



TONNAGE SURVEYS OF SELECT BOTANICALS PRODUCED IN NORTH AMERICA

2024–2025

Prepared for AHPA and its members by:
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Chamomile
(*Matricaria chamomilla*)



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Introduction

The American Herbal Products Association (AHPA) conducts quantitative surveys to estimate annual harvests of certain native North American herbs in commerce, as well as to quantify production of additional herbs not native to North America but known to be commercially cultivated in the U.S.; survey data representing harvests from 2024 to 2025 are reported here. Plant species for the survey were initially selected for inclusion in the surveys based on their use in herbal products and their status as wild harvested commodities for at least some part of their market. In 2021–2023, the survey was expanded to include additional botanical species that are predominantly non-North American native herbs known to be commercially cultivated in the U.S.

AHPA previously collected and published annual tonnage data^{1,2,3,4,5,6,7,8} beginning with a survey of wild and cultivated harvest quantities of goldenseal (*Hydrastis canadensis*) and several other plants in 1997. The survey was expanded in 2000, and the format continues to evolve with incorporation of additional species and other elements. Results and analysis of surveys for harvest years 1997 through 2023 are available in previous publications, though this report includes discussion of some of those data for context.

Data reported here represent aggregate harvest quantities for specific commodities; data were provided to AHPA by primary producers, collectors, aggregators, distributors, and suppliers of botanical raw materials. For each of the commodities included in this report, respondents were asked to provide information on the amounts of both cultivated and wild-harvested material as dried (i.e., dehydrated) weight. Additionally, respondents were asked to report quantities of each commodity that were certified organic in conformity with the USDA National Organic Program. Reported amounts of certified organic materials are included in the total aggregate harvest data for wild and cultivated categories as well as in a separate organic raw materials table (**Table 2** and **Table 3**). Finally, AHPA began collecting harvest data for botanical materials produced using forest farming techniques starting in 2018 (**Table 4**).

¹ American Herbal Products Association. *1998 Goldenseal Survey Results*. Silver Spring, MD: AHPA; 1999.

² American Herbal Products Association. *1999 Tonnage Survey Report*. Silver Spring, MD: AHPA; 2000.

³ American Herbal Products Association. *Tonnage Survey of North American Wild-harvested Plants, 2000-2001*. Silver Spring, MD: AHPA; 2003.

⁴ American Herbal Products Association. *Tonnage Survey of Select North American Wild-harvested Plants, 2002- 2003*. Silver Spring, MD: AHPA; 2006.

⁵ American Herbal Products Association. *Tonnage Survey of Select North American Wild-harvested Plants, 2004- 2005*. Silver Spring, MD: AHPA; 2007.

⁶ American Herbal Products Association. *Tonnage Surveys of Select North American Wild-Harvested Plants, 2006–2010*. Silver Spring (MD): American Herbal Products Association; 2012.

⁷ American Herbal Products Association. *Tonnage Surveys of Select North American Wild-Harvested Plants, 2011–2017*. Silver Spring (MD): American Herbal Products Association; 2019.

⁸ American Herbal Products Association. *Tonnage Surveys of Select North American Wild-Harvested Plants, 2018–2023*. Silver Spring (MD): American Herbal Products Association; 2024.

Harvest data were presented for 56 botanical commodities, representing 48 different North American plant species up through 2020. In 2021, the survey was expanded to include 64 additional botanical species that are predominantly non-North American native herbs known to be commercially cultivated in the U.S. for a total of 126 botanical commodities, representing 113 different plant species. All species surveyed from 2021 onward are identified in Table 1: List of Surveyed Commodities and **Table 2: Aggregate Harvest of Commodities**. Information was solicited for one or more commodities for each of the following species (parts of plants separated by commas are surveyed as separate commodities):

Table 1: List of Surveyed Commodities

	Common name	Latin binomial	Parts of plant
1	alfalfa	<i>Medicago sativa</i>	aerial parts
2	aletris	<i>Aletris farinosa</i>	root
3	angelica	<i>Angelica archangelica</i>	root
4	arnica	<i>Arnica</i> spp.	any/all parts
5	artichoke	<i>Cynara cardunculus</i> var. <i>scolymus</i>	leaf
6	American ginseng	<i>Panax quinquefolius</i>	root, leaf
7	American wild ginger	<i>Asarum canadense</i>	root
8	astragalus	<i>Astragalus membranaceus</i>	root
9	ashwagandha	<i>Withania somnifera</i>	root, aerial parts
10	barbasco	<i>Dioscorea composita</i>	root
11	wild bergamot beebalm	<i>Monarda fistulosa</i>	aerial parts
12	bethroot	<i>Trillium erectum</i>	root
13	black chokeberry	<i>Aronia melanocarpa</i>	fruit
14	black cherry	<i>Prunus serotina</i>	bark
15	black cohosh	<i>Actaea racemosa</i>	root and rhizome
16	blessed thistle	<i>Centaurea benedicta</i>	whole plant
17	black walnut	<i>Juglans nigra</i>	hull
18	bloodroot	<i>Sanguinaria canadensis</i>	root
19	blue cohosh	<i>Caulophyllum thalictroides</i>	root

20	blue flag	<i>Iris virginica</i>	root
21	blue vervain	<i>Verbena hastata</i>	aerial parts
22	boneset	<i>Eupatorium perfoliatum</i>	aerial parts
23	borage	<i>Borago officinalis</i>	aerial parts
24	bugleweed (American)	<i>Lycopus americanus</i>	aerial parts
25	bugleweed (European)	<i>Lycopus europaeus</i>	aerial parts
26	bugleweed	<i>Lycopus virginicus</i>	aerial parts
27	burdock	<i>Arctium lappa</i>	root
28	butterfly weed	<i>Asclepias tuberosa</i>	root
29	calendula	<i>Calendula officinalis</i>	flower
30	California poppy	<i>Eschscholzia californica</i>	aerial parts
31	cascara sagrada	<i>Frangula purshiana</i>	bark
32	catnip	<i>Nepeta cataria</i>	aerial parts
33	cayenne	<i>Capsicum annuum</i> L. var. <i>annuum</i>	fruit
34	celandine	<i>Chelidonium majus</i>	whole plant
35	chaga	<i>Inonotus obliquus</i>	whole canker
36	chamomile	<i>Matricaria chamomilla</i>	flower
37	chaparral	<i>Larrea tridentata</i>	leaf
38	chaste tree	<i>Vitex agnus-castus</i>	fruit
39	chickweed	<i>Stellaria media</i>	aerial parts
40	chokecherry	<i>Prunus virginiana</i>	fruit
41	comfrey	<i>Symphytum officinale</i>	root, aerial parts
42	corn silk	<i>Zea mays</i>	silk
43	Culver's root	<i>Veronicastrum virginicum</i>	root
44	damiana	<i>Turnera diffusa</i>	leaf
45	dandelion	<i>Taraxacum officinale</i>	root, leaf

46	Echinacea angustifolia	<i>Echinacea angustifolia</i>	root, aerial parts
47	Echinacea pallida	<i>Echinacea pallida</i>	root, aerial parts
48	Echinacea purpurea	<i>Echinacea purpurea</i>	root, aerial parts
49	eclipta	<i>Eclipta prostrata</i>	aerial parts
50	elecampane	<i>Inula helenium</i>	root
51	elderberry	<i>Sambucus nigra</i>	berry, flower
52	false unicorn	<i>Chamaelirium luteum</i>	root
53	feverfew	<i>Tanacetum parthenium</i>	aerial parts
54	ginkgo	<i>Ginkgo biloba</i>	leaf
55	goldenseal	<i>Hydrastis canadensis</i>	root, aerial parts
56	hawthorn species	<i>Crataegus</i> spp.	fruit
57	holy basil	<i>Ocimum tenuiflorum</i>	aerial parts
58	hops	<i>Humulus lupulus</i>	flower
59	horehound	<i>Marrubium vulgare</i>	aerial parts
60	hydrangea	<i>Hydrangea arborescens</i>	root
61	lady's slipper	<i>Cypripedium</i> spp.	root
62	hyssop	<i>Hyssopus officinalis</i>	aerial parts
63	lomatium	<i>Lomatium dissectum</i>	root
64	lavender	<i>Lavandula angustifolia</i>	flower
65	lemon balm	<i>Melissa officinalis</i>	aerial parts
66	lobelia	<i>Lobelia inflata</i>	aerial parts
67	meadowsweet	<i>Filipendula ulmaria</i>	aerial parts
68	motherwort	<i>Leonurus cardiaca</i>	aerial parts
69	mountain maple	<i>Acer spicatum</i>	bark
70	mugwort	<i>Artemisia vulgaris</i>	aerial parts
71	mullein	<i>Verbascum thapsus</i>	root, leaf

72	nettle	<i>Urtica dioica</i>	leaf
73	oat	<i>Avena sativa</i>	immature grain
74	oregano	<i>Origanum vulgare</i>	aerial parts
75	Oregon grape	<i>Berberis aquifolium</i>	root
76	osha	<i>Ligusticum porteri</i>	root
77	partridge berry	<i>Mitchella repens</i>	herb
78	passionflower	<i>Passiflora incarnata</i>	aerial parts
79	peppermint	<i>Mentha × piperita</i>	aerial parts
80	pipsissewa	<i>Chimaphila umbellata</i>	aerial parts
81	plantain	<i>Plantago major</i>	leaf
82	poke	<i>Phytolacca americana</i>	root
83	pulsatilla	<i>Pulsatilla vulgaris</i>	aerial parts
84	red clover	<i>Trifolium pratense</i>	aerial parts
85	rosemary	<i>Rosmarinus officinalis</i>	aerial parts
86	rue	<i>Ruta graveolens</i>	aerial parts
87	sage	<i>Salvia officinalis</i>	aerial parts
88	sarsaparilla	<i>Smilax</i> spp.	rhizome
89	saw palmetto	<i>Serenoa repens</i>	fruit
90	skullcap	<i>Scutellaria lateriflora</i>	aerial parts
91	slippery elm	<i>Ulmus rubra</i>	bark
92	Solomon's seal	<i>Polygonatum biflorum</i>	root
93	spearmint	<i>Mentha spicata</i>	aerial parts
94	spilanthes	<i>Acmella oleracea</i>	aerial parts
95	St. John's wort	<i>Hypericum perforatum</i>	flowering
96	stone root	<i>Collinsonia canadensis</i>	root
97	sundew	<i>Drosera</i> spp.	aerial parts

98	sweet wormwood	<i>Artemisia annua</i>	aerial parts
99	thyme	<i>Thymus vulgaris</i>	aerial parts
100	usnea	<i>Usnea</i> spp.	lichen
101	valerian	<i>Valeriana officinalis</i>	root
102	Venus flytrap	<i>Dionaea muscipula</i>	whole plant
103	violet	<i>Viola tricolor</i>	aerial parts
104	Virginia snakeroot	<i>Aristolochia serpentaria</i>	root
105	wild yam	<i>Dioscorea villosa</i>	root
106	witch hazel	<i>Hamamelis virginiana</i>	bark, twigs, leaf
107	white sage	<i>Salvia apiana</i>	aerial parts
108	wood betony	<i>Stachys officinalis</i>	leaf
109	wormwood	<i>Artemisia absinthium</i>	aerial parts
110	yarrow	<i>Achillea millefolium</i>	leaf and flower
111	yellow dock	<i>Rumex crispus</i>	root
112	yerba mansa	<i>Anemopsis californica</i>	root
113	yerba santa	<i>Eriodictyon</i> spp.	leaf

Harvest data for more than one commodity were collected for eleven species. For arnica (*Arnica* spp.), data are included for any/all plant parts. Data for goldenseal (*Hydrastis canadensis*), and three species of Echinacea (*Echinacea angustifolia*, *Echinacea pallida*, and *Echinacea purpurea*) are provided for both the root and aerial parts, defined for the purposes of this survey as all above-ground parts of the plant. Elderberry (*Sambucus nigra*) data are provided for flower and berry, and data for witch hazel (*Hamamelis virginiana*) are provided for bark, dormant twigs, and leaf. From 2021 onward, harvest data for ashwagandha (*Withania somnifera*) and comfrey (*Symphytum officinale*) are provided for root and aerial parts, and data collected for mullein (*Verbascum thapsus*) includes root and leaf. American ginseng (*Panax quinquefolius*) was surveyed for root and leaf for all survey years, and for the first time since 1999, the cultivated tonnage of American ginseng root is presented in this report. Previously AHPA did not include any data for American ginseng because more complete harvest data has been collected for the species by the U.S. Fish and Wildlife Service. For the current report, AHPA Tonnage Survey data are provided for **cultivated** quantities of American ginseng root. For the purposes of comparison, U.S. Fish and Wildlife data have also been included for **wild**-harvested quantities of this commodity. Note that AHPA Tonnage Survey data is provided for cultivated American ginseng quantities ONLY, and all wild quantities are derived from U.S. Fish and Wildlife. Data for saw palmetto are not presented in Tables 2 or 3. This is due to differences in data collection methods for this commodity. A revised approach to

data collection included soliciting whole-industry production estimates from primary producers and aggregators and this information is presented in Other High Volume Plant Material: Saw Palmetto.

The survey includes questions regarding quantities of USDA organic certified commodities, participation in eco-label certifications and utilization of alternative farming methods such as forest farming, regenerative agriculture, and biodynamic farming in production.

In the survey, AHPA also continues to monitor trade in commodities derived from certain botanicals that AHPA and other organizations have identified as at-risk and/or for which AHPA has a [trade requirement](#) prohibiting wild harvest such as lady's slipper (*Cypripedium* spp.) and/or other recommendations or restrictions such as for chaparral (*Larrea tridentata*). Inclusion of any species for which AHPA has issued guidance or established policy serves only as an opportunity for continued monitoring and does not in any way reflect a change or alteration to existing guidance or policies for any commodity.

The 2024–2025 survey included additional questions regarding current conditions affecting the production and trade of botanical raw materials. Respondents were asked about changes in demand, production costs, supply chain conditions, factors influencing cultivation and wild harvest activities, anticipated industry challenges, and the potential effects of international trade conditions, including tariffs, on demand for North American-produced botanical raw materials.

Responses to these questions are summarized in a separate section of this report. The information is intended to provide additional context regarding current industry conditions.

Fresh vs. Dried Weight

From the first AHPA Tonnage Survey until 2020, quantities in fresh and dried weight were surveyed for all commodities and reported separately; fresh weight harvest remained low for most commodities. To capture the most accurate information regarding total tonnage of each commodity in a single snapshot, survey respondents were asked starting in the 2021–2023 survey to convert all tonnage into dried weight for all commodities. Fresh and dried materials are no longer surveyed separately, and in the 2021–2023 survey respondents were asked to provide total tonnage for each commodity in DRIED weight using the appropriate conversion for each commodity. In the event there is no specific conversion for an individual commodity, the following ratios were provided: below-ground parts – 3:1, above-ground parts – 4:1. To streamline data presentation in the current report and align with this change to the survey, fresh tonnage for all commodities from 2016 to 2020 was converted to dried weight using the same calculations in this report. Thus, all fresh weight conversions are added to the dried weight tables and there are no fresh weight tables or sections in this report.

Administration of the Surveys

AHPA developed, conducted, and tabulated the results of a survey designed to quantify the annual harvest of 126 botanical commodities for harvest conducted from 2024–2025. The survey was distributed on January 20, 2026, and covers harvest years 2024 and 2025. A survey electronic link was distributed via email to AHPA member companies and to a public email distribution list as an *AHPA Update*. Participants in AHPA's past tonnage surveys were contacted via phone and email to solicit contributions for the present efforts; specific outreach to AHPA's Botanical Raw Materials Committee, AHPA's Sustainability Committee, and to known industry producers resulted in additional participants. Survey participants include both AHPA member and non-member companies.

Tonnage data for 2024–2025 was collected utilizing a combination of the Adobe webform platform and emailed Adobe PDF fillable forms, based on respondent preference.

AHPA member companies and network contacts represent many different stakeholder groups across the industry including producers, harvesters, growers, suppliers, manufacturers, retailers, distributors, analytical laboratories, marketers, consultants, legal services, and NGOs. Many of the over four hundred AHPA member companies and organizations either do not trade in the species included in the surveys or are not involved in the actual production of the raw materials in either a wild-harvest or cultivation capacity. Participation in this survey was requested *only* from companies involved in the primary production of raw agricultural materials.

For these surveys, the term “primary raw material producer” was defined as individuals or companies that obtain plant material directly from a wild or cultivated source, or by contracting, purchasing, and/or consolidating these plants from another individual or company who harvests them directly and who was not likely to fill out the survey. As defined in the survey, a “primary raw material producer” could include companies that use the plants directly (e.g., to manufacture herbal extracts for sale to other manufacturers, or to manufacture finished products) and could also include companies that simply sell the raw material to other companies.

This somewhat complex definition was necessitated by an intention to count wild-harvested raw materials once and only once, and to minimize duplicate reporting of the same lot of materials at its various distribution stages. The long-standing structure of the harvest-to-market movement of wild harvested plants relies on a series of supply and purchase points. Materials often move from the actual collector to a “country dealer” located in a community near the harvest area and are then consolidated on a somewhat regional basis. The regional consolidators, who also act as direct purchasers from collectors in their immediate community, serve as clearinghouses for the collected goods. They grade, sort, clean, and pack the raw materials that they have purchased from collectors/harvesters and local dealers, and then sell these goods, either directly to a manufacturer or to a bulk distributor who will sell to manufacturers, sometimes after further processing (e.g., cutting, powdering). Although some manufacturers purchase directly from collectors or “country dealers,” such purchases are believed to represent an insignificant portion of most wild-harvested goods.

