



2024

STATE OF THE HYDRANGEA MARKET

SPONSORED BY

BAILEY
GROWING WHAT'S NEXT

We are excited to partner with *Nursery Management* to bring you the latest updates in the world of hydrangeas. The hydrangea category has become one of the most innovative in the ornamental plant market today. Keeping pace with this rapidly evolving category can be challenging, as breeders continually introduce new products, sometimes faster than the market can accommodate. At Bailey, we see it as our responsibility as breeders, growers and the brand owner of Endless Summer® Hydrangeas and First Editions® Shrubs & Trees to address this challenge through responsible brand management, ensuring that only the most robust innovations reach the market.

Our introduction philosophy is straightforward: only the best makes it. This principle maintains our new plant program's high standard. As growers, we understand the limitations of space for new products. Adding a new product often means removing another. Ideally, this is seen as an opportunity to enhance your product mix with the next generation of high-performing plants.

But how do you ensure you're adding the best? It takes time and dedication to identify truly unique traits. At Bailey Innovations™, our breeding efforts focus on characteristics that serve as high-performing differentiators, such as new sepal or foliage colors, intriguing flower patterns and compactness. Plants are evaluated over the years to ensure these traits hold true.

As selections advance, trialing becomes increasingly important. Field and production trials occur at Bailey Innovations™ in Georgia and across all Bailey sites in Minnesota, Illinois and Oregon. We also collaborate with global partners to gather external regional performance data. This approach provides us with valuable insights into how each selection responds to different climatic, production and in-ground conditions. We approach all of this from both a breeder's perspective and as growers committed to delivering consistent, quality plants to the market.



**Visit our website
to learn more
about FlowerFull™
and other exciting
ornamental plant
advancements.**



BAILEY
GROWING WHAT'S NEXT®

The market has changed significantly since the introduction of Endless Summer® The Original 20 years ago, which is incredibly exciting! Pop Star®, the brand's newest introduction, exemplifies this breeding evolution with its exceptional flower power, heat tolerance, compactness and versatility.

First Editions® Eclipse® Bigleaf Hydrangea and Little Hottie® Panicle Hydrangea also stand out for unique reasons. Eclipse® showcases its stunning dark leaves that stay dark all season, while Little Hottie® exemplifies a plant that checks all the boxes for end-users, offering abundant blooms on a compact plant, perfect for gardens and mass plantings.

In cool climates across North America, *Hydrangea arborescens* has been a landscape staple. However, once those big blooms appear, they often droop with rainfall or wind. This is where breeding provides solutions to what some consider unsightly or disappointing issues. In 2025, First Editions® proudly introduces FlowerFull™ Smooth Hydrangea, with strong stems to hold the blooms tall and boasting more than double the flowers of standard varieties. It promises to delight landscapes, retailers and growers for decades to come.

