

Nursery Survey

2026

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Coverage:

Great Britain

Geographical breakdown:

Scotland

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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 2024 to September 2025 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

- Of all sales to Scotland in 2024/25, 38.5 million plants (90%) were derived from improved nursery stock, a 7% increase (equating to 2.5 million plants) compared with the previous year.
- Of all sales in Great Britain in 2024/25, 47.1 million plants (89%) were derived from improved nursery stock, a 9% increase (equating to 3.9 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 UK Forest Reproductive Material Regulations. This material will have superior performance for growth rate and stem form relative to untested material.

1. Sales of nursery stock to Scotland

An estimated total of 42.7 million Sitka spruce and Scots pine plants were sold to Scotland in 2024/25 (Table 1), comprising 35.2 million Sitka spruce plants and 7.5 million Scots pine plants. This represents a 4% increase in sales of Sitka spruce and a 1% decrease in sales of Scots pine from the previous year (Table 2).

A total of 38.5 million plants (90%) derived from improved nursery stock were sold to Scotland in 2024/25, a 7% increase compared with 2023/24.

Table 1 Summary table, Scotland, 2024/25

million plants

Plant	Total stock sold in 2024/25	Improved stock sold in 2024/25	Percentage improved (%)
Sitka spruce: Seedlings	32.1	31.9	99.3
Sitka spruce: VP	3.1	3.1	100.0
Sitka spruce: Total	35.2	35.0	99.4
Scots pine: Seedlings	7.5	3.5	46.8
Total	42.7	38.5	90.2

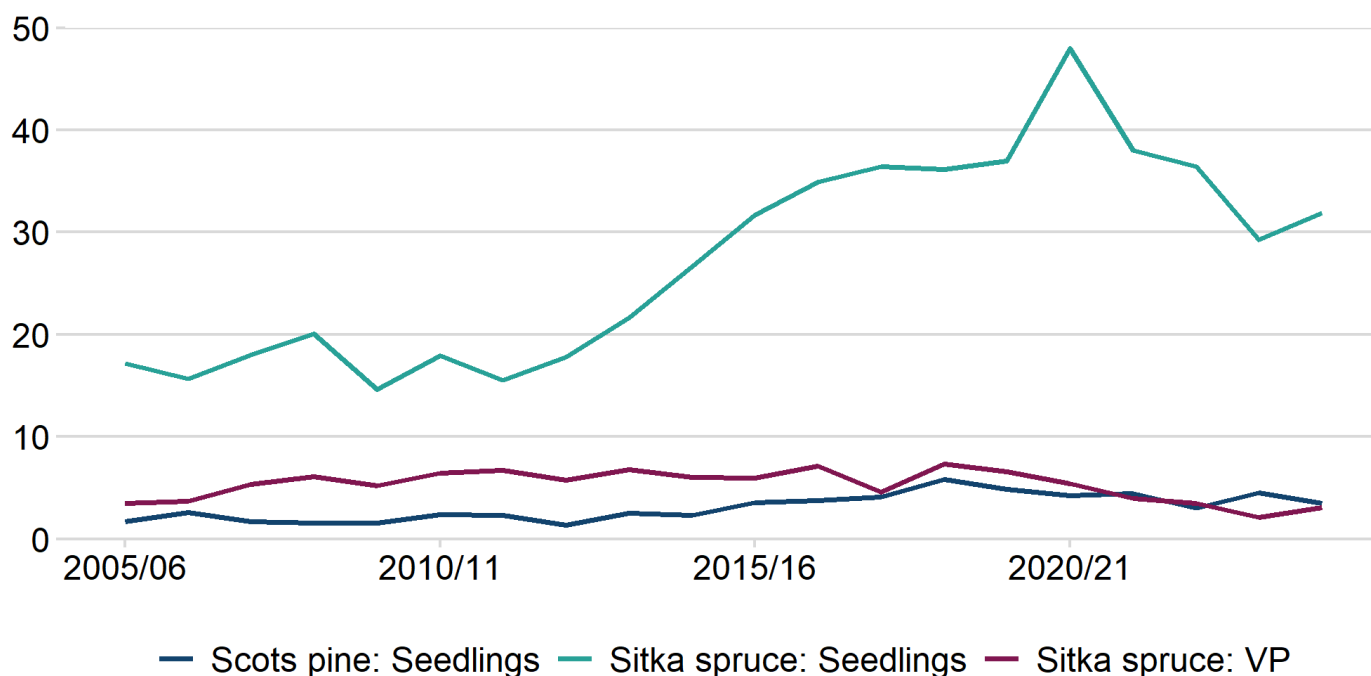
Source: Forest Research

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 2024/25 (planting seasons). The chart shows little change in Scots pine seedlings and Sitka spruce VP over time. Sales of Sitka spruce seedlings increased from 2011/12 to a peak in 2020/21 and declined in subsequent years, before rising again in 2024/25.