In an ideal system to quantify harvests of any plant commodity, data would be produced either at the point of harvest (including every herb farm and individual collector) or at the point at which every consolidated lot of material comes into a certain defined stage of commerce (e.g., the finished product manufacturer). AHPA does not have access to the multitude of individual collectors but does count among its members and non-member contacts most of the regional consolidators of North American wild-harvested herbs, as well as most of the

herb farms and bulk distributors and manufacturers. These regionally located companies were identified as the key respondents and were therefore the focus of AHPA's active solicitation as participants in the surveys.

AHPA requested that any company that received a survey or survey link and did not meet the definition of a "primary raw material producer" should not complete the survey. "Primary raw material producers" were requested to provide harvest data for each of the identified commodities in which they had engaged in trade during any part of the years 2024–2025. Participation by respondents was entirely voluntary. A token "thank you" gift was offered to respondents who provided their survey data by February 27, 2026.

Response Rate and Limitations

AHPA received submissions from 20 primary raw materials producers. This includes thirteen companies that have participated in the survey since at least 2011, most of which have participated since 2006 or 2008 and represent most of the total tonnage reported; one company that first participated in 2014; four companies that first participated in 2018; two companies that first participated in 2021; and one new company that first participated in 2024. One company that first participated in the 2021–2023 survey had previously participated in the 2008–2010 survey. In addition, one longtime respondent returned for the 2024–2025 survey after not participating in the 2021–2023 survey.

Five previous survey respondents did not complete the 2024–2025 survey. Of these, one company that had participated since 2007 is no longer in business; one company that began participating in 2018 is no longer a primary raw materials producer of any surveyed commodities; one company that had participated since 2007 was acquired by another company that did not complete the survey; and two additional companies that had participated beginning in 2014 did not respond for unknown reasons. AHPA believes that much or most of the tonnage previously reported by several of these companies is represented by other survey respondents. For the companies that did not participate for unknown reasons, it is also possible that they had no applicable tonnage to report for the current survey years.

Changes in respondent participation are expected to have the greatest effect on the reported wild-harvested data because one longstanding respondent that has historically represented a significant portion of the reported trade in wild-harvested herbs did not participate in the 2024–2025 survey. However, the return of a longtime respondent that did not participate in the 2021–2023 survey is expected to partially offset this discontinuity in the respondent pool and improve continuity with previous surveys.

Multiple factors can affect survey data quality, including the accuracy of respondents' answers, sample size, representativeness, data collection methods and timing, and potential biases in survey design or respondent selection. AHPA does not know exactly how many individuals and companies are engaged in producing or collecting the plants that are the subject of these surveys and therefore cannot determine what proportion of the total trade is represented by the reported data. Consequently, some of the trends discussed herein may reflect changes in respondent participation over the survey period, including the addition of new respondents, the return of previous respondents, and the absence of respondents in particular survey years. Additionally, while AHPA conducts substantial data review and cleaning, it cannot independently verify the accuracy of all information provided by respondents. Although these limitations are inherent to survey research, AHPA expects that respondents who take the time to complete the survey do so in good faith and with attention to accuracy.

Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds)

Article of commerce		alettris root ¹	alfalfa leaf	American ginseng root ²	American wild ginger	angelica root	arnica any part	artichoke leaf	ashwagandha root	ashwagandha aerial parts	astragalus	bee balm aerial parts	bethroot root
Latin binomial		<i>Aletris farinosa</i>	<i>Medicago sativa</i>	<i>Panax quinquefolius</i>	<i>Asarum canadense</i>	<i>Angelica archangelica</i>	<i>Arnica</i> spp.	<i>Cynara cardunculus</i> var. <i>scolymus</i>	<i>Withania somnifera</i>	<i>Withania somnifera</i>	<i>Astragalus membranaceus</i>	<i>Monarda fistulosa</i>	<i>Trillium erectum</i>
2025	cult. wild	50 468	70,029 0	211,514 ND*	0 72	2,552 0	467 50	9,998 0	39,237 0	4,991 0	1,487 0	2,518 0	0 116
2024	cult. wild	2 269	77,144 0	254,985 17,239*	0 93	773 0	347 50	2,352 0	4,541 0	9,272 0	2,488 0	30 67	400 0
2023	cult. wild	0 385	130,618 100	400,945 30,809*	0 111	1,790 0	345 127	4,306 0	18,359 355	1,653 0	741 0	643 160	0 362
2022	cult. wild	0 67	219,669 0	340,725 27,246*	0 6	4,070 0	183 113	7,475 0	30,133 0	0 0	985 0	286 20	0 173
2021	cult. wild	0 39	110,205 0	227,226 22,047*	0 7	1,716 0	138 740	5,964 0	13,925 0	3,455 0	1,575 0	304 70	0 268
2020	cult. wild	0 366	N/S	224,492 25,785*	N/S	N/S	827 0	N/S	N/S	N/S	N/S	209 0	17 382
2019	cult. wild	0 229	N/S	187,632 31,996*	N/S	N/S	350 0	N/S	N/S	N/S	N/S	29 0	66 195
2018	cult. wild	0 670	N/S	199,641 42,177*	N/S	N/S	442 0	N/S	N/S	N/S	N/S	272 0	0 674
2017	cult. wild	0 1,717	15,236 0	193,003 41,887*	N/S	N/S	330 0	N/S	N/S	N/S	N/S	N/S	0 203
2016	cult. wild	0 1,701	326,259 0	183,467 38,242*	N/S	N/S	315 0	N/S	N/S	N/S	N/S	N/S	0 1,284

[Table continues on next page]

Note: N/S indicates that this commodity was not surveyed for the year indicated.

¹ Also known as true unicorn root.² Quantities for wild ginseng harvest amounts in this survey are reported directly from U.S. Fish and Wildlife. No USFWS data was available for 2025 at the time of publication.

* Any reported wild collected weights for American ginseng are reported from USFWS.

Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		black cherry bark	black chokeberry fruit	black cohosh root	blessed thistle whole plant	black walnut hull	bloodroot root	blue cohosh root	blue flag root	blue vervain aerial parts	boneset aerial parts	borage aerial parts	bugleweed aerial parts
Latin binomial		<i>Prunus serotina</i>	<i>Aronia melanocarpa</i>	<i>Actea racemosa</i> ³	<i>Centaurea benedicta</i>	<i>Juglans nigra</i>	<i>Sanguinaria canadensis</i>	<i>Caulophyllum thalictroides</i>	<i>Iris virginica</i>	<i>Verbena hastata</i>	<i>Eupatorium perfoliatum</i>	<i>Borago officinalis</i>	<i>Lycopus americanus</i>
2025	cult. wild	0 65,058	0 0	300 153,978	5,826 0	442 36,673	90 398	0 1,300	345 1,097	4,319 0	1,342 6,297	1,139 0	1,200 0
2024	cult. wild	0 63,673	0 0	0 168,123	6,287 0	2,866 34,294	1,782 3,312	0 2,256	1,809 208	2,006 52	1,051 7,381	534 0	0 0
2023	cult. wild	0 7,020	0 184	97 78,679	2,915 0	95 97,847	0 1,667	0 819	1,366 137	7,775 482	517 19,188	662 0	394 0
2022	cult. wild	30 15,368	0 0	199 135,116	2,552 231	30 97,087	0 2,269	0 3,062	1,190 123	17,928 36	1,607 4,041	641 0	0 35
2021	cult. wild	83 24,303	0 0	1,631 96,754	15,233 75	0 80,237	0 3,649	0 1,568	1,358 4	5,235 100	3,159 0	525 0	17 602
2020	cult. wild	7 286,492	0 0	2,000 206,887	N/S	0 51,811	266 2,208	0 22	N/S	N/S	N/S	N/S	N/S
2019	cult. wild	4 156,087	0 20,000	1,915 180,308	N/S	41,599 55,942	6 1,220	0 0	N/S	N/S	N/S	N/S	N/S
2018	cult. wild	3 84,104	0 0	1,028 198,446	N/S	0 41,236	0 1,211	0 0	N/S	N/S	N/S	N/S	N/S
2017	cult. wild	0 37,104	0 0	4,020 134,327	N/S	0 63,633	2 920	180 2,544	N/S	N/S	N/S	N/S	N/S
2016	cult. wild	0 29,553	0 0	4,054 179,737	N/S	6,519 53,058	0 2,233	73 2,555	N/S	N/S	N/S	N/S	N/S

[Table continues on next page]

Note: N/S indicates that this commodity was not surveyed for the year indicated.

³ Also known as *Cimicifuga racemosa*.

* Any reported fresh weights for survey years 2016-2020 are converted to dried weight and included in this table.

Table 2: Aggregate Harvest of Commodities, 2014–2023 (In Dried Pounds) [continued]

Article of commerce		European bugleweed aerial parts	bugleweed aerial parts	burdock root	butterfly weed root	calendula flower	California poppy aerial parts	cascara sagrada bark	catnip aerial parts	cayenne fruit	celandine whole plant	chaga whole canker
Latin binomial		<i>Lycopus europaeus</i>	<i>Lycopus virginicus</i>	<i>Arctium lappa</i>	<i>Asclepias tuberosa</i>	<i>Calendula officinalis</i>	<i>Eschscholzia californica</i>	<i>Frangula purshiana</i> ⁴	<i>Nepeta cataria</i>	<i>Capsicum annum</i> L. var. <i>annuum</i>	<i>Chelidonium majus</i>	<i>Inonotus obliquus</i>
2025	cult. wild	0 0	0 0	81,960 0	682 267	2,362 0	5,741 0	0 233,231	184,841 0	0 0	0 0	0 220
2024	cult. wild	0 16	0 201	85,216 0	1,743 1,798	2,021 0	6,922 0	0 474,194	418,035 0	0 0	0 0	0 1,200
2023	cult. wild	0 0	0 1,536	40,893 0	124 3,875	2,545 0	6,325 0	0 115,093	345,543 0	0 0	40 0	0 0
2022	cult. wild	0 0	0 6,480	79,837 0	38 5,107	2089 0	7,243 0	0 182,860	670,900 0	66 0	58 0	0 0
2021	cult. wild	1,998 0	0 5,415	47,050 0	117 4,232	1,583 0	5,620 0	0 153,751	603,001 0	0 0	10 0	0 1,132
2020	cult. wild	N/S	N/S	N/S	N/S	N/S	660 0	0 385,715	N/S	N/S	N/S	0 7,975
2019	cult. wild	N/S	N/S	N/S	N/S	N/S	3,013 0	80 397,981	N/S	N/S	N/S	0 2,000
2018	cult. wild	N/S	N/S	N/S	N/S	N/S	1,228 0	80 385,090	N/S	N/S	N/S	0 4,992
2017	cult. wild	N/S	N/S	39,746 61	N/S	N/S	N/S	0 129,222	N/S	N/S	N/S	N/S
2016	cult. wild	N/S	N/S	3,180 308	N/S	N/S	N/S	0 282,272	N/S	N/S	N/S	N/S

[Table continues on next page]

Note: N/S indicates that this commodity was not surveyed for the year indicated.

⁴ Also known as *Rhamnus purshiana*.

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Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		chamomile flower	chaparral leaf	chaste tree fruit	chickweed aerial parts	chokecherry fruit	comfrey root	comfrey aerial parts	corn silk silk	Culver's root	damiana leaf	dandelion root	dandelion leaf
Latin binomial		<i>Matricaria chamomilla</i>	<i>Larrea tridentata</i>	<i>Vitex agnus-castus</i>	<i>Stellaria media</i>	<i>Prunus virginiana</i>	<i>Symphytum officinale</i>	<i>Symphytum officinale</i>	<i>Zea mays</i>	<i>Veronicastrum virginicum</i>	<i>Turnera diffusa</i>	<i>Taraxacum officinale</i>	<i>Taraxacum officinale</i>
2025	cult. wild	4,004 0	0 0	235 0	11 0	0 0	4,479 0	1,412 0	206 0	23 12	210 1,120	264,076 0	21,848 0
2024	cult. wild	5,906 0	0 0	250 0	0 0	0 0	1,698 0	1,106 0	0 0	15 182	2,230 0	217,952 0	9,762 0
2023	cult. wild	2,635 0	0 1,060	200 89	111 1,277	10,404 0	127 0	486 0	175 0	12 17	199 1,731	118,199 0	26,375 0
2022	cult. wild	2,138 0	0 445	180 457	114 1157	7,716 0	85 0	208 0	50 0	17 366	155 4,020	181,399 0	55,379 0
2021	cult. wild	1,766 0	0 2,676	180 0	139 604	0 0	159 0	96 0	4,297 0	12 89	155 182	103,334 0	22,912 0
2020	cult. wild	N/S	0 0	N/S	N/S	0 0	N/S	N/S	N/S	N/S	0 0	N/S	N/S
2019	cult. wild	N/S	0 0	N/S	N/S	0 0	N/S	N/S	N/S	N/S	165 0	N/S	N/S
2018	cult. wild	N/S	0 0	N/S	N/S	0 0	N/S	N/S	N/S	N/S	165 0	N/S	N/S
2017	cult. wild	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	880 4,465	N/S	N/S
2016	cult. wild	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	250 505	N/S	N/S

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Note: N/S indicates that this commodity was not surveyed for the year indicated.

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Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		Echinacea angustifolia root	Echinacea angustifolia aerial parts	Echinacea pallida root	Echinacea purpurea root	Echinacea purpurea aerial parts	eclipta aerial parts	elderberry berry	elderberry flower	elecampane root	false unicorn root ⁵	feverfew aerial parts	ginkgo leaf
Latin binomial		<i>Echinacea angustifolia</i>	<i>Echinacea angustifolia</i>	<i>Echinacea pallida</i>	<i>Echinacea purpurea</i>	<i>Echinacea purpurea</i>	<i>Eclipta prostrata</i>	<i>Sambucus nigra</i>	<i>Sambucus nigra</i>	<i>Inula helenium</i>	<i>Chamaelirium luteum</i>	<i>Tanacetum parthenium</i>	<i>Ginkgo biloba</i>
2025	cult. wild	8,094 609	7,315 0	0 257	101,614 0	60,004 0	887 0	297 0	100 1000	7,753 0	0 420	6,658 0	7,591 0
2024	cult. wild	36,287 367	0 0	0 0	196,647 0	106,466 0	906 0	167 1055	0 0	3,859 0	0 270	3,155 0	5,467 0
2023	cult. wild	112,360 2,783	29,700 0	0 0	239,658 0	308,879 0	3,487 0	598 10	2,010 0	8,693 0	0 169	7,810 1,191	9,338 0
2022	cult. wild	160,039 12,450	42,679 524	0 0	127,871 0	249,738 0	1,403 0	1,336 10	1,715 0	9,543 0	0 892	5,505 0	6,078 1,705
2021	cult. wild	109,524 14,762	29,420 0	0 3,346	191,227 0	239,972 0	1,357 0	17 1715	20 0	5,252 0	0 1,312	4,660 0	9,325 1,487
2020	cult. wild	44,976 9,661	7,661 24,660	0 4,110	258,604 0	416,535 0	N/S	284,376 0	0 0	N/S	0 670	N/S	N/S
2019	cult. wild	69,816 855	855 14,020	0 0	159,939 1,832	323,056 319	N/S	1020 0	0 2228	N/S	0 1270	N/S	N/S
2018	cult. wild	97,896 11,582	11,582 19,040	33 0	213,601 14	191,420 0	N/S	0 0	10 835	N/S	0 1485	N/S	N/S
2017	cult. wild	54,548 27,659	35,300 0	20 13	179,228 0	136,134 22,901	N/S	N/S	N/S	N/S	0 1,087	N/S	N/S
2016	cult. wild	122,024 21,006	28,340 0	0 0	164,437 0	107,879 2,725	N/S	N/S	N/S	N/S	0 1,311	N/S	N/S

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Note: N/S indicates that this commodity was not surveyed for the year indicated.

⁵ Also known as helonias.