ALEC CHARAIS

Chief Marketing & Product
Development Officer



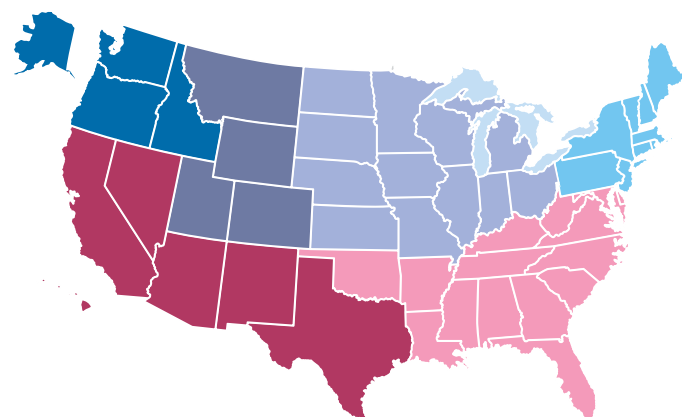
Hydrangea arborescens
Invincible Lace

STATE OF THE HYDRANGEA

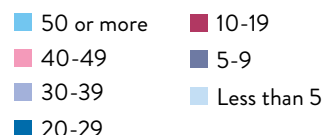
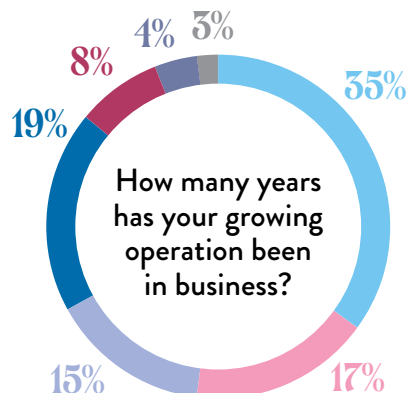
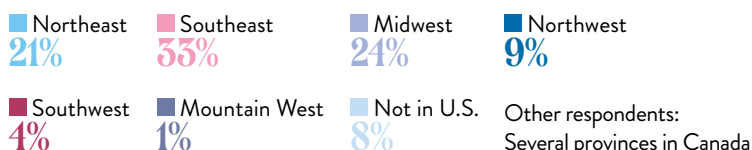
Find out what your peers think about this top-selling nursery crop.

FROM OAKLEAF TO MOPHEAD, there are many types of hydrangea. Our survey aims to bring you the best information about the market for this major nursery crop.

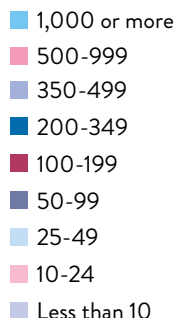
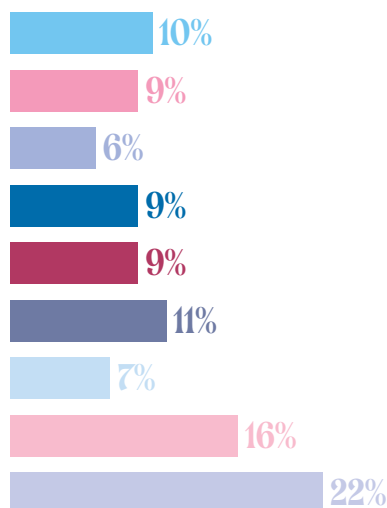
For our first State of the Hydrangea Report, we surveyed 240 nursery growers about their hydrangea production. Thank you to all who participated.



Where in the U.S. is your main growing operation located?



How many acres do you have in production in 2024?



SALES BY TYPE

To date, which type of hydrangea has produced the highest sales volume for your nursery in 2024?

43%

*Hydrangea
paniculata*

40%

*Hydrangea
macrophylla*

9%

*Hydrangea
quercifolia*

5%

*Hydrangea
arborescens*

0%

*Hydrangea
serrata*

0%

*Hydrangea
petiolaris*

4%

Other
(please specify)

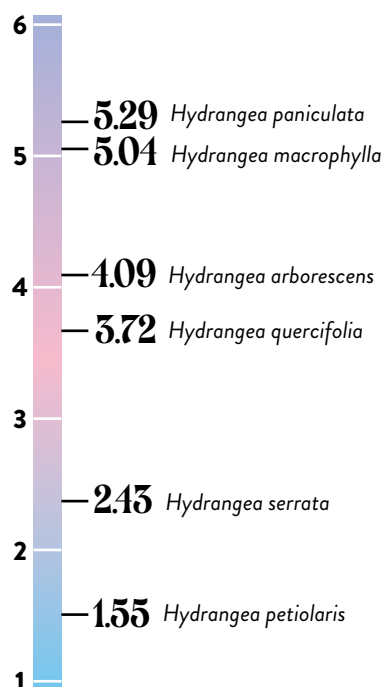
Other answers included: Tie between
H. macrophylla and *H. paniculata*,
tree form paniculata

◀ *Hydrangea paniculata*
'White Wedding'