Figure 1 Sales of improved nursery stock, Scotland, 2005/06 to 2024/25
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, 2015/16 to 2024/25

million plants

Planting year	Sitka spruce: seedlings	Sitka spruce: VP	Sitka spruce: Total	Scots pine: Seedlings	Total
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
2024/25	31.9	3.1	35.0	3.5	38.5

Source: Forest Research

Note:

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

2. Sales of nursery stock in Great Britain

An estimated total of 53.0 million Sitka spruce and Scots pine plants were sold in Great Britain in 2024/25 (Table 3), comprising 43.4 million Sitka spruce plants and 9.7 million Scots pine plants. This represents a 7% increase in sales of Sitka spruce and a 4% increase in sales of Scots pine compared with the previous year (Table 4).

A total of 47.1 million plants (89%) derived from improved nursery stock were sold in Great Britain in 2024/25, a 9% increase compared with 2023/24.

Table 3 Summary table, Great Britain, 2024/25

million plants

Plant	Total stock sold in 2024/25	Improved stock sold in 2024/25	Percentage improved (%)
Sitka spruce: Seedlings	39.9	39.7	99.4
Sitka spruce: VP	3.5	3.5	100.0
Sitka spruce: Total	43.4	43.1	99.5
Scots pine: Seedlings	9.7	3.9	40.6
Total	53.0	47.1	88.7

Source: Forest Research

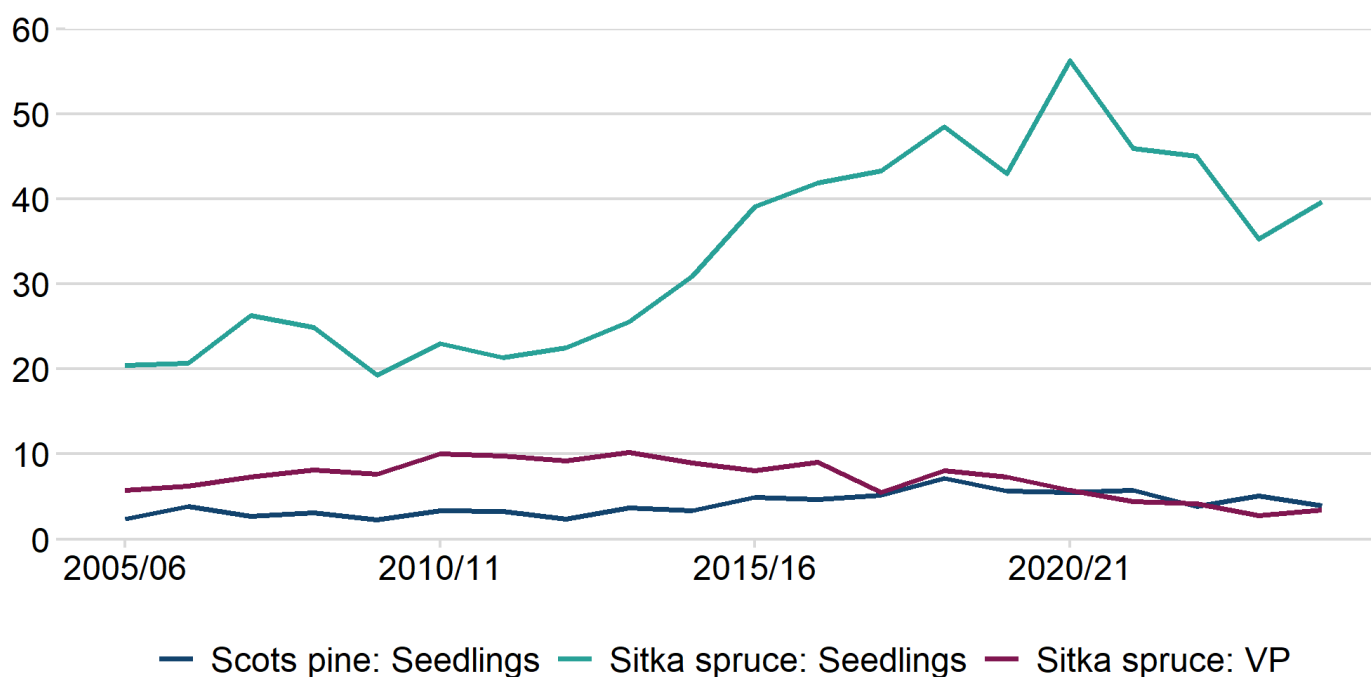
Note:

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 2024/25. Since the 2005/06 planting season, sales of improved Sitka spruce seedlings have more than doubled, peaking in 2020/21 and broadly declining since, though 2024/25 saw an increase. 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 2024/25

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, 2015/16 to 2024/25

million plants

Planting year	Sitka spruce: seedlings	Sitka spruce: VP	Sitka spruce: Total	Scots pine: Seedlings	Total
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
2024/25	39.7	3.5	43.1	3.9	47.1

Source: Forest Research

Note:

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

3. Annex

3.1 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.

3.2 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 accounted for at least 95% of sales of Sitka spruce and Scots pine by nurseries in the survey.

3.3 Quality

For the 2024/25 survey, questionnaires were issued to a total of 12 nurseries. 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](#).

3.4 Revisions

Figures for the planting year 2024/25 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.

3.5 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.

3.6 Release schedule

Nursery Survey 2027 will be published on 16 September 2027.

3.7 Glossary

See [Glossary - Forest Research](#) for a glossary of terms.

3.8 Official Statistics

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

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