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Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		goldenseal root	goldenseal leaf	hawthorn fruit	holy basil aerial parts	hops flower	horehound aerial parts	hydrangea root	hyssop aerial parts	lavender flower	lemon balm aerial parts	lobelia aerial parts	lomatium root
Latin binomial		<i>Hydrastis canadensis</i>	<i>Hydrastis canadensis</i>	<i>Crataegus</i> spp.	<i>Ocimum tenuiflorum</i>	<i>Humulus lupulus</i>	<i>Marrubium vulgare</i>	<i>Hydrangea arborescens</i>	<i>Hyssopus officinalis</i>	<i>Lavandula angustifolia</i>	<i>Melissa officinalis</i>	<i>Lobelia inflata</i>	<i>Lomatium dissectum</i>
2025	cult. wild	2,226 10,793	0 2,826	572 100	1,742 0	1,280 0	1,296 0	0 8,849	3,837 0	7,966 0	16,876 0	713 61	0 458
2026	cult. wild	2,260 10,665	0 5,322	407 0	6,340 0	3,024 0	2,036 0	0 6,050	1,618 0	226 0	152,223 0	216 1	0 3,477
2023	cult. wild	62 22,307	0 1,480	1,448 5	2,574 0	908 0	606 0	0 22,424	1,113 0	1,528 0	16,525 0	1,603 90	0 742
2022	cult. wild	561 42,589	0 4,896	4,813 225	500 0	1,617 0	545 0	0 20,491	1,141 0	1,591 0	15,274 0	1,255 180	0 1,306
2021	cult. wild	0 56,615	0 9,532	3,975 330	2,938 0	831 0	485 0	0 12,279	3,946 0	1,709 0	17,361 0	151 688	0 1,113
2020	cult. wild	253 66,613	2,753 14,147	N/S	N/S	N/S	N/S	0 9,550	N/S	N/S	N/S	N/S	257 4,673
2019	cult. wild	1,454 36,402	5,160 12,298	N/S	N/S	N/S	N/S	0 34,318	N/S	N/S	N/S	N/S	135 1,779
2018	cult. wild	7,615 53,929	2,212 9,252	N/S	N/S	N/S	N/S	0 9,607	N/S	N/S	N/S	N/S	210 774
2017	cult. wild	7,346 34,390	0 6,314	N/S	N/S	N/S	N/S	2,675 4,212	N/S	N/S	N/S	N/S	0 684
2016	cult. wild	5,527 34,831	520 6,435	N/S	N/S	N/S	N/S	2,165 3,667	N/S	N/S	N/S	N/S	0 20

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Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		marshmallow root	meadowsweet aerial parts	motherwort aerial parts	mountain maple bark	mugwort aerial parts	mullein root	mullein leaf	nettle leaf	oat immature seed	oregano aerial parts	Oregon grape root	oshá root	partridge berry aerial parts
Latin binomial		<i>Althea officinalis</i>	<i>Filipendula ulmaria</i>	<i>Leonurus cardiaca</i>	<i>Acer spicatum</i>	<i>Artemesia vulgaris</i>	<i>Verbascum thapsus</i>	<i>Verbascum thapsus</i>	<i>Urtica dioica</i>	<i>Avena sativa</i>	<i>Origanum vulgare</i>	<i>Berberis aquifolium</i>	<i>Ligusticum porteri</i>	<i>Mitchella repens</i>
2025	cult. wild	117,556 0	0 0	6,930 0	0 55,259	2,976 0	7,665 0	493 0	115,355 0	12,536 0	1,994 0	344 51,924	215 1,992	0 544
2024	cult. wild	151,335 0	4,233 0	2,175 0	0 1,253	1,253 0	4,861 0	2,175 87	113,886 0	8,787 0	1,478 0	668 57,409	225 1,023	0 1,235
2023	cult. wild	62,746 536	266 1,128	5,828 290	0 0	3,856 0	1,611 1	4,164 589	100,857 0	35,756 200	3,610 0	300 27,025	674 5,491	0 1,804
2022	cult. wild	8,292 1,078	298 1,048	4,869 750	0 0	11,276 0	2,540 633	483 0	107,348 0	78,897 0	2,293 0	1,180 22,080	112 2,869	20 1,885
2021	cult. wild	62,111 545	247 0	4,419 2,006	0 11,607	10,624 0	1,824 442	598 530	104,133 0	58,740 0	1,757 0	300 31,667	62 5,205	0 2,015
2020	cult. wild	N/S	N/S	N/S	0 79,912	N/S	N/S	N/S	N/S	N/S	N/S	7 23,653	165 469	0 1,229
2019	cult. wild	N/S	N/S	N/S	0 75,575	N/S	N/S	N/S	N/S	N/S	N/S	557 38,982	12 872	0 1,323
2018	cult. wild	N/S	N/S	N/S	0 120,524	N/S	N/S	N/S	N/S	N/S	N/S	507 43,509	46 1,083	0 619
2017	cult. wild	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0 35,119	0 1,130	0 440
2016	cult. wild	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0 13,042	0 1,986	0 261

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Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		passionflower aerial parts	peppermint aerial parts	pipsissewa aerial parts	plantain leaf	poke root	pulsatilla aerial parts	red clover aerial parts	rosemary aerial parts	rue aerial parts	sage aerial parts	sarsaparilla rhizome	shepherd's purse aerial parts
Latin binomial		<i>Passiflora incarnata</i>	<i>Mentha × piperita</i>	<i>Chimaphila umbellata</i>	<i>Plantago major</i>	<i>Phytolacca americana</i>	<i>Pulsatilla vulgaris</i>	<i>Trifolium pratense</i>	<i>Rosmarinus officinalis</i>	<i>Ruta graveolens</i>	<i>Salvia officinalis</i>	<i>Smilax</i> spp.	<i>Capsella bursa-pastoris</i>
2025	cult. wild	1,055 648	765,729 0	0 1,971	12,405 0	1,888 4,495	0 0	15,424 0	376 0	2,939 0	2,081 0	0 690	200 0
2024	cult. wild	3,319 2,723	694,440 0	0 1,217	1,660 0	1,456 2,583	0 4	7,315 5	509 0	3,087 0	1,472 0	0 2,150	105 0
2023	cult. wild	2,574 529	478,629 0	0 480	8,148 0	1,668 602	20 124	2,843 25	991 0	2,889 0	2,892 0	25 1,490	202 123
2022	cult. wild	3,010 757	457,602 0	0 415	6,074 0	835 476	0 81	1,098 0	622 0	2,239 0	5,328 0	0 561	109 19
2021	cult. wild	3,906 1,226	37,142 0	0 1,372	3,421 0	450 1,615	11 11	1,806 0	143,372 0	1,246 0	4,921 0	0 3,080	186 36
2020	cult. wild	1,324 593	N/S	190 227	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S
2019	cult. wild	4,144 0	N/S	175 112	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S
2018	cult. wild	3,925 90	N/S	0 862	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S
2017	cult. wild	0 37,801	N/S	0 623	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S
2016	cult. wild	26,217 0	N/S	0 564	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S

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Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		skullcap aerial parts	slippery elm bark	Solomon's seal root	spearmint aerial parts	spilanthes aerial parts	St. John's wort flowering tops	stone root root	sweet wormwood aerial parts	thyme aerial parts	usnea lichen	valerian root	violet aerial parts
Latin binomial		<i>Scutellaria lateriflora</i>	<i>Ulmus rubra</i>	<i>Polygonatum biflorum</i>	<i>Mentha spicata</i>	<i>Acmella oleracea</i>	<i>Hypericum perforatum</i>	<i>Collinsonia canadensis</i>	<i>Artemisia annua</i>	<i>Thymus vulgaris</i>	<i>Usnea</i> spp.	<i>Valeriana officinalis</i>	<i>Viola tricolor</i>
2025	cult. wild	91,104 2,737	0 173,092	0 265	367,867 0	589 0	930 0	158 9,684	3,511 0	946 0	0 2,940	37,946 0	0 510
2024	cult. wild	70,865 1,671	0 121,502	0 868	227,313 0	138 0	623 0	618 25,291	2,500 0	1,125 0	0 1,990	54,625 0	0 0
2023	cult. wild	172,286 4,586	0 82,477	0 254	101,436 0	1,025 0	1,279 762	35 9,750	2,875 0	938 0	0 2,683	147,486 0	0 1
2022	cult. wild	57,211 3,354	0 146,928	0 278	204,548 0	1,188 0	3,957 732	28 13,304	3,537 0	975 0	0 1,219	72,046 0	471 0
2021	cult. wild	70,995 5,336	0 280,089	59 212	103,699 0	1,085 0	858 3,325	47 9,911	1,823 0	809 0	0 700	65,218 0	62 105
2020	cult. wild	45,474 1,200	6,184 353,606	41 219	N/S	N/S	N/S	0 12,148	N/S	N/S	0 755	N/S	N/S
2019	cult. wild	87,069 8,746	13,638 329,097	60 89	N/S	N/S	N/S	0 10,982	N/S	N/S	0 1,391	N/S	N/S
2018	cult. wild	104,360 7,606	8,139 221,915	521 250	N/S	N/S	N/S	0 4,045	N/S	N/S	0 165	N/S	N/S
2017	cult. wild	N/S	11,000 150,461	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0 1,050	N/S	N/S
2016	cult. wild	N/S	1,850 147,920	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0 350	N/S	N/S

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Table 2: Aggregate Harvest of Commodities, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		Virginia snakeroot	white sage aerial parts	wild yam root	witch hazel bark	witch hazel twigs	witch hazel leaf	wood betony leaf	wormwood aerial parts	yarrow leaf and flower	yellow dock root	yerba mansa root	yerba santa leaf
Latin binomial		<i>Aristolochia serpentaria</i>	<i>Salvia apiana</i>	<i>Dioscorea villosa</i>	<i>Hamamelis virginiana</i>	<i>Hamamelis virginiana</i>	<i>Hamamelis virginiana</i>	<i>Stachys officinalis</i>	<i>Artemisia absinthium</i>	<i>Achillea millefolium</i>	<i>Rumex crispus</i>	<i>Anemopsis californica</i>	<i>Eriodictyon</i> spp.
2025	cult. wild	0 18	33 0	0 16,861	0 16,987	0 1,115	0 10,498	0 5	6,980 0	10,474 0	1,380 13	300 0	1,524 643
2024	cult. wild	0 58	87 0	0 16,040	0 29,539	0 0	0 10,874	0 0	2,325 0	4,872 0	2,601 1,142	0 845	0 2,302
2023	cult. wild	0 3	774 0	0 19,666	0 6,423	0 50	300 1,978	146 918	10,494 0	10,317 291	3,007 3,592	0 0	0 1,800
2022	cult. wild	0 10	2,168 0	171 26,052	0 5,883	0 0	20 3,147	93 188	15,594 0	9,773 52	3,636 2,213	0 0	0 2,000
2021	cult. wild	0 9	2,200 0	50 29,881	0 10,178	0 0	200 4,524	88 20	5,875 0	6,566 232	2,737 2,636	0 0	0 6,500
2020	cult. wild	0 136	N/S	0 31,915	0 17,132	0 0	0 28,685	N/S	N/S	2,702 492	N/S	0 186	0 8,352
2019	cult. wild	0 10	N/S	18 11,748	0 6,819	0 0	6 4,829	N/S	N/S	1,538 202	N/S	0 470	0 3,033
2018	cult. wild	0 26	N/S	0 14,265	0 6,883	0 0	0 959	N/S	N/S	1,457 136	N/S	0 359	0 2,623
2017	cult. wild	0 51	N/S	32,013 19,504	0 6,613	0 0	0 2,079	N/S	N/S	N/S	N/S	0 522	0 5,483
2016	cult. wild	0 88	N/S	50,015 17,561	0 10,064	0 4,337	0 6,336	N/S	N/S	N/S	N/S	0 596	0 4,201

Note: N/S indicates that this commodity was not surveyed for the year indicated.

* Any reported fresh weights for survey years 2016-2020 are converted to dried weight and included in this table.

Note: Tonnage data for previous survey years can be found in the AHPA Tonnage Survey corresponding to the year(s) in question. The following links provide direct access to the archived documents for tonnage data collected from 1997–2017:

- [2018–2023 Tonnage Survey of Select Plants Produced in North America](#)
- [2011–2017 Tonnage Survey of Select North American Wild-Harvested Plants](#)
- [2006–2010 Tonnage Survey of Select North American Wild-Harvested Plants](#)
- [2004–2005 Tonnage Survey of Select North American Wild-Harvested Plants](#)
- [2002–2003 Tonnage Survey of Select North American Wild-Harvested Plants](#)
- [2000–2001 Tonnage Survey of Select North American Wild-Harvested Plants](#)
- [1999 Tonnage Survey of Select North American Wild-Harvested Plants](#)

Analysis of the Surveys for Dried Plant Material

Aggregate data for dried (dehydrated) plant material is presented in **Table 2**. Dried harvest data were not reported for any survey years for several commodities; these include the following: barbasco (*Dioscorea composita*) rhizome, Echinacea pallida aerial parts, lady's slipper (*Cypripedium* spp.) root, sundew (*Drosera* spp.) herb, and Venus flytrap (*Dionaea muscipula*) whole plant. If historical context is desired to evaluate harvest trends, harvest data from previous AHPA surveys and further background discussion of events influencing older harvest data from 1999–2023 can be accessed in previous AHPA tonnage reports available on the [AHPA website](#).

Botanicals with No Reported Production

Of the 126 botanical commodities representing 113 different plant species included in the survey, barbasco root, lady's slipper root, sundew aerial parts, and Venus flytrap whole plant have not reported cultivated or wild-harvested tonnage during any survey year. These commodities have been omitted from the summary tables and are not discussed further in the cultivation and wild-harvest summaries presented below.



Pink lady's slipper
(*Cypripedium acaule*)

Overall Cultivated and Wild Production

Figure 1 displays the total reported cultivated and wild botanical production for all surveyed species over the past five years from 2021 through 2025. Across the reporting period, cultivated production consistently accounted for the majority of reported harvest, representing approximately 73% to 84% of total production. Wild-harvested botanicals contributed the remaining 16% to 27%. Although total reported production varied among years, the overall relationship between cultivated and wild production remained relatively consistent, with cultivated harvest accounting for approximately three-quarters of total reported production throughout the reporting period.

Interpretation of the 2025 totals should consider that wild American ginseng harvest data were not available from the U.S. Fish and Wildlife Service at the time this report was prepared.

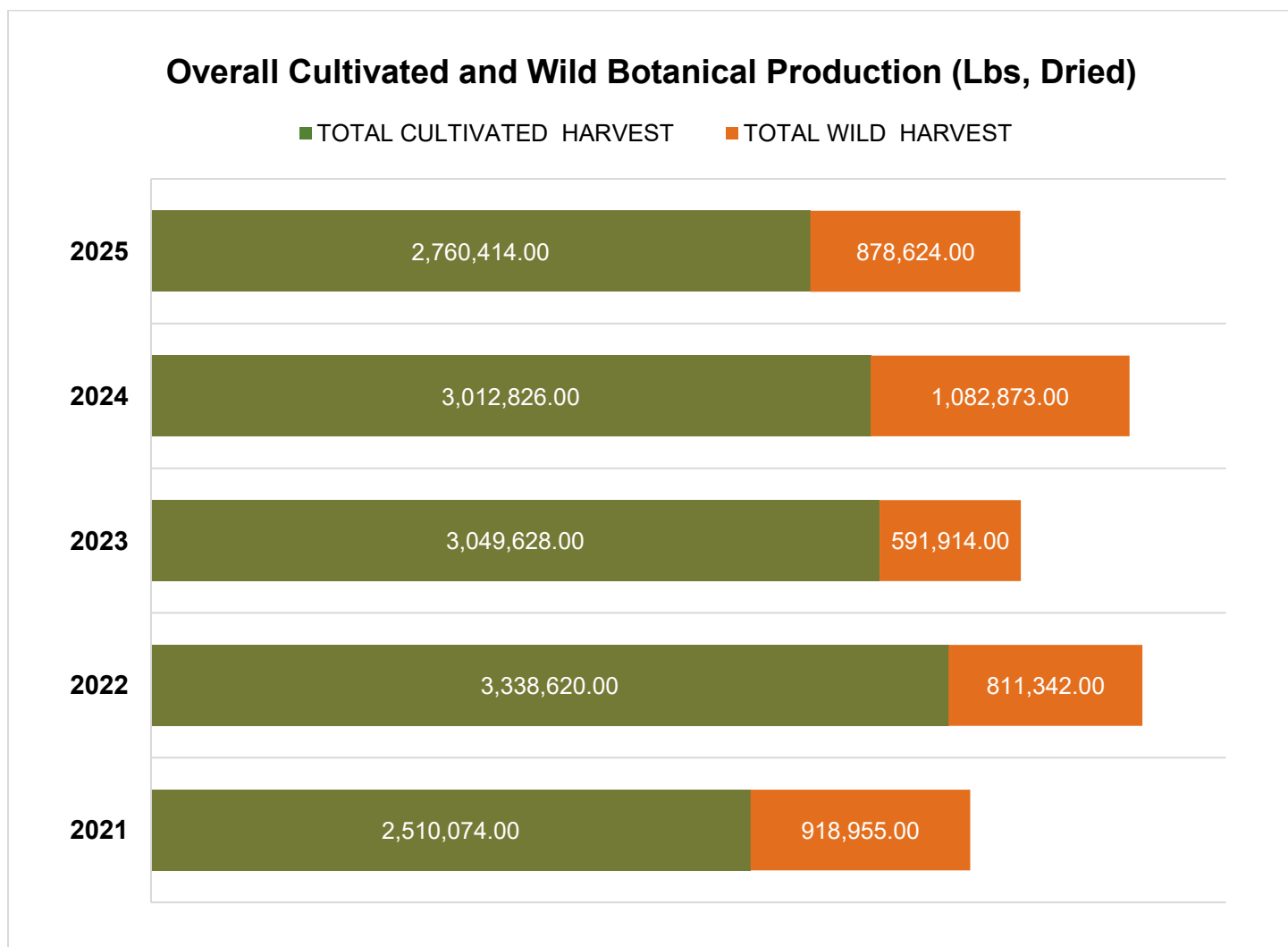


Figure 1

The AHPA Tonnage Surveys document raw botanical materials from both cultivated and wild-harvested sources, providing a comprehensive view of commercially harvested botanicals produced in North America. Examining aggregate reported annual harvest by production source illustrates the relative contribution of cultivated- versus wild-harvested materials to the botanical marketplace.