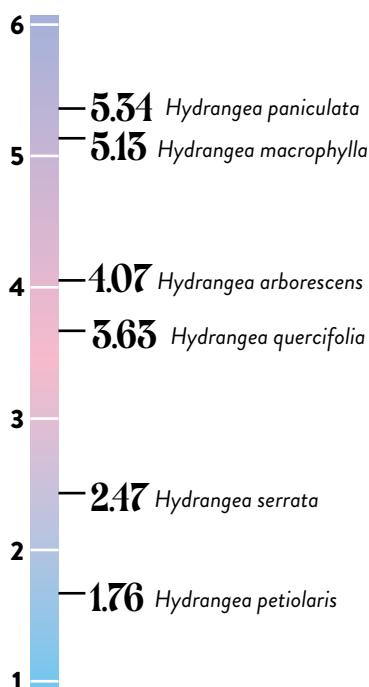
Hydrangea macrophylla
Seaside Serenade
Newport



Please rank these hydrangea types by
2024 sales volume at your nursery.



Please rank these hydrangea types by
2024 production volume at your nursery.



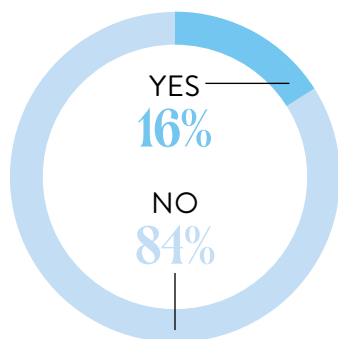
*Hydrangea
macrophylla*
Pop Star



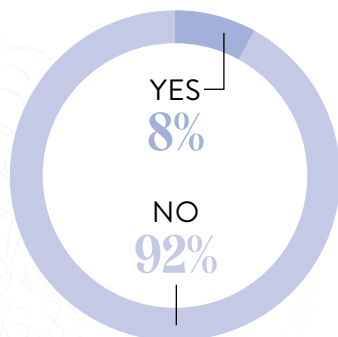
Methodology: choices were ranked, weighed and assigned a score. The higher the score, the more high-ranking votes for that option.

SUPPLY ISSUES

Did you experience a shortage
of hydrangea in 2024?



Do you anticipate hydrangea
shortages in 2025?



COMMENTS FROM THE “YES” CROWD:

- “We expect to sell out of at least *Hydrangea quercifolia*.”
- “Newer varieties are **always the most popular** and will sell out.”
- “Mainly in *H. quercifolia* and *H. arborescens*.”

“NEVER ENOUGH
ANNABELLE.”

“WE
SOLD
OUT
OF BOTH
HYDRANGEA
QUERCIFOLIA
AND
HYDRANGEA
ARBORESCENS.”

“MIDWEST
EXTREMELY WET
SPRING AND
EARLY SUMMER
CAUSING
**MULTIPLE
FUNGAL
DISEASES
ACROSS ALL
HYDRANGEA.**”

“SOLD OUT OF
ENDLESS SUMMER”

“WE SELL OUT
OF **HYDRANGEA
ARB. ‘HAAS HALO’**
EVERY YEAR SINCE
WE STARTED
CARRYING IT.”

“**SNOWFLAKE
WERE DIFFICULT,
IF NOT
IMPOSSIBLE,
TO GET.**”

“MOST VARIETIES
SOLD VERY WELL,

NO MAJOR SURPLUSES, BUT NO MAJOR
SHORTAGES. EQUILIBRIUM THIS YEAR.”

*Survey participants (anonymous) wrote in comments
to questions about supply issues.*

FLOWERFULL™

SMOOTH HYDRANGEA

Hydrangea arborescens 'BAiful' PP35,613 CPBRAf



SCAN TO
LEARN MORE



NEW FOR
2025

**STRONG STEMS THAT DON'T FLOP
DISEASE-RESISTANT, LUSH FOLIAGE
BIGGER, BOLDER, MORE ABUNDANT BLOOMS**

GROWERS:

- LESS INPUTS NEEDED FOR A HEALTHY CROP
- BLOOMS IN THE FIRST YEAR IN PRODUCTION
- DISEASE-RESISTANT FOLIAGE THAT STAYS CLEAN LATE IN THE SEASON



RETAILERS:

