sources and Methodology section.

Sales of nursery stock in Great Britain

An estimated total of 49.9 million Sitka spruce and Scots pine plants were sold in Great Britain in 2023/24 (Table 3), comprising 40.6 million Sitka spruce plants and 9.3 million Scots pine plants. This represents an 18% decrease in sales of Sitka spruce and an 18% increase in sales of Scots pine compared with the previous year.

A total of 43.2 million plants (86%) derived from improved nursery stock were sold in Great Britain in 2023/24, a 19% decrease compared with 2022/23.

Table 3: Summary table, Great Britain, 2023/24

million plants

Plant	Total stock sold in 2023/24	Improved stock sold in 2023/24	Proportion improved (%)
Sitka spruce: Seedlings	37.8	35.3	93.3
Sitka spruce: VP	2.8	2.8	100.0
Sitka spruce: Total	40.6	38.1	93.8
Scots pine: Seedlings	9.3	5.1	54.6
Total	49.9	43.2	86.5

Source: Forest Research

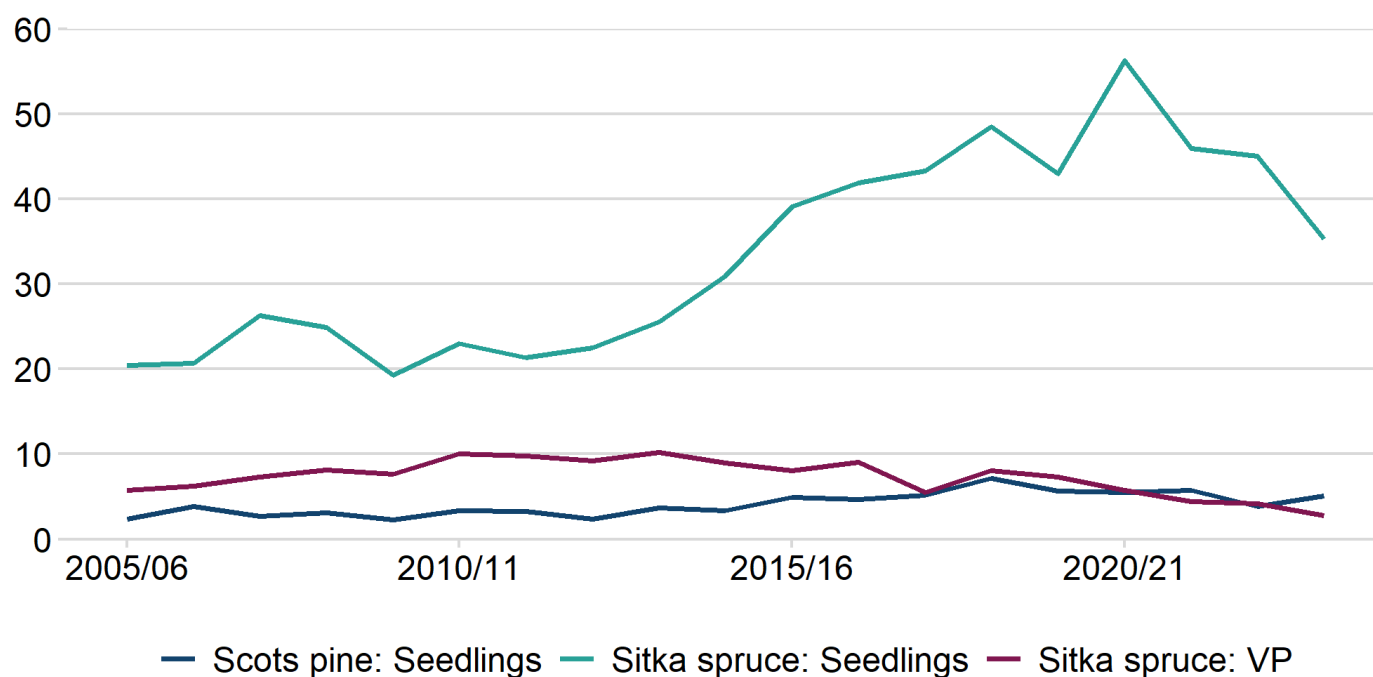
Note:

1. Results for respondents only. See the Data sources and Methodology section

Figure 2 shows the total sales for all improved stock sold in Great Britain, from 2005/06 to 2023/24. Since the 2005/06 planting season, sales of improved Sitka spruce seedlings had more than doubled, however this has been in decline since 2020/21. Sales of improved Sitka spruce VP and improved Scots pine seedlings have both remained relatively constant throughout.