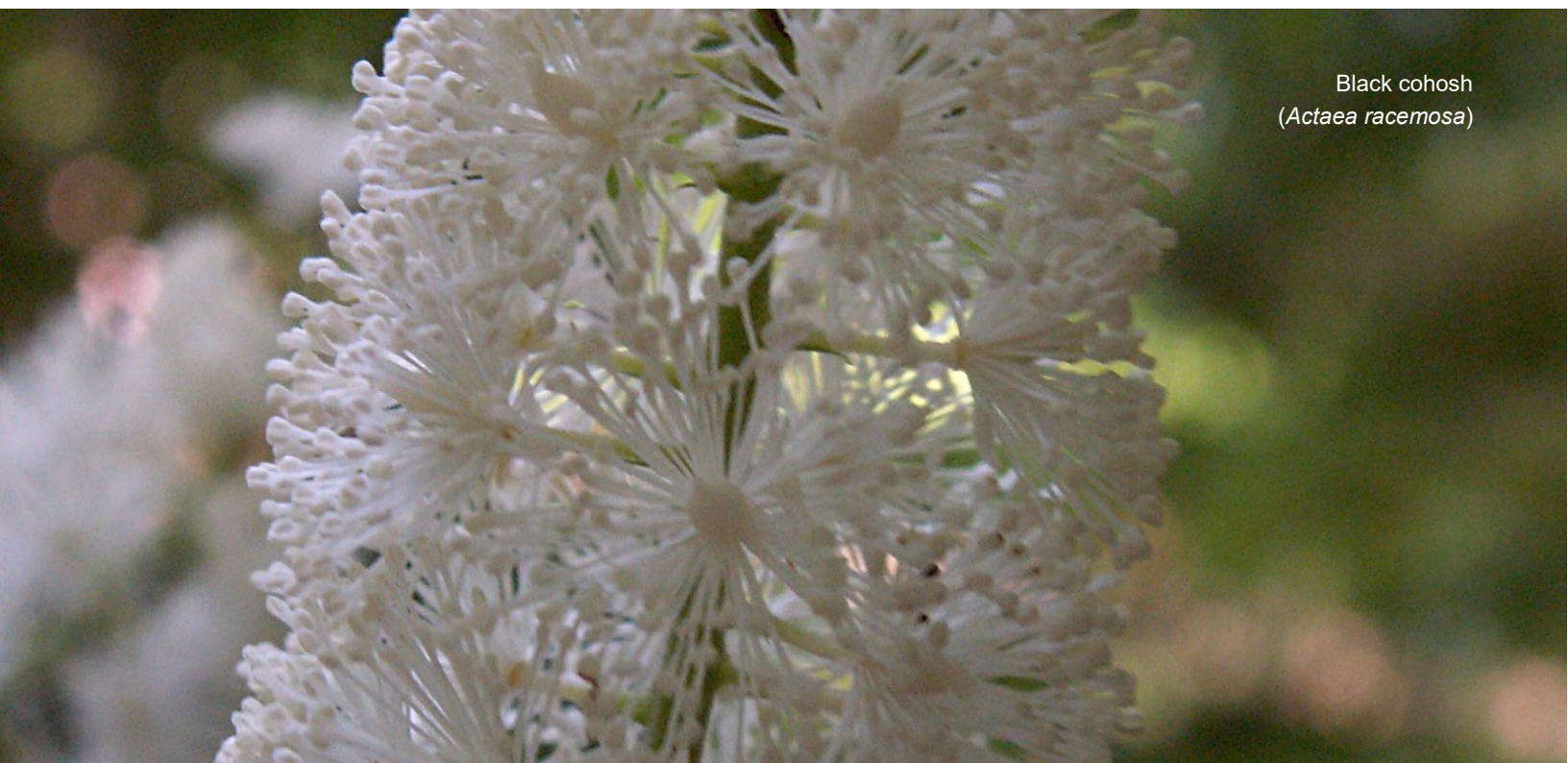
Reported Cultivated Production

Aggregate reported cultivated production ranged from approximately 2.5 to 3.3 million pounds annually during the 2021–2025 reporting period. Cumulative reported cultivated production totaled approximately 14.7 million pounds over the five-year period from 2021–2025 since the survey was expanded to include these numbers. Cultivated production includes both North American native botanicals and non-native species that are commercially produced in the United States.

Reported cultivated production was recorded for 101 botanical commodities, representing 93 plant species, during the 2024–2025 survey years. Of these species, 42 species are native to North America and 51 are non-native species, all of which are currently being commercially cultivated in North America.

For twenty-nine botanical commodities, no cultivated tonnage was reported during either survey year. These included American wild ginger root, bethroot root, black cherry bark, blue cohosh root, American bugleweed aerial parts, European bugleweed aerial parts, cascara sagrada bark, chaga whole canker, *Echinacea pallida* root, *Echinacea pallida* aerial parts, false unicorn root, goldenseal leaf, hydrangea root, lomatium root, mountain maple bark, partridge berry aerial parts, pipsissewa aerial parts, passionflower aerial parts, sarsaparilla rhizome, slippery elm bark, Solomon's seal root, usnea lichen, violet aerial parts, Virginia snakeroot, wild yam root, witch hazel bark, witch hazel twigs, witch hazel leaf, and wood betony leaf.

Cultivated quantities reported for aletris root, American ginseng leaf, black cohosh root, black walnut hulls, bloodroot root, butterfly weed root, goldenseal root, Oregon grape root, osha root, poke root, skullcap aerial parts, and stone root were insignificant either relative to reported wild harvest quantities or in absolute amounts. Unlike the 2021–2023 survey, which reported no cultivated tonnage for goldenseal root, the 2024–2025 survey reported cultivated quantities during both survey years.



Black cohosh
(*Actaea racemosa*)

High Volume Herbs: Cultivated

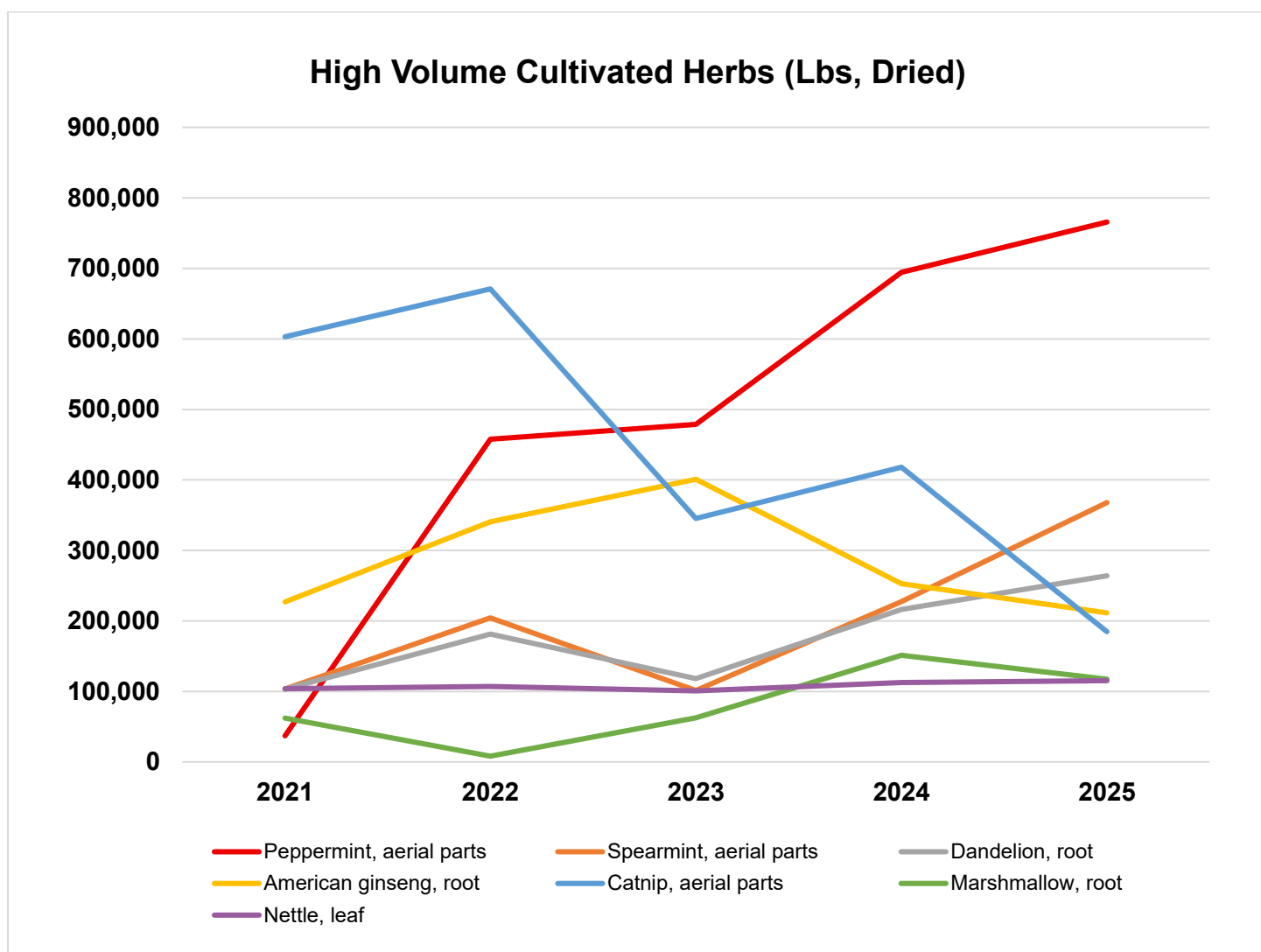


Figure 2

Beginning with the 2021 harvest year, the AHPA Tonnage survey expanded to collect harvest quantities for selected commercially cultivated herbs produced in North America. Reported dried harvest quantities for six high volume cultivated botanicals during the 2021–2025 harvest years are presented in **Figure 2**. The selected herbs include peppermint aerial parts, spearmint aerial parts, dandelion root, American ginseng root, catnip aerial parts, marshmallow root, and nettle leaf.

As can be seen, reported harvest quantities varied among the selected herbs over the five-year reporting period. Reported peppermint aerial parts increased each survey year from 2021 through 2025. Reported catnip aerial parts increased from 2021 to 2022 and declined during the remaining survey years. Reported American ginseng root remained relatively stable, with modest increase through 2023 before a modest decline during 2024 and 2025. Reported spearmint aerial parts and dandelion root generally increased over the reporting period despite year-to-year fluctuations. Reported marshmallow root declined in 2022 before increasing and remaining relatively stable over the most recent survey years. Reported harvest of nettle leaf remained relatively consistent throughout the five-year reporting period.

Reported Wild Production

Aggregate reported wild harvest ranged from approximately 592,000 to 1.08 million pounds annually during the 2021–2025 reporting period. Wild harvest continues to represent an important component of commercial botanical production in North America, and many North American native botanical commodities included in the survey continue to be obtained primarily or exclusively through wild harvest, while others are supplied through a combination of wild harvest and cultivation. Reported wild harvest was recorded for 58 botanical commodities, representing 52 plant species, during the 2024–2025 survey years.

The botanical commodities identified above with no cultivated tonnage reported during the 2024–2025 survey years were represented entirely by wild-harvested materials during the current survey period. Several native North American botanical commodities, including aletris root, black cohosh root, black walnut hulls, bloodroot root, goldenseal root, Oregon grape root, osha root, poke root, skullcap aerial parts, and stone root, had both cultivated and wild harvest quantities reported during the 2024–2025 survey years, although cultivated production remained comparatively small relative to reported wild harvest quantities.

Oregon grape
(*Berberis aquifolium*)



High Volume Herbs: Wild

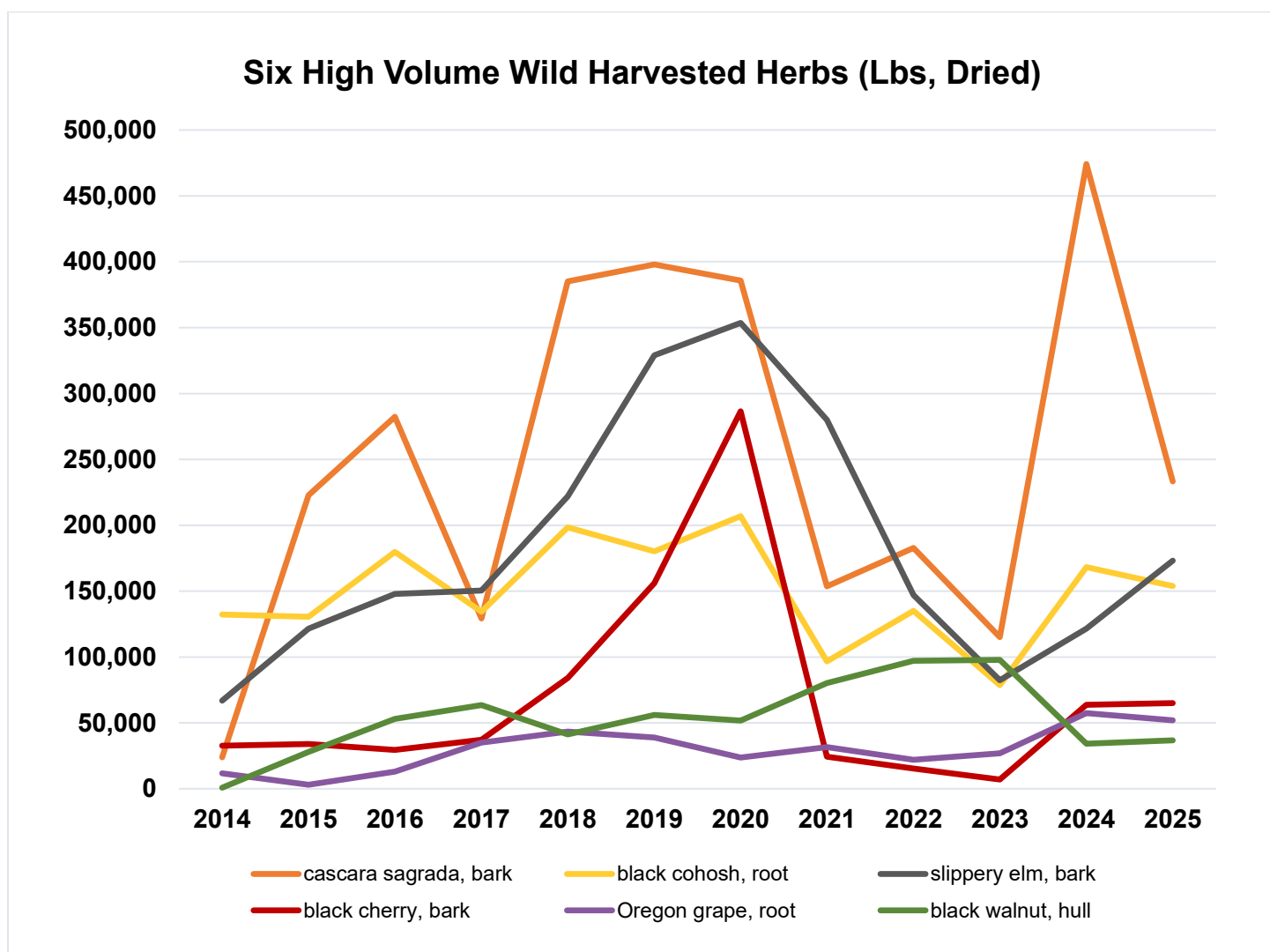


Figure 3

Figure 3 presents the six highest-volume dried wild-harvested botanical commodities reported during the survey period. Data from 2014 through 2025 are shown to illustrate long-term trends, while the discussion below focuses on changes observed during the 2024–2025 survey years. As discussed in the Response Rate and Limitations section, changes in respondent participation should be considered when interpreting year-to-year changes in reported quantities, particularly for wild-harvested commodities.

Slippery elm remained the highest-volume wild-harvested botanical reported in 2025, increasing in reported harvested pounds from 82,477 in 2023 to 121,502 in 2024 and 173,092 in 2025. Although reported quantities remain below the peak reported in 2020, the commodity has shown a strong recovery from the lower levels reported during 2021–2023.

Cascara sagrada bark showed the largest year-to-year increase among the six commodities, rising from 115,093 pounds in 2023 to 474,194 in 2024, the highest quantity reported during the 2014–2025 survey period. Reported quantities declined to 233,231 pounds in 2025 but remained substantially above the 2023 level.

Black cohosh root increased from 78,679 reported pounds in 2023 to 168,123 pounds in 2024 before declining slightly to 153,987 pounds in 2025. Although remaining below the levels reported during 2018–2020, reported quantities exceeded those of 2021 and 2023.

Black cherry bark increased from 78,679 pounds in 2023 to 63,673 pounds in 2024 and 65,058 pounds in 2025. This represents a substantial increase from the relatively low quantities reported during 2021–2023, although reported quantities remain below the peak levels reported in 2019 and 2020.

Oregon grape root increased from 27,025 pounds in 2023 to 57,409 pounds in 2024 before declining slightly to 51,924 pounds in 2025. Both years exceeded all previously reported quantities during the 2014–2025 survey period.