- BLOOMS AND LEAVES STAY FRESH THROUGHOUT THE SEASON
- LOW-MAINTENANCE, IMPULSE ITEM
- THE STRONG STEMS HOLD THE BLOOMS TALL ALL SEASON



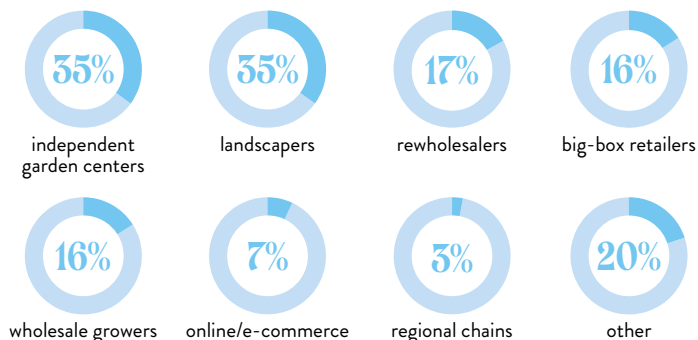
LANDSCAPERS:

- PRODUCES 2-3X MORE BLOOMS PER SEASON THAN OTHER *HYDRANGEA ARBORESCENS*
- DOESN'T FLOP, EVEN WITH WIND OR RAIN
- LESS ONGOING MAINTENANCE NEEDED

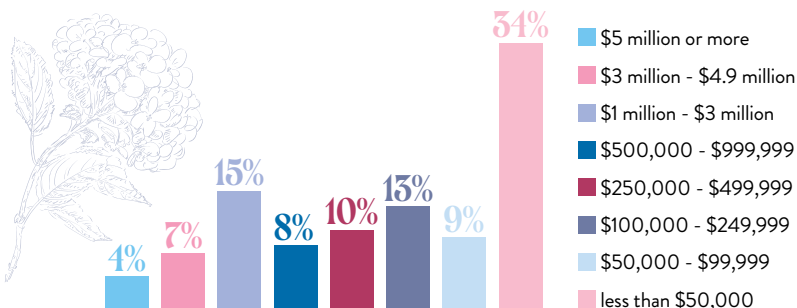


THE BUYERS

What percentage of your nursery's 2024 hydrangea sales was to each of the following customer types?



What do you anticipate your nursery's approximate 2024 gross hydrangea sales to be?



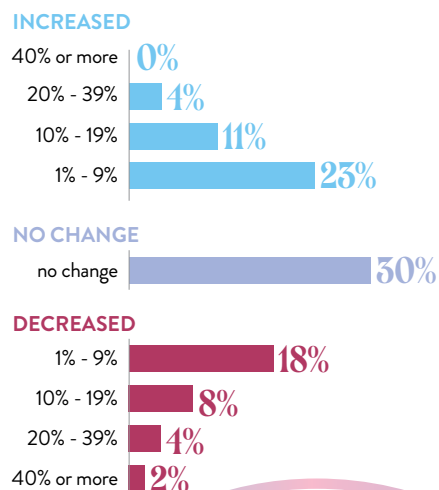
By what percentage has your nursery raised its hydrangea prices in 2024 compared with 2023?

20% or more	1%
10% - 19%	11%
5% - 9%	28%
1% - 4%	48%
none — did not raise prices in 2024	11%

By what percentage does your nursery plan to raise its prices in 2025 compared with 2024?

20% or more	0%
10% - 19%	2%
5% - 9%	17%
1% - 4%	48%
none — do not plan to raise prices in 2025	33%

How has the dollar amount of your nursery's anticipated 2024 gross hydrangea sales changed compared with 2023?



Do you anticipate your nursery's hydrangea sales to increase, decrease or remain about the same in 2025 compared with 2024?





◀ *Hydrangea macrophylla*
Let's Dance Lovable

56%
stem sturdiness

56%
reblooming

What areas should plant breeders focus on for new hydrangea genetics?