Figure 2: Sales of improved nursery stock, Great Britain, 2005/06 to 2023/24

million plants



Source: Forest Research

Note:

1. Results for respondents only. See the Data sources and Methodology section.

Table 4: Sales of improved nursery stock, Great Britain, 2014/15 to 2023/24

million plants

Planting year	Sitka spruce: seedlings	Sitka spruce: VP	Sitka spruce: Total	Scots pine: Seedlings	Total
2014/15	30.9	8.9	39.9	3.3	43.2
2015/16	39.1	8.1	47.2	4.9	52.1
2016/17	41.9	9.1	51.0	4.7	55.7
2017/18	43.3	5.5	48.7	5.2	53.9
2018/19	48.5	8.0	56.5	7.2	63.7
2019/20	43.0	7.3	50.3	5.7	56.0
2020/21	56.3	5.8	62.1	5.5	67.6
2021/22	45.9	4.5	50.4	5.8	56.2
2022/23	45.1	4.2	49.2	3.9	53.1
2023/24	35.3	2.8	38.1	5.1	43.2

Source: Forest Research

Note:

1. Results for respondents only. See the Data sources and Methodology section.

Annex

Introduction

This annex provides background information on the nursery survey statistics presented in this release. It covers the data sources and methodology used to produce the statistics, information on quality measures and on any revisions to historic data and links to further information.

Glossary

Conifers

Trees with needles and cones, such as spruce, pine and larch.

Great Britain (GB)

England, Scotland and Wales.

Improved nursery stock

Genetically improved Sitka spruce and Scots pine stock raised from seed of seed orchard origin and by vegetative propagation of parent material derived from controlled crosses. Further detailed information is provided on page 6 of this release.

Planting year

Twelve month period running from 1st October to 30th September.

Scots pine

Species of coniferous tree, native to Great Britain.

Seed orchard

Orchard where trees are grown for seed production rather than timber.

Seedling

Young tree grown from seed, prior to being transplanted or planted out in the forest.

Sitka spruce

Species of coniferous tree, not native to Great Britain.

Vegetative propagation (VP)

Reproduction by cuttings, layering or grafting and not involving fertilisation.

Data sources and methodology

The figures in this release have been obtained from a voluntary survey of nursery businesses in Great Britain, run on behalf of Scottish Forestry. The survey was set up to monitor the level of use of improved nursery stock in Scotland annually.

The results relate to respondents only; no estimates have been made for non-respondents to the survey or for businesses not covered by the survey. It is estimated that the respondents have accounted for at least 90% of all sales of Sitka spruce and Scots pine.

Quality

For the 2023/24 survey, questionnaires were issued to a total of 12 nurseries (including one Forestry England and one Forestry and Land Scotland nursery). A total of 11 responses were received, giving a response rate of 92%.

Further information on the quality of our statistics can be found in our [quality report](#).

Revisions

Figures for the planting year 2023/24 are published for the first time in this release.

Our [revisions policy](#) sets out how revisions and errors to Forest Research statistics are dealt with.

Further information

The assistance of the Confederation of Forest Industries (Confor) and the nursery trade in the running of this survey and the provision of data are gratefully acknowledged.

Release schedule

Future release dates to be confirmed.

Official Statistics

This is an Official Statistics publication. For more information about Official Statistics see the [UK Statistics Authority](#).

Alice Holt Lodge	Northern Research Station	Forest Research in Wales
Farnham	Roslin	Talybont Research Office
Surrey, GU10 4LH, UK	Midlothian, EH25 9SY, UK	Talybont-on-Usk Brecon
		Powys, LD3 7YN, UK
Tel: 0300 067 5600	Tel: 0300 067 5600	Tel: 0300 067 5774

info@forestresearch.gov.uk

www.forestresearch.gov.uk

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