Black walnut hull declined from 97,847 pounds in 2023 to 34,294 pounds in 2024 before increasing slightly to 36,673 pounds in 2025, reversing the generally increasing trend observed between 2018 and 2023. This decline in reported harvest could have been affected by the respondent changes described previously in this report.

American Ginseng

American ginseng root is a unique botanical commodity within the North American herbal products industry. It has been traded internationally since the eighteenth century, and was among North America's earliest commercially exported botanical commodities.¹ American ginseng was included in Appendix II of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) in 1975 due to concerns that overharvest associated with international trade could adversely affect wild populations. International trade in wild-harvested American ginseng continues to be regulated through state, Tribal, and federal programs to ensure that exported roots are legally acquired and that exports are not detrimental to the survival of the species in the wild.

American ginseng root has been included in the AHPA Tonnage Survey since 1999, and reported harvest quantities were presented in the first AHPA Tonnage Survey report. In subsequent survey reports, AHPA continued to collect annual harvest quantities for both cultivated and wild-harvested American ginseng root but did not present the data because AHPA considered the U.S. Fish and Wildlife Service (USFWS) to maintain the most complete available dataset for wild American ginseng harvest through administration of the CITES export program. Beginning with the 2018 harvest year, the survey was expanded to also collect annual harvest quantities for American ginseng leaf.

American ginseng wild root is distinct from the other botanical commodities included in this report because it is predominantly traded through a unique commercial and regulatory supply chain. For decades, AHPA has considered harvest records maintained by the U.S. Fish and Wildlife Service through administration of the CITES export program to provide the most complete available representation of commercial wild American ginseng root harvest. Beginning with the current report, AHPA presents cultivated American ginseng root harvest quantities collected through the AHPA Tonnage Survey together with wild root harvest quantities reported by the USFWS. Presenting these complementary datasets provides a more complete representation

¹ U.S. Fish and Wildlife Service. (n.d.). *Ginseng: Information for ginseng diggers, dealers, and exporters*. U.S. Department of the Interior. Retrieved July 23, 2026, from <https://www.fws.gov/apps/carp/international-affairs/permits/ginseng>

of commercial American ginseng root production in North America by combining the most comprehensive available information on regulated wild harvest with survey data on cultivated production, allowing readers to compare the relative contributions of both production systems over time.

Reported harvest quantities for cultivated and wild American ginseng root are presented in **Figure 4**. Reported cultivated harvest quantities substantially exceeded reported wild harvest quantities throughout the reporting period. Reported cultivated American ginseng root harvest remained relatively consistent from 2014 through 2021, with modest year-to-year variation. Reported quantities increased substantially during 2022 and 2023 before declining in 2024 and 2025 to levels more consistent with those observed earlier in the reporting period. These fluctuations are not likely attributed to changes in survey response rate however, it is expected that amounts of cultivated American ginseng in North America are under reported in this survey due to differences in the primary producers and supply chain for this commodity compared with other forest understory herbs represented in the survey. As provided by the U.S. Fish and Wildlife Service, reported wild harvest amounts also varied annually with 2014 and 2015 numbers representing higher harvests and subsequent years showing lower reported harvests.

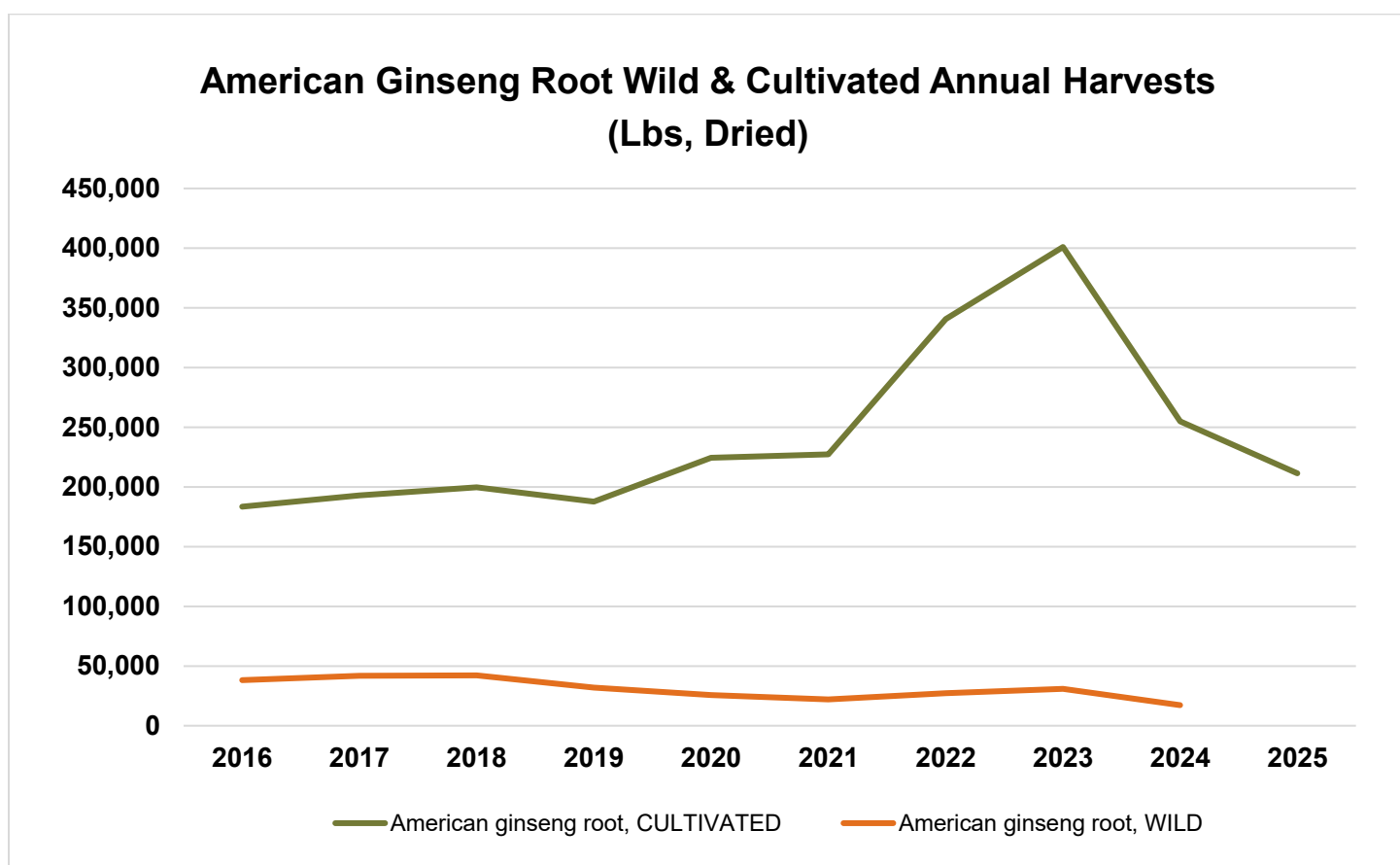


Figure 4

Note: The comparatively low 2024 reported wild harvest amount should be interpreted with appropriate caution. The 2024 data were obtained through a different U.S. Fish and Wildlife Service reporting process than in previous years and were not accompanied by the annual Non-Detriment Finding documentation that had been provided in prior reporting cycles. Because these data were compiled during a period of organizational changes within the federal government, the extent to which administrative factors may have influenced the completeness or timing of reporting is unknown.

Goldenseal

While not a high-volume herb during the 2024–2025 survey years, goldenseal continues to be an herb of significant importance to the industry, commanding a higher per pound value than many other forest understory species. It was included in Appendix II of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) in 1997. **Figure 5** illustrates the relative contributions of cultivated and wild-harvested dried goldenseal root during the 2015–2025 reporting period. Dried goldenseal root entering the market continued to be predominantly from wild-harvested sources throughout the reporting period. According to industry experts, the number of goldenseal cultivators remains relatively low due to barriers to commercial cultivation, including limited availability of planting stock, a lengthy production cycle, and regulations and policies affecting production. Consequently, annual reported cultivated harvest quantities may be influenced by harvest decisions made by a relatively small number of producers.



**Cultivated vs. Wild Goldenseal Root Harvests (Lbs, Dried)
2015–2025**

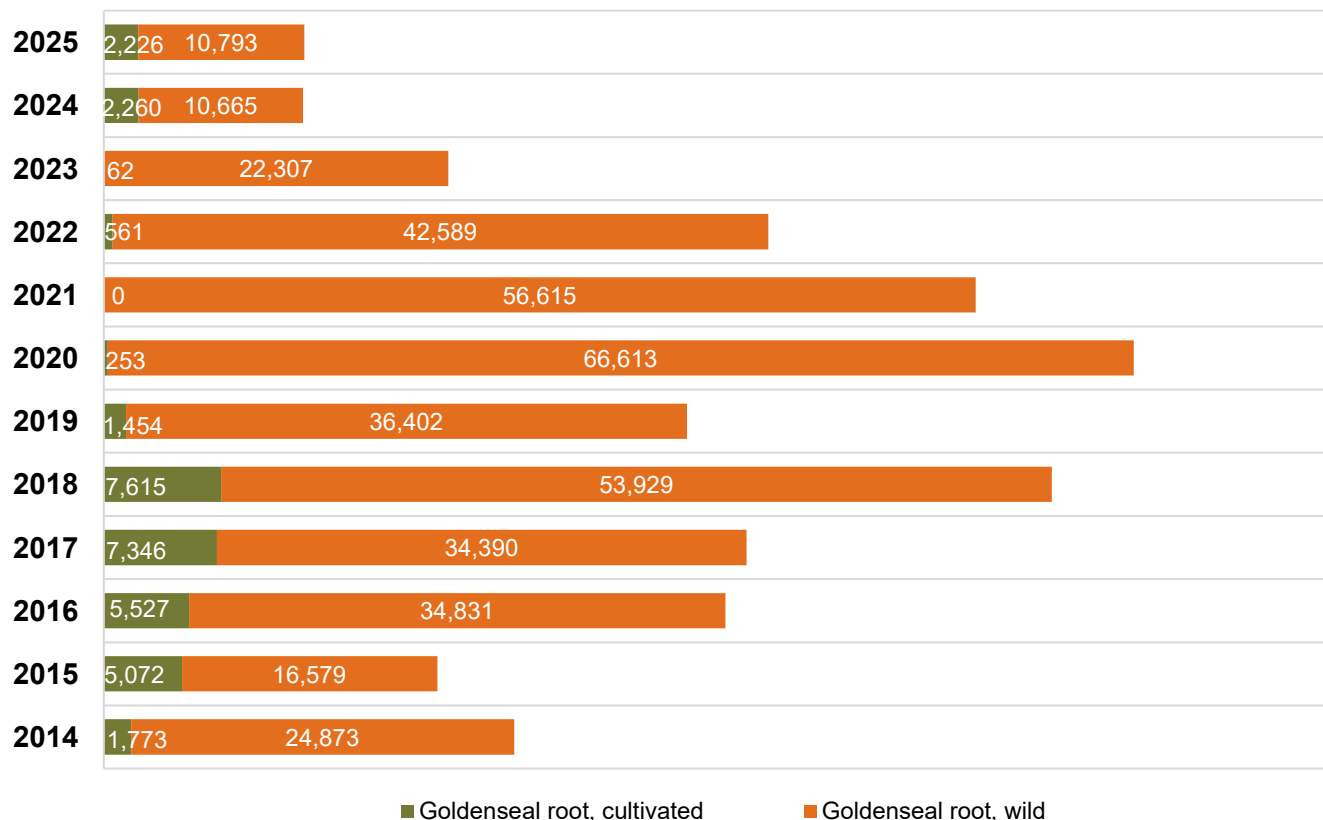


Figure 5

Annual reported harvest quantities of cultivated and wild-harvested dried goldenseal root are presented in **Figure 6**. As with the other commodities discussed in this report, all quantities are presented as dried weight. Reported goldenseal root harvest fluctuated throughout the 2015–2025 reporting period, with wild-harvested quantities increasing through 2020 before declining during the subsequent survey years. The comparatively high reported wild harvest quantities observed in 2020 may have been influenced by increased demand for botanical ingredients commonly used in immune-support products during the COVID-19 pandemic. As discussed in the Response Rate and Limitations section, changes in respondent participation should also be considered when interpreting the lower reported harvest quantities observed during the most recent survey years. Reported cultivated root harvest remained comparatively low throughout the reporting period, although reported quantities increased in 2024 and remained at a similar level in 2025.

Annual reported quantities of cultivated and wild-harvested goldenseal leaf are presented in **Figure 7**. Reported wild harvest of dried leaf generally declined following the 2020 peak, although reported quantities increased in 2024 before declining in 2025. Reported quantities during the final two survey years remained below those observed during the earlier years of the reporting period.

Reported cultivated harvest of goldenseal leaf remained limited throughout the reporting period, and no cultivated leaf harvest was reported during 2021–2025. Wild-harvested leaf continued to account for nearly all reported goldenseal leaf entering commerce.