44%
disease resistance

36%
new colors

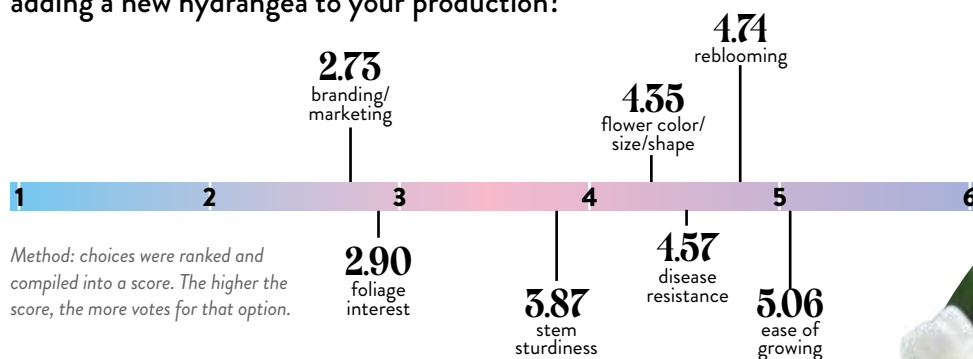
27%
other (please specify)

20%
foliage interest

19%
flower shape/size

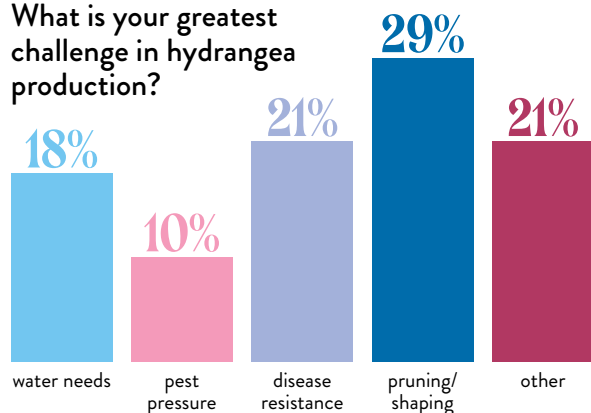
Other answers included flea beetle resistance, smaller size, cold hardiness for flowering, flower longevity, taller tree form, true blue mophead Serrata, bigleaf that can withstand the Southeastern climate, as well as "Don't - the market is flooded with too many options already!"

What features would make you consider adding a new hydrangea to your production?



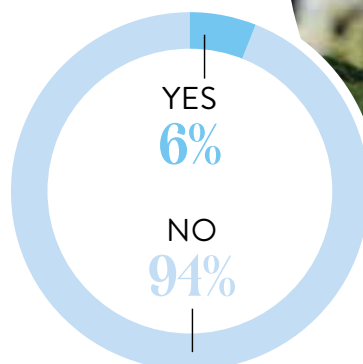
Hydrangea macrophylla
Seaside Serenade
'Glacier Bay'

What is your greatest challenge in hydrangea production?



Other answers included too many varieties, keeping up with demand, consistent blue color, propagation, oversupply on the market, lack of herbicides and weather.

Does your nursery grow hydrangea for the floral/gift market?



RAINBOW OF CHOICES

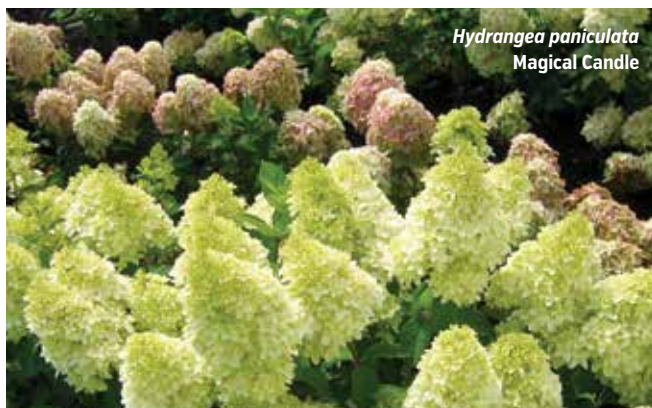
Knowing your hydrangea is the key to growing it well.