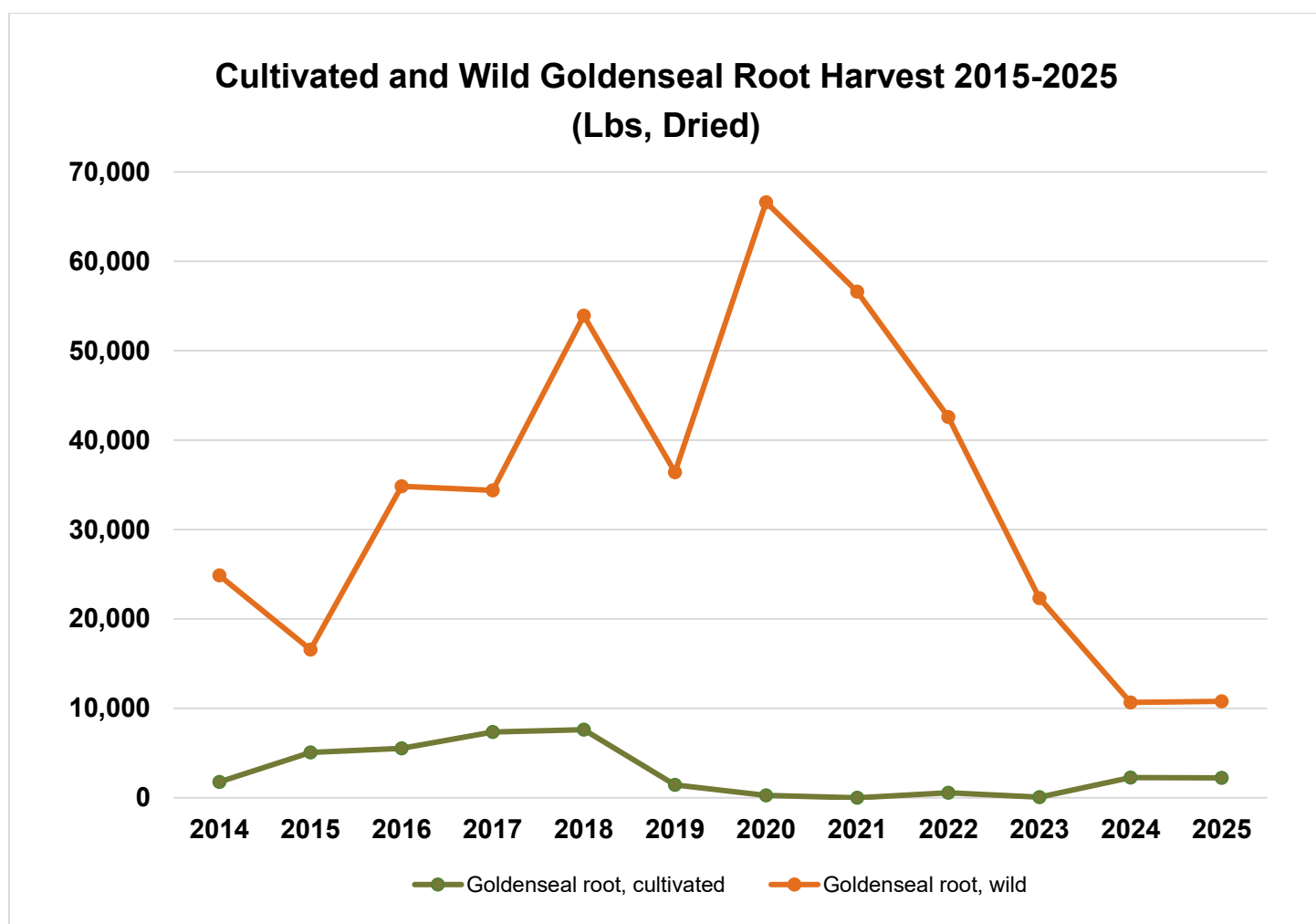


Figure 6

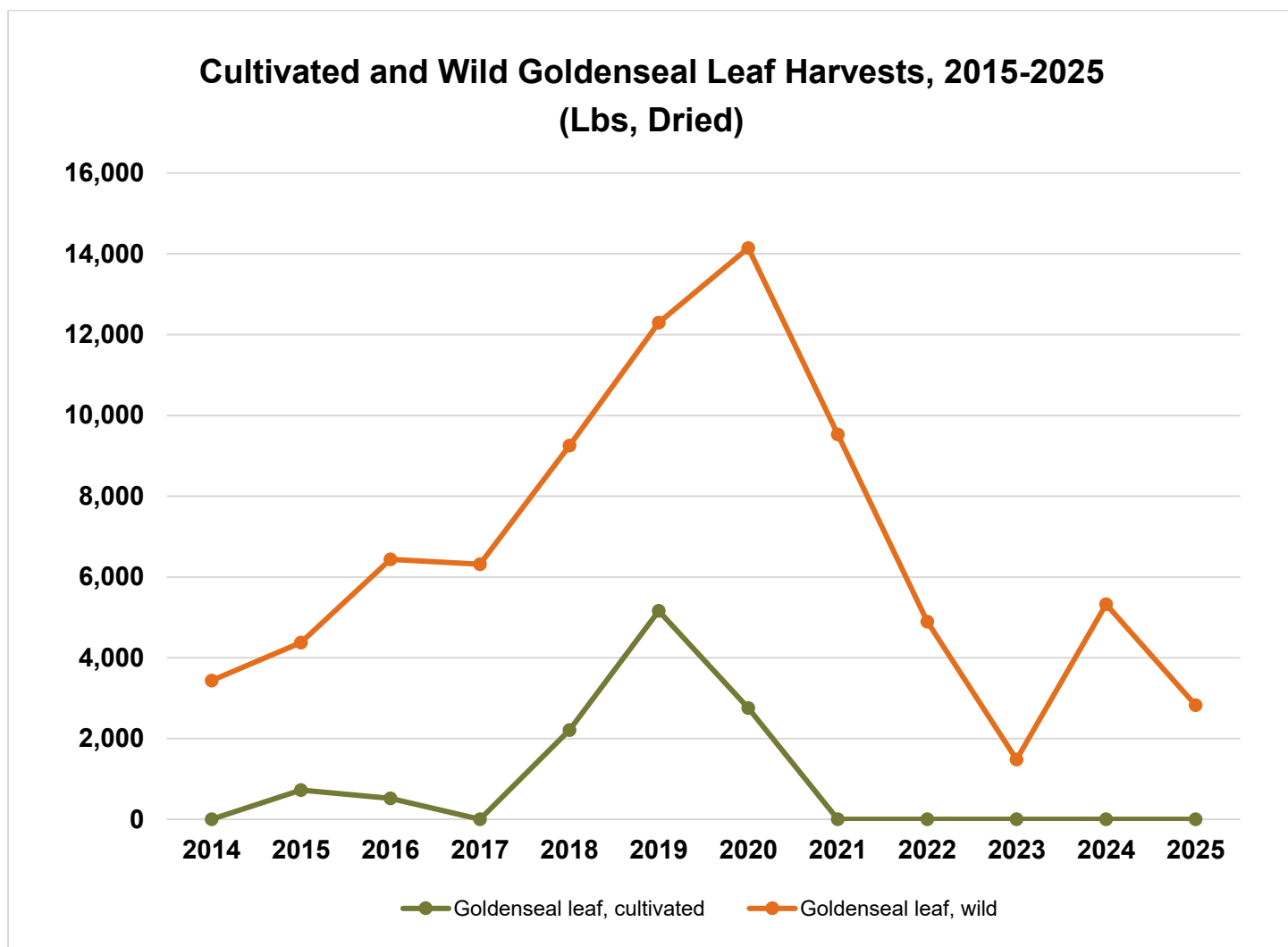


Figure 7

Other High Volume Dried Plant Material

Echinacea spp.

Reported harvest quantities for wild *Echinacea* spp. are presented in **Figure 8**. Throughout the reporting period, *Echinacea angustifolia* root accounted for the majority of reported wild harvest, while reported harvests of *Echinacea pallida* and *Echinacea purpurea* root remained comparatively low, with annual reported quantities generally remaining below 2,000 pounds. Reported wild harvest of *Echinacea angustifolia* root fluctuated during 2018–2022, reaching its highest reported quantity of 14,762 pounds in 2021, before declining during the remaining survey years. As discussed in the Response Rate and Limitations section, changes in respondent participation should also be considered when interpreting reported quantities for recent survey years.

The reported harvest of cultivated dried *Echinacea angustifolia* root (**Figure 9**) showed a general decline from 2018 through 2020 before increasing to its highest reported quantity of 160,039 pounds in 2022. Reported harvest quantities then decreased during the remaining survey years, reaching 8,094 pounds in 2025.

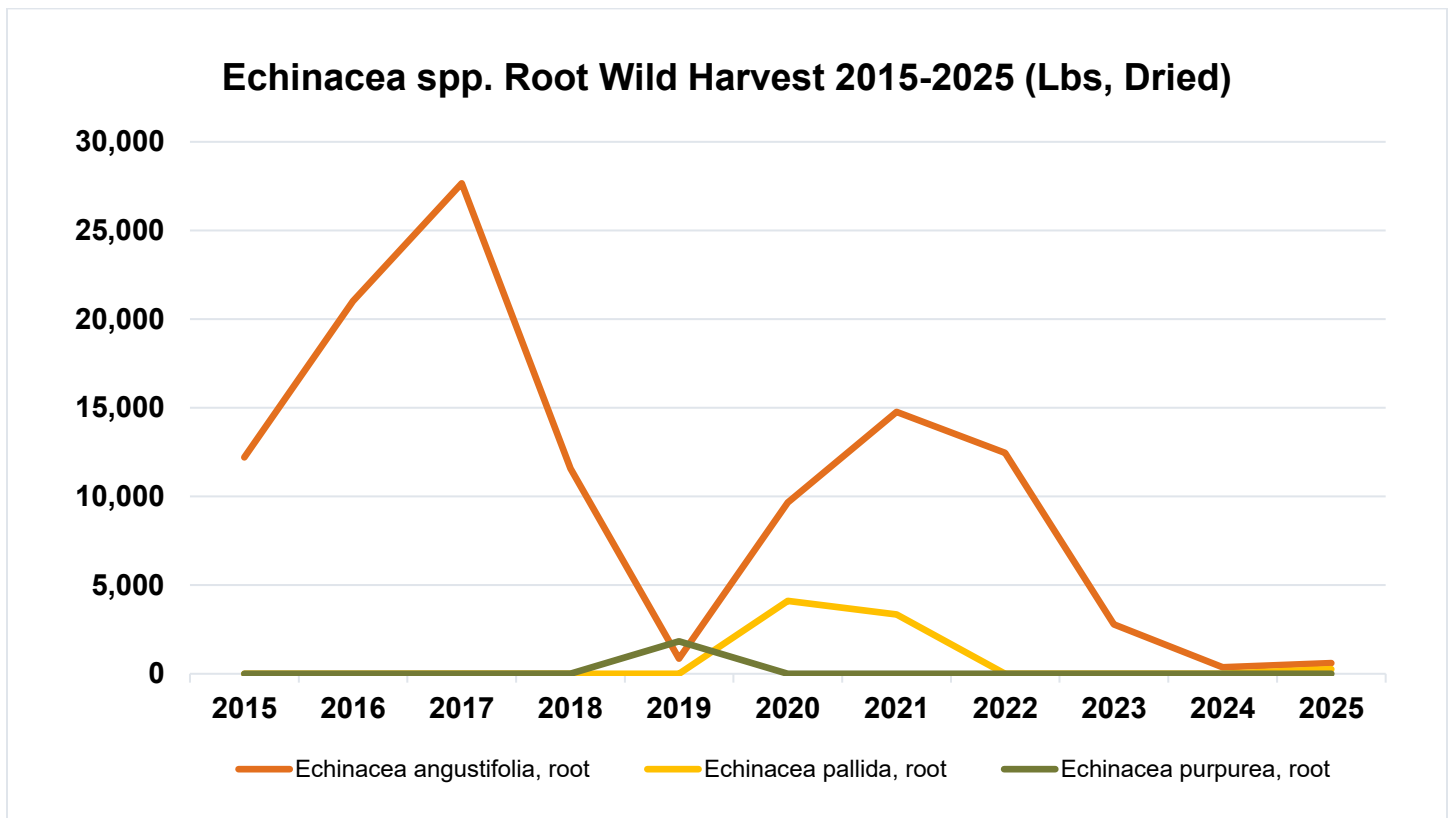


Figure 8

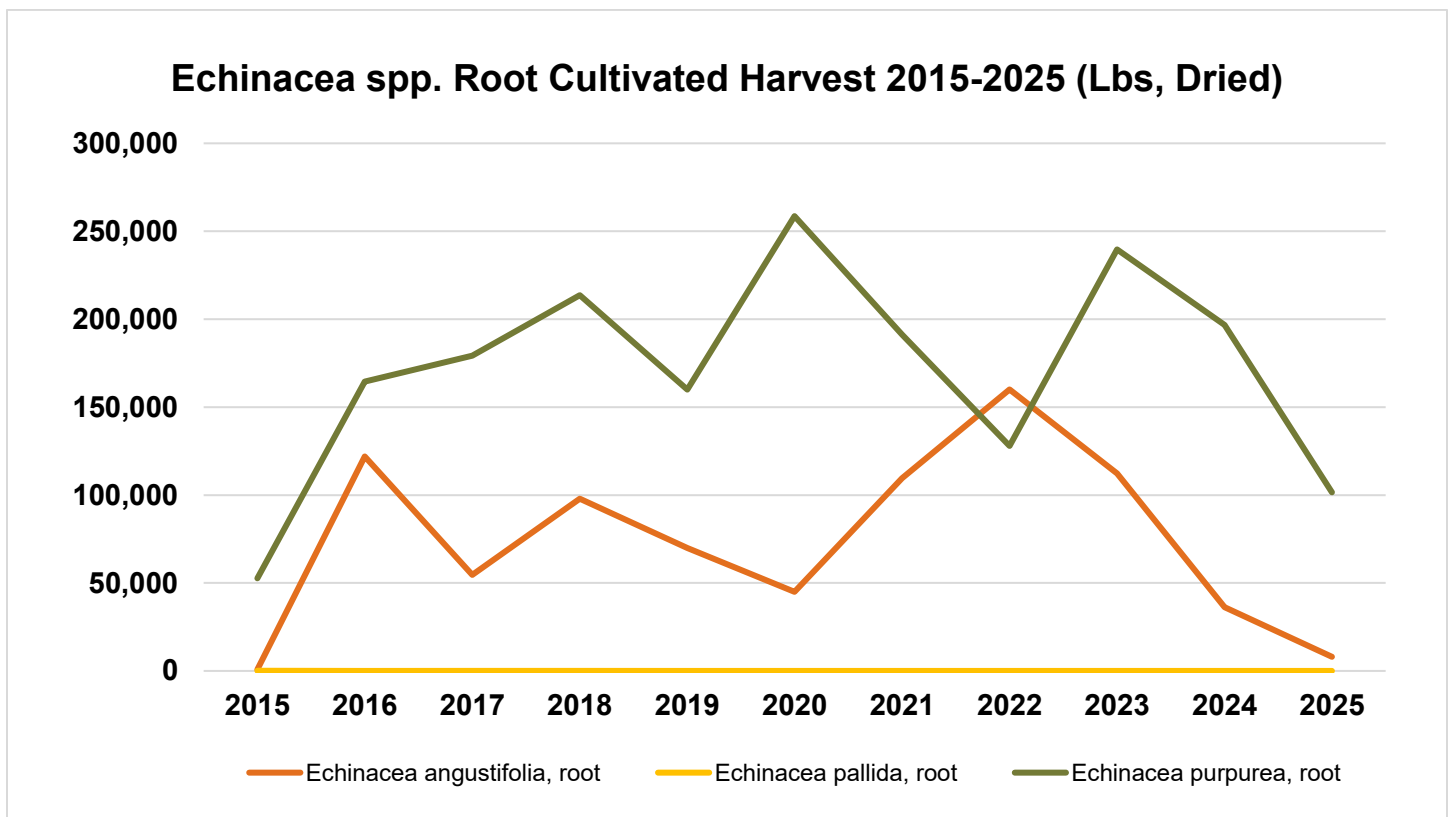


Figure 9

Because the majority of *Echinacea purpurea* entering commerce in the United States originates from cultivated rather than wild sources, **Figure 10** is included to represent cultivated *Echinacea purpurea* root and aerial parts separately. Reported harvest quantities for cultivated *Echinacea purpurea* root fluctuated throughout the reporting period, with increases through 2020, lower reported quantities during 2021 and 2022, a rebound in 2023, and lower reported quantities again in 2024 and 2025. Reported harvest of cultivated *Echinacea purpurea* aerial parts followed a similar pattern, increasing through 2020 before declining in 2021, partially recovering during 2022 and 2023, and decreasing during the final two survey years. According to industry experts, *Echinacea purpurea* is particularly prone to fluctuations associated with industry purchasing patterns related to inventory supply and market prices. It is not known whether pandemic-related supply and demand factors contributed to fluctuations in reported harvests of cultivated *Echinacea purpurea* aerial parts during the survey period; however, reported harvest quantities increased during the pandemic years before declining in the subsequent survey years. As discussed in the Response Rate and Limitations section, changes in respondent participation should also be considered when interpreting reported harvest quantities for recent survey years.

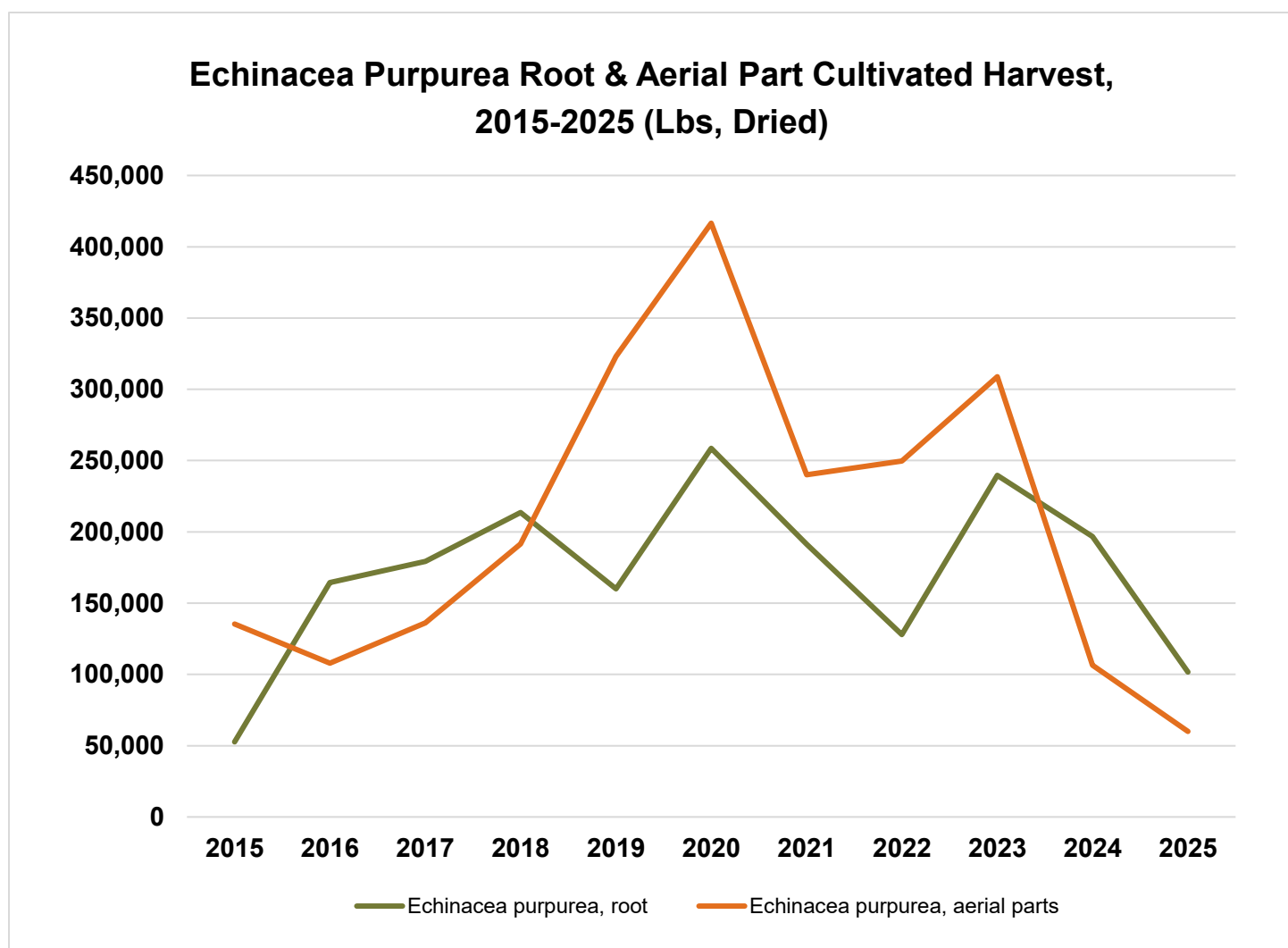


Figure 10

Saw Palmetto

Underreporting of the saw palmetto berry harvest has been considered a certainty from the first administration of the AHPA Tonnage Survey, and this commodity has consistently presented challenges for data collection due to the relatively small number of aggregators and the nature of the supply chain. Beginning in 2014, AHPA adopted a revised approach to data collection that included soliciting whole-industry production estimates from primary producers and aggregators. The numbers reported for the current survey years represent the best available estimate of total annual production. **Figure 10** shows reported saw palmetto production converted to dried U.S. tons using a 3:1 fresh-to-dried conversion to facilitate annual comparison from 2016 through 2025.

Reported production continued to decline in 2024 and reached its lowest level of the reporting period in 2025. According to a saw palmetto industry stakeholder, regulatory changes implemented in Florida over recent harvest seasons, including changes related to permitting, expanded traceability requirements, increased documentation, and stricter enforcement, are likely to have affected harvesting activity. The stakeholder also noted that limited berry availability and reduced availability of the seasonal harvesting workforce during the 2025 harvest likely further contributed to lower reported production.

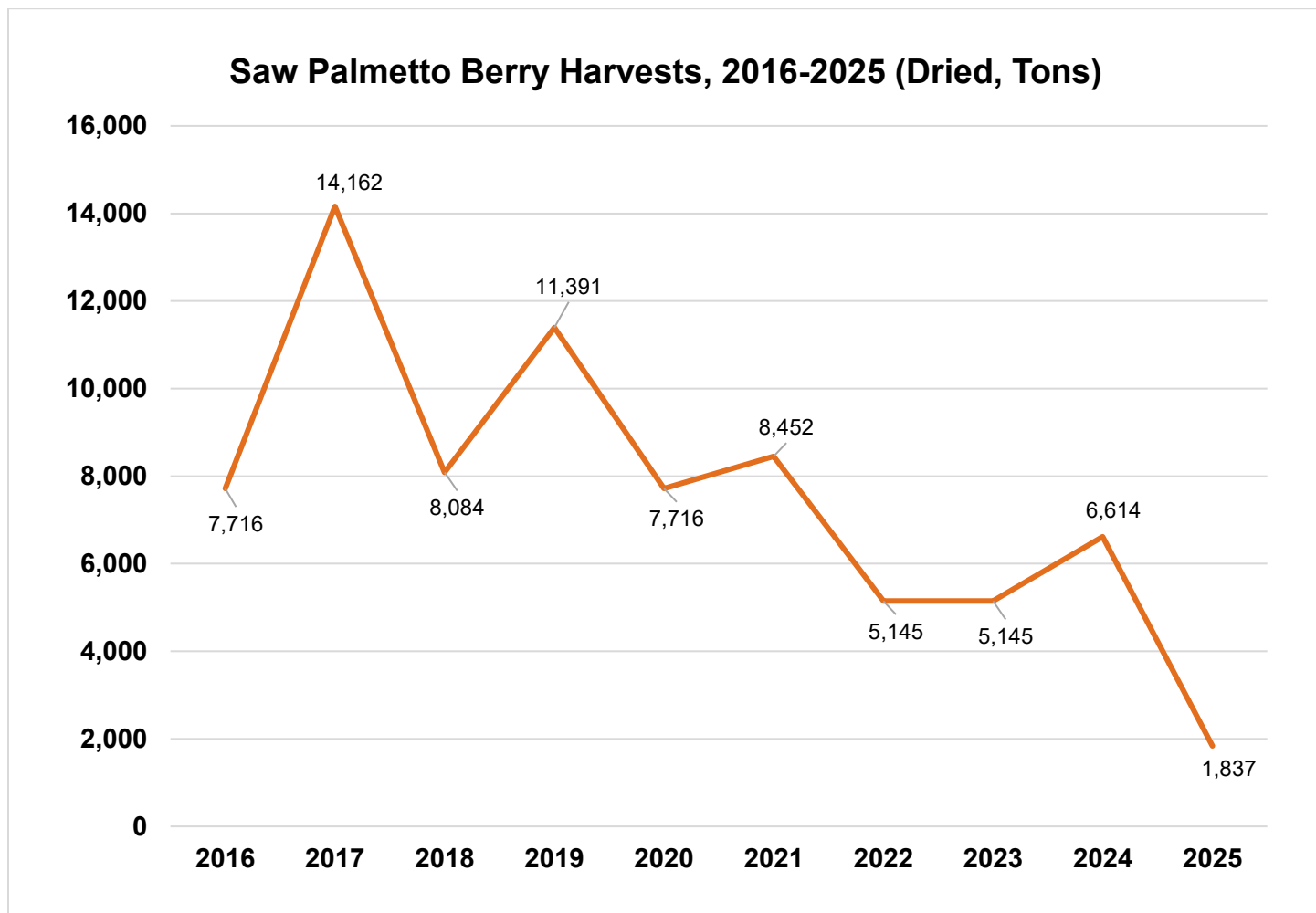


Figure 11

Harvest data on cultivated and wild dried harvests of all other surveyed commodities can be seen in **Table 1**.

Certified Organic

Tonnage of harvested materials that were certified organic in conformity with the USDA National Organic Program have been collected for this survey since 2014. As in previous surveys, respondents were asked to identify the portion of reported harvests that was certified organic under the USDA National Organic Program. Fresh weights, where reported in previous survey years, were converted to dried-weight equivalents to facilitate comparison among commodities and survey years. **Table 2** summarizes the reported certified organic quantities for each commodity.

Certified organic production during the 2024–2025 survey period continued to be concentrated among cultivated botanicals, with certified organic harvests reported for a broad range of commercially cultivated species. Fewer wild-harvested commodities were reported as certified organic, and reported quantities were generally significantly smaller.

Comparison of the certified organic and total production data indicates that certified organic production comprised more than 90 percent of the reported production for several of the industry's largest cultivated botanical commodities during the 2024–2025 survey period. Peppermint aerial parts, spearmint aerial parts, catnip aerial parts, lemon balm aerial parts, dandelion root, marshmallow root, nettle leaf, and Echinacea purpurea root each had certified organic production representing between 90 to 100 percent of their total reported cultivated production, demonstrating that certified organic production is a primary method of production for many of North America's highest-volume cultivated botanicals.

Reported certified organic wild-harvest quantities fluctuated from year to year, but the quantities reported for 2024 and 2025 were among the lowest observed since certified organic data collection began. Differences in survey response for the current survey period should be considered when interpreting year-to-year changes, particularly for native North American botanicals which traditionally have at least some portion of their reported production occurring as wild harvest.

Reported certified organic quantities varied considerably among commodities and between survey years. Commodity-specific annual values for the 2016–2025 reporting years are presented in **Table 2**.

Table 3: Portion of Aggregate Harvest that was Certified Organic for 2016–2025 (In Dried Pounds)

Article of commerce		alfalfa leaf	American ginseng root	angelica root	arnica any part	artichoke leaf	astragalus	ashwagandha root	ashwagandha aerial parts	bee balm aerial parts	bethroot root	black cherry bark
Latin binomial		<i>Medicago sativa</i>	<i>Panax quinquefolius</i>	<i>Angelica archangelica</i>	<i>Arnica</i> spp.	<i>Cynara cardunculus</i> var. <i>scolymus</i>	<i>Astragalus membranaceus</i>	<i>Withania somnifera</i>	<i>Withania somnifera</i>	<i>Monarda fistulosa</i>	<i>Trillium erectum</i>	<i>Prunus serotina</i>
2025	cult. wild	70,029 0	2,288 N/S	2,552 0	16 0	9,987 0	1,287 0	39,237 0	4,991 0	2,518 0	0 116	0 0
2024	cult. wild	77,144 0	1,977 N/S	773 0	347 0	2,353 0	2,488 0	4,541 0	9,272 0	0 0	0 0	0 70
2023	cult. wild	130,618 0	945 N/S	1,359 0	345 0	3,426 0	716 0	18,359 0	1,653 0	642 0	0 0	0 0
2022	cult. wild	212,700 0	542 N/S	2,463 0	183 0	7,475 0	982 0	30,133 0	0 0	286 0	0 0	30 0
2021	cult. wild	107,646 0	914 N/S	650 0	138 0	5,934 0	1,564 0	13,925 0	3,455 0	304 0	0 0	83 2,600
2020	cult. wild	N/S	N/S	N/S	527 0	N/S	N/S	N/S	N/S	136 0	0 0	7 25,006
2019	cult. wild	N/S	N/S	N/S	350 0	N/S	N/S	N/S	N/S	0 0	0 0	0 6,908
2018	cult. wild	N/S	N/S	N/S	414 0	N/S	N/S	N/S	N/S	173 0	0 674	3 15,490
2017	cult. wild	268,971 0	N/S	N/S	756 28	N/S	N/S	N/S	N/S	N/S	0 0	0 9,500
2016	cult. wild	326,259 0	N/S	N/S	300 15	N/S	N/S	N/S	N/S	N/S	0 0	0 6,700

[Table continues on next page]

Note: N/S indicates that this commodity was not included in the survey for the year indicated.

* Any reported fresh weights for survey years 2016-2020 are converted to dried weight and included in this table.

Table 3: Portion of Aggregate Harvest that was Certified Organic for 2016–2025 (In Dried Pounds) [continued]

Article of commerce		black chokeberry fruit	black cohosh root	blessed thistle	black walnut hull	bloodroot root	blue cohosh root	blue flag root	blue vervain aerial parts	boneset aerial parts	borage aerial parts	American bugleweed aerial parts
Latin binomial		<i>Aronia melanocarpa</i>	<i>Actea racemosa</i>	<i>Centaurea benedicta</i>	<i>Juglans nigra</i>	<i>Sanguinaria canadensis</i>	<i>Caulophyllum thalictroides</i>	<i>Iris virginica</i>	<i>Verbena hastata</i>	<i>Eupatorium perfoliatum</i>	<i>Borago officinalis</i>	<i>Lycopus americanus</i>
2025	cult. wild	0 0	0 6,382	5,826 0	0 0	0 0	0 0	345 0	4,319 0	1,342 0	1,139 0	1,200 0
2024	cult. wild	0 0	0 12,884	6,287 0	0 0	0 0	0 0	1,809 0	2,006 0	1,051 0	543 0	0 0
2023	cult. wild	0 0	97 30,191	2,915 0	0 0	0 0	0 0	1,366 0	7,775 0	517 0	662 0	394 0
2022	cult. wild	0 0	199 2,943	2,552 0	0 0	0 0	0 0	1,190 0	17,928 0	1,607 0	641 0	0 0
2021	cult. wild	0 0	1,631 20,309	2,412 0	0 0	0 0	0 0	1,358 0	5,235 0	3,159 0	525 0	17 0
2020	cult. wild	0 0	2,000 0	N/S	17 903	261 0	0 0	N/S	N/S	N/S	N/S	N/S
2019	cult. wild	0 5,000	1,915 70	N/S	17 1,827	0 0	0 0	N/S	N/S	N/S	N/S	N/S
2018	cult. wild	0 0	1,015 0	N/S	17 254	0 0	0 0	N/S	N/S	N/S	N/S	N/S
2017	cult. wild	0 0	13 6,487	N/S	60 0	176 0	180 0	N/S	N/S	N/S	N/S	N/S
2016	cult. wild	0 0	54 4,940	N/S	6,519 0	423 0	73 500	N/S	N/S	N/S	N/S	N/S

[Table continues on next page]

Note: N/S indicates that this commodity was not included in the survey for the year indicated.

* Any reported fresh weights for survey years 2016–2020 are converted to dried weight and included in this table.

Table 3: Portion of Aggregate Harvest that was Certified Organic, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		European bugleweed aerial parts	bugleweed aerial parts	burdock root	butterfly weed root	calendula flower	California poppy aerial parts	cascara sagrada bark	catnip aerial parts	cayenne fruit	celandine whole plant	chaga conk
Latin binomial		<i>Lycopus europaeus</i>	<i>Lycopus virginicus</i>	<i>Arctium lappa</i>	<i>Asclepias tuberosa</i>	<i>Calendula officinalis</i>	<i>Eschscholzia californica</i>	<i>Frangula purshiana</i> ¹	<i>Nepeta cataria</i>	<i>Capsicum annuum</i> L. var. <i>annuum</i>	<i>Chelidonium majus</i>	<i>Inonotus obliquus</i>
2025	cult. wild	0 0	0 0	81,960 0	0 0	2,363 0	5,741 0	0 0	184,841 0	0 0	0 0	0 0
2024	cult. wild	0 0	0 0	85,216 0	0 0	2,021 0	6,922 0	0 0	418,055 0	0 0	0 0	0 0
2023	cult. wild	0 0	0 1,240	40,893 0	124 0	2,495 0	6,325 0	0 0	345,468 0	0 0	40 0	0 0
2022	cult. wild	0 0	0 6,480	79,837 0	38 0	2,089 0	7,243 0	0 3,500	670,328 0	66 0	58 0	0 0
2021	cult. wild	1,998 0	0 5,425	47,030 0	117 0	1,583 0	5,620 0	0 1,120	601,695 0	0 0	10 0	0 0
2020	cult. wild	N/S	N/S	N/S	N/S	N/S	663 500	0 0	N/S	N/S	N/S	0 7,975
2019	cult. wild	N/S	N/S	N/S	N/S	N/S	3,013 0	80 4,531	N/S	N/S	N/S	0 2,000
2018	cult. wild	N/S	N/S	N/S	N/S	N/S	1,178 0	80 4,641	N/S	N/S	N/S	0 4,992
2017	cult. wild	N/S	N/S	39,746 0	N/S	N/S	N/S	0 2,500	N/S	N/S	N/S	N/S
2016	cult. wild	N/S	N/S	3,180 0	N/S	N/S	N/S	0 2,500	N/S	N/S	N/S	N/S

[Table continues on next page]

Note: N/S indicates that this commodity was not included in the survey for the year indicated.

¹ Also known as *Rhamnus purshiana*.

* Any reported fresh weights for survey years 2016-2020 are converted to dried weight and included in this table.

Table 3: Portion of Aggregate Harvest that was Certified Organic, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		chamomile flower	chaparral leaf	chaste tree fruit	chickweed aerial parts	chokecherry fruit	comfrey root	comfrey aerial parts	corn silk silk	Culver's root	damiana leaf	dandelion root
Latin binomial		<i>Matricaria chamomilla</i>	<i>Larrea tridentata</i>	<i>Vitex agnus-castus</i>	<i>Stellaria media</i>	<i>Prunus virginiana</i>	<i>Symphytum officinale</i>	<i>Symphytum officinale</i>	<i>Zea mays</i>	<i>Veronicastrum virginicum</i>	<i>Turnera diffusa</i>	<i>Taraxacum officinale</i>
2025	cult. wild	4,004 0	0 0	235 0	11 0	0 0	4,479 0	1,412 0	206 0	0 0	201 0	260,076 0
2024	cult. wild	2,379 0	0 0	250 0	0 0	0 0	1,698 0	1,106 0	184 0	0 0	115 0	217,952 0
2023	cult. wild	2,072 0	0 0	200 0	111 0	5,137 0	127 0	486 0	55 0	12 0	199 0	118,457 0
2022	cult. wild	2,138 0	0 0	180 0	114 0	3,250 0	85 0	208 0	50 0	12 0	155 0	181,399 0
2021	cult. wild	642 0	0 0	180 0	139 0	0 0	159 0	96 0	4,297 0	12 0	155 0	103,334 0
2020	cult. wild	N/S	0 0	N/S	N/S	0 0	N/S	N/S	N/S	N/S	0 0	N/S
2019	cult. wild	N/S	0 0	N/S	N/S	0 0	N/S	N/S	N/S	N/S	165 0	N/S
2018	cult. wild	N/S	0 0	N/S	N/S	0 0	N/S	N/S	N/S	N/S	165 0	N/S
2017	cult. wild	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	880 0	N/S
2016	cult. wild	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	250 0	N/S

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Table 3: Portion of Aggregate Harvest that was Certified Organic, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		dandelion leaf	<i>Echinacea angustifolia</i> root	<i>Echinacea angustifolia</i> aerial parts	<i>Echinacea pallida</i> root	<i>Echinacea purpurea</i> root	<i>Echinacea purpurea</i> aerial parts	<i>eclipta</i> aerial parts	<i>elecampane</i> root	elderberry berry	elderberry flower	feverfew aerial parts	ginkgo leaf
Latin binomial		<i>Taraxacum officinale</i>	<i>Echinacea angustifolia</i>	<i>Echinacea angustifolia</i>	<i>Echinacea pallida</i>	<i>Echinacea purpurea</i>	<i>Echinacea purpurea</i>	<i>Eclipta prostrata</i>	<i>Inula helenium</i>	<i>Sambucus nigra</i>	<i>Sambucus nigra</i>	<i>Tanacetum parthenium</i>	<i>Ginkgo biloba</i>
2025	cult. wild	21,848 0	8,094 0	7,315 0	0 0	101,388 0	59,801 0	887 0	7,753 0	297 0	100 0	6,658 0	7,591 0
2024	cult. wild	9,762 0	36,287 0	0 0	0 0	196,646 0	106,466 0	906 0	3,859 0	165 0	0 0	3,329 0	5,379 0
2023	cult. wild	26,375 0	112,360 0	29,700 0	0 0	239,553 0	308,879 0	3,487 0	7,978 0	598 0	0 0	4,615 0	9,118 0
2022	cult. wild	55,379 0	154,486 0	42,679 0	0 0	118,938 0	249,608 0	1,403 0	9,543 0	1,336 0	0 0	5,505 0	5,808 0
2021	cult. wild	22,679 0	107,655 0	28,420 0	0 0	191,227 0	239,587 0	1,357 0	5,178 2,640	17 0	0 0	4,659 0	7,905 0
2020	cult. wild	N/S	30,201 7,573	24,6600	0 0	253,155 0	416,535 0	N/S	N/S	1041 0	0 0	N/S	N/S
2019	cult. wild	N/S	50,103 0	14,032 0	0 0	155,096 0	323,056 0	N/S	N/S	3238 0	0 2228	N/S	N/S
2018	cult. wild	N/S	85,989 0	19,040 0	0 0	213,601 0	191,420 0	N/S	N/S	1546 0	10 835	N/S	N/S
2017	cult. wild	N/S	54,548 0	35,300 0	20 0	179,138 0	136,134 22,901	N/S	N/S	N/S	N/S	N/S	N/S
2016	cult. wild	N/S	122,024 0	28,340 0	0 0	164,437 0	196,877 0	N/S	N/S	N/S	N/S	N/S	N/S

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Note: N/S indicates that this commodity was not included in the survey for the year indicated.