◀ *Hydrangea arborescens*
FlowerFull

Hydrangea arborescens

- Commonly known as smooth hydrangea or 'Annabelle' hydrangea after a particularly popular cultivar
- Blooms on new wood
- After landscape establishment, gardeners can cut this type back to about 1 ft. from the ground every winter/early spring.
- New branches will produce buds and bear flower heads all in the same season
- White, pink or green flowers, usually globe-shaped



Hydrangea paniculata
Magical Candle

Hydrangea paniculata

- Originated in the Asian mountains in high elevations
- Very cold hardy from Zones 3 to 8 and prefers full sun, especially in northern climates
- Most drought tolerant of the species
- Typically strong growers, 5 to 10 feet height and width in bush form; great specimen plants as standards (tree form)
- Very long-lived; some plants are 100 years old
- Flowers on new wood (buds form in the spring)
- Bloom color unaffected by soil pH
- Panicle blooms feature clusters of flowers on a branch and typically open white with maturing shades of lime green to pink to mauve from mid-summer to mid-fall.



Hydrangea macrophylla
Summer Crush

Hydrangea macrophylla

- A species that originated in coastal regions of Japan; they do well in the Cape Cod maritime climate.
- Colors range from white to pink, blue or purple flowers, depending on the soil's acidity. Blue flowers develop with acidic soil (a pH of 5.0 to 5.5) and pink flowers from alkaline soil pH (6.0 to 6.5). Aluminum sulfate can be added to acidify the soil, and lime to produce a more alkaline soil.
- Full sun to part shade
- Also known as florist's, hortensia, mophead or lacecap
- Blooms on old wood
- Could benefit from winter protection, especially on spring evenings where frost threatens



Hydrangea petiolaris

- Climbing hydrangea is the newest addition to the hydrangea family.
- Formerly *Schizophragma hydrangeoides*
- White disc-shaped flowers; stems need support of a tree or structure to climb
- Blooms on old wood
- Prefers part shade

◀ *Hydrangea petiolaris*



▲ *Hydrangea serrata* Tuff Stuff Top Fun

Hydrangea serrata

- Commonly known as mountain hydrangea
- A hardy species of Asian mountain origin growing in the forest understory.
- Cold hardy from Zones 5 to 8, prefers shadier locations — at least a half-day of shade; prone to leaf spotting in high sun locations
- Hybridizes well with *H. macrophylla*; often utilized in newer rebloomers
- Upright bush of rounded habit, 2 to 6 feet height and width
- Mostly delicate lace cap flowers with only a few mophead choices; lace caps feature a set of smaller inner fertile blooms and larger colorful outer petals
- Blooms early in summer on old wood (buds form in the fall) with slightly subdued bloom color range: whites, pale greens, pinks, blues and some reds depending on soil pH and cultivar

Hydrangea quercifolia

- Commonly known as oakleaf hydrangea
- White conical flowers and large, oak-shaped leaves
- Depending on the variety, the oak-like leaves can grow up to 12 inches wide.
- The cone-shaped flower clusters combine large, showy florets with small, budlike flowers.
- Blooms on old wood
- Full sun/part shade
- Rarely needs winter protection
- Unlike mophead hydrangeas, soil pH doesn't affect the color of oakleaf blooms.



Hydrangea quercifolia
Toy Soldier

KNOW IT AND GROW IT

Here are some general growing tips that apply to all types of hydrangea.

- They prefer moist but well-drained soil. Do not leave them in areas prone to flooding.
- They tolerate a wide range of pH levels, from acidic to slightly alkaline.
- They grow best with some sun each day, ideally four hours of morning sun.
- They need plenty of water, especially in early stages of growth and establishment. They tend to dry out easily due to their shallow root systems.
- A 2-to 3-inch layer of shredded bark mulch will help with irrigation efforts.



IT'S ALL IN THE GENES

BIG REBLOOMER • COMPACT
VERSATILE • EASY TO GROW



Pop Star® Bigleaf Hydrangea
Pop Star® is a reblooming lacecap that is compact and incredibly floriferous, allowing this shrub to stand out on the sales floor, in the landscape, and in decorative pots.

BAILEYNURSERIES.COM/ENDLESS-SUMMER