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Table 3: Portion of Aggregate Harvest that was Certified Organic, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		goldenseal root	goldenseal leaf	hawthorn fruit	holy basil aerial parts	hops flower	horehound aerial parts	hydrangea root	hyssop aerial parts	lavender flower	lemon balm aerial parts	lobelia aerial parts	marshmallow root
Latin binomial		<i>Hydrastis canadensis</i>	<i>Hydrastis canadensis</i>	<i>Crataegus</i> spp.	<i>Ocimum tenuiflorum</i>	<i>Humulus lupulus</i>	<i>Marrubium vulgare</i>	<i>Hydrangea arborescens</i>	<i>Hyssopus officinalis</i>	<i>Lavandula angustifolia</i>	<i>Melissa officinalis</i>	<i>Lobelia inflata</i>	<i>Althea officinalis</i>
2025	cult. wild	1,500 0	0 0	572 0	1,742 0	3,024 0	1,296 0	0 0	3,837 0	7,967 0	16,876 0	713 0	117,556 0
2024	cult. wild	2,260 1,400	0 0	407 0	6,340 0	1,280 0	2,036 0	0 0	1,568 0	226 0	13,267 0	31 0	152,223 0
2023	cult. wild	24 3,009	0 0	1,328 0	2,224 0	908 0	606 0	0 0	1,113 0	1,528 0	16,525 0	280 0	62,746 536
2022	cult. wild	70 4,213	0 0	4,813 0	500 0	1,577 0	545 0	0 0	1,141 0	1,591 0	15,274 0	1,255 0	8,292 0
2021	cult. wild	0 1,963	0 6	3,821 0	2,938 0	791 0	485 0	0 0	3,946 0	683 0	17,103 0	151 0	62,111 0
2020	cult. wild	133 3,131	443 0	N/S	N/S	N/S	N/S	0 350	N/S	N/S	N/S	N/S	N/S
2019	cult. wild	443 2,981	443 1,977	N/S	N/S	N/S	N/S	0 0	N/S	N/S	N/S	N/S	N/S
2018	cult. wild	433 0	0 0	N/S	N/S	N/S	N/S	0 0	N/S	N/S	N/S	N/S	N/S
2017	cult. wild	1,604 0	0 0	N/S	N/S	N/S	N/S	1,184 0	N/S	N/S	N/S	N/S	N/S
2016	cult. wild	3,816 0	520 0	N/S	N/S	N/S	N/S	165 0	N/S	N/S	N/S	N/S	N/S

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Note: N/S indicates that this commodity was not included in the survey for the year indicated.

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Table 3: Portion of Aggregate Harvest that was Certified Organic, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		meadowsweet aerial parts	motherwort aerial parts	mountain maple bark	mugwort aerial parts	mullein root	mullein leaf	nettle leaf	oat immature seed	oregano aerial parts	Oregon grape root	oshá root	partridge berry aerial parts
Latin binomial		<i>Filipendula ulmaria</i>	<i>Leonurus cardiaca</i>	<i>Acer spicatum</i>	<i>Artemesia vulgaris</i>	<i>Verbascum thapsus</i>	<i>Verbascum thapsus</i>	<i>Urtica dioica</i>	<i>Avena sativa</i>	<i>Origanum vulgare</i>	<i>Berberis aquifolium</i>	<i>Ligusticum porteri</i>	<i>Mitchella repens</i>
2025	cult. wild	0 0	6,930 0	0 0	2,976 0	7,665 0	493 0	115,355 0	12,536 0	1,994 0	344 400	215 0	0 220
2024	cult. wild	4,233 0	2,175 0	0 0	1,253 0	4,861 0	2,175 0	113,886 0	8,787 0	1,478 0	578 1,380	110 0	0 165
2023	cult. wild	266 0	5,828 0	0 0	4,406 0	1,611 0	4,164 0	100,857 0	35,754 0	3,610 0	300 1,305	377 0	0 0
2022	cult. wild	298 0	4,869 0	0 0	10,671 0	2,540 0	483 0	105,5870	78,560 0	2,012 0	1,180 3,000	112 0	20 0
2021	cult. wild	247 0	4,418 0	0 0	9,494 0	1,824 0	598 0	104,133 0	57,153 0	1,757 0	300 3,600	62 0	0 0
2020	cult. wild	N/S	N/S	0 0	N/S	N/S	N/S	N/S	N/S	N/S	7 3,319	0 0	0 0
2019	cult. wild	N/S	N/S	0 0	N/S	N/S	N/S	N/S	N/S	N/S	357 3,071	0 0	0 0
2018	cult. wild	N/S	N/S	0 0	N/S	N/S	N/S	N/S	N/S	N/S	507 43,509	0 0	0 0
2017	cult. wild	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0 3,000	0 0	0 0
2016	cult. wild	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0 3,000	0 0	0 0

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Note: N/S indicates that this commodity was not included in the survey for the year indicated.

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Table 3: Portion of Aggregate Harvest that was Certified Organic, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		passionflower aerial parts	peppermint aerial parts	pipsissewa aerial parts	plantain leaf	poke root	pulsatilla aerial parts	red clover aerial parts	rosemary aerial parts	rue aerial parts	sage aerial parts	sarsaparilla rhizome	saw palmetto fruit
Latin binomial		<i>Passiflora incarnata</i>	<i>Mentha × piperita</i>	<i>Chimaphila umbellata</i>	<i>Plantago major</i>	<i>Phytolacca americana</i>	<i>Pulsatilla vulgaris</i>	<i>Trifolium pratense</i>	<i>Rosmarinus officinalis</i>	<i>Ruta graveolens</i>	<i>Salvia officinalis</i>	<i>Smilax spp.</i>	<i>Serenoa repens</i>
2025	cult. wild	1,055 0	731,729 0	1,971 0	12,405 0	1,888 0	0 0	15,404 0	376 0	2,939 0	2,081 0	0 0	0 0
2024	cult. wild	3,014 0	690,440 0	0 0	1,660 0	1,456 0	0 0	7,315 0	509 0	3,087 0	1,003 0	0 0	100 4,000
2023	cult. wild	2,574 0	476,803 0	0 0	6,101 0	843 20	20 0	2,525 0	991 0	2,889 0	2,892 0	55,116 0	0 800
2022	cult. wild	2,870 0	418,128 0	0 0	6,074 0	835 0	0 0	1,098 0	622 0	2,239 0	5,328 0	0 0	0 800
2021	cult. wild	2,746 0	18,263 0	0 0	2,697 0	450 8	11 0	1,477 0	143,334 0	1,246 0	5,125 0	0 0	0 3,000
2020	cult. wild	1,335 0	N/S	190 227	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0
2019	cult. wild	4,182 0	N/S	175 112	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	5,000
2018	cult. wild	3,925 0	N/S	0 862	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	5,000
2017	cult. wild	9,806 0	N/S	0 623	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0
2016	cult. wild	6,217 0	N/S	0 564	N/S	N/S	N/S	N/S	N/S	N/S	N/S	N/S	0

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Note: N/S indicates that this commodity was not included in the survey for the year indicated.

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Table 3: Portion of Aggregate Harvest that was Certified Organic, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		shepherd's purse aerial parts	skullcap aerial parts	slippery elm bark	spearmint aerial parts	spilanthes aerial parts	St. John's wort flowering tops	stone root root	sweet wormwood aerial parts	thyme aerial parts	usnea lichen	valerian root	violet aerial parts
Latin binomial		<i>Capsella bursa-pastoris</i>	<i>Scutellaria lateriflora</i>	<i>Ulmus rubra</i>	<i>Mentha spicata</i>	<i>Acmella oleracea</i>	<i>Hypericum perforatum</i>	<i>Collinsonia canadensis</i>	<i>Artemisia annua</i>	<i>Thymus vulgaris</i>	<i>Usnea</i> spp.	<i>Valeriana officinalis</i>	<i>Viola tricolor</i>
2025	cult. wild	200 0	82,624 0	10,684 0	367,867 0	589 0	930 0	158 300	3,711 0	946 0	0 2,940	37,946 0	0 0
2024	cult. wild	105 0	70,865 75	0 38	227,313 0	138 0	623 0	618 0	2,500 0	1,125 0	1,990 0	54,625 0	0 0
2023	cult. wild	202 0	172,286 0	0 19,482	101,436 0	1,025 0	1,109 0	35 82	2,875 0	938 0	0	147,486 0	0 0
2022	cult. wild	109 0	57,211 0	0 13,924	204,548 0	1,188 0	2,627 0	28 0	3,527 0	975 0	0	65,755 0	471 0
2021	cult. wild	186 0	70,995 0	0 29,583	103,699 0	1,392 0	858 0	47 60	1,823 0	809 0	0	50,854 0	62 0
2020	cult. wild	N/S	45,474 0	6,184 15,744	N/S	N/S	N/S	0 0	N/S	N/S	0 0	N/S	N/S
2019	cult. wild	N/S	87,069 0	13,638 11,744	N/S	N/S	N/S	0 0	N/S	N/S	0 874	N/S	N/S
2018	cult. wild	N/S	104,360 0	8,139 16,654	N/S	N/S	N/S	0 0	N/S	N/S	0 24	N/S	N/S
2017	cult. wild	N/S	N/S	11,000 13,150	N/S	N/S	N/S	N/S	N/S	N/S	0 0	N/S	N/S
2016	cult. wild	N/S	N/S	1,850 13,943	N/S	N/S	N/S	N/S	N/S	N/S	0 0	N/S	N/S

[Table continues on next page]

Note: N/S indicates that this commodity was not included in the survey for the year indicated.

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Table 3: Portion of Aggregate Harvest that was Certified Organic, 2016–2025 (In Dried Pounds) [continued]

Article of commerce		wild yam root	witch hazel bark	witch hazel twigs	witch hazel leaf	white sage aerial parts	wood betony leaf	wormwood aerial parts	yarrow leaf and flower	yellow dock root	yerba mansa root	yerba santa leaf
Latin binomial		<i>Dioscorea villosa</i>	<i>Hamamelis virginiana</i>	<i>Hamamelis virginiana</i>	<i>Hamamelis virginiana</i>	<i>Salvia apiana</i>	<i>Stachys officinalis</i>	<i>Artemisia absinthium</i>	<i>Achillea millefolium</i>	<i>Rumex crispus</i>	<i>Anemopsis californica</i>	<i>Eriodictyon spp.</i>
2025	cult. wild	0 0	0 0	0 0	0 0	33 0	0 0	4,787 2,193	10,474 0	594 786	300 0	1,524 0
2024	cult. wild	0 1,000	0 0	0 0	0 0	87 0	0 0	2,325 0	4,872 0	2,601 73	0 0	0 0
2023	cult. wild	0 0	0 0	0 0	300 204	174 0	146 0	10,494 0	10,317 0	3,007 0	0 0	0 0
2022	cult. wild	55 0	0 0	0 0	20 0	1,566 0	93 0	14,383 0	14,383 0	3,636 0	0 0	0 0
2021	cult. wild	50 0	0 0	0 0	200 0	2,200 0	88 0	5,875 0	5,875 0	2,737 0	0 0	0 0
2020	cult. wild	0 0	0 0	0 0	0 0	N/S	N/S	N/S	2,702 0	N/S	0 0	0 0
2019	cult. wild	18 874	0 0	0 0	0 0	N/S	N/S	N/S	1,538 0	N/S	0 0	0 0
2018	cult. wild	0 0	0 0	0 0	0 0	N/S	N/S	N/S	1,457 0	N/S	0 0	0 0
2017	cult. wild	13 1,425	0 1,400	0 0	0 1,500	N/S	N/S	N/S	N/S	N/S	0 0	0 0
2016	cult. wild	15 0	0 1,189	0 0	0 2,458	N/S	N/S	N/S	N/S	N/S	0 0	0 0

Note: N/S indicates that this commodity was not included in the survey for the year indicated.

* Any reported fresh weights for survey years 2016–2020 are converted to dried weight and included in this table.

Forest Farmed Data

AHPA began collecting harvest data for botanical materials produced using forest farming techniques starting in 2018. The following definition was provided to survey respondents: Forest farming is the cultivation or management of specialty crops in an established or managed forest. Respondents were asked to report harvest weights of forest farmed raw materials by any of the following three techniques along the continuum of forest management intensities: “management” of established wild or once wild populations; “wild simulation”—a low-input method with minimal alterations including planned site preparation, planting, and tending; and “woods grown”—more intensively established and managed systems of cultivation involving prepared beds and use of agricultural inputs. **Table 4** displays harvest data for reported dried forest farmed materials. For the forest farmed portion of the 2024–2025 survey, respondents were provided with an open-ended, fillable table to record forest farmed commodities rather than being limited to the species listed in the survey matrix. As a result, several additional species were reported that do not appear elsewhere in this report, including black haw (*Viburnum prunifolium*) root, cramp bark (*Viburnum opulus*) bark, devil's club (*Oplopanax horridus*) bark, Japanese knotweed (*Polygonum cuspidatum*) root, jujube (*Ziziphus jujuba*) fruit, juniper (*Juniperus* spp.) berry, mimosa (*Albizia julibrissin*) bark, Pacific yew (*Taxus brevifolia*) branch tips, redroot (*Ceanothus americanus*) root, and wild rose (*Rosa nutkana*) flower. Commodities with no reported forest farmed harvest are not included in the table.



Stoneroot
(*Collinsonia canadensis*)
Credit: Helen Metzman

Table 4: Portion of Aggregate Harvest that was Forest Farmed for DRIED Plants, 2018–2023 (In Pounds)

Article of commerce		black cohosh root	black haw root	bloodroot root	cramp bark bark	devil's club bark	elderberry berry	elderberry flower	goldenseal root	hawthorn leaf & flower	Japanese knotweed root
Latin binomial		<i>Actaea racemosa</i>	<i>Viburnum prunifolium</i>	<i>Sanguinaria canadensis</i>	<i>Viburnum opulus</i>	<i>Oplopanax horridus</i>	<i>Sambucus nigra</i>	<i>Sambucus nigra</i>	<i>Hydrastis canadensis</i>	<i>Crataegus</i> spp.	<i>Polygonum cuspidatum</i>
2025	Managed	0	0	0	398	0	0	0	0	1668	1012
	Wild Simulated	0	0	0	0	0	0	0	0	0	0
	Woods Grown	0	0	0	0	0	0	0	0	0	0
2024	Managed	0	0	0	0	0	0	0	0	0	770
	Wild Simulated	0	0	0	0	0	0	0	0	0	0
	Woods Grown	0	0	0	0	309	0	0	0	0	0
2023	Managed	0	1,836	0		0	0	0	0	N/S	N/S
	Wild Simulated	0	47	0	N/S	0	0	0	47		
	Woods Grown	0	0	0		300	0	0	1,642		
2022	Managed	0	0	0		0	0	0	0	N/S	N/S
	Wild Simulated	0	0	0	N/S	0	0	0	47		
	Woods Grown	0	0	0		0	0	0	1,508		
2021	Managed	0	0	0		0	0	0	0	N/S	N/S
	Wild Simulated	0	0	0	N/S	0	0	0	47		
	Woods Grown	0	0	0		0	0	0	1,307		
2020	Managed	860		0			1,020	0	0	N/S	N/S
	Wild Simulated	2,000	N/S	0	N/S	N/S	0	0	25		
	Woods Grown	0		5			0	0	0		
2019	Managed	442		0			1,630	2,230	0	N/S	N/S
	Wild Simulated	1,915	N/S	0	N/S	N/S	0	0	37		
	Woods Grown	0		6			0	0	0		
2018	Managed	0		0			16	835	0	N/S	N/S
	Wild Simulated	1,015	N/S	0	N/S	N/S	0	0	130		
	Woods Grown	0		0			0	0	0		

Table 4: Portion of Aggregate Harvest that was Forest Farmed for DRIED Plants, 2018–2023 (In Pounds)

Article of commerce		jujube fruit	juniper berry	mimosa bark	Pacific yew branch tips	red root root	slippery elm bark	Solomon's seal root	stoneroot root	wild cherry bark	wild rose flower	wild yam root
Latin binomial		<i>Ziziphus jujuba</i>		<i>Albizia julibrissin</i>	<i>Taxus brevifolia</i>	<i>Ceanothus americanus</i>	<i>Ulmus rubra</i>	<i>Polygonatum biflorum</i>	<i>Collinsonia canadensis</i>	<i>Prunus serotina</i>	<i>Rosa nutkana</i>	<i>Dioscorea villosa</i>
2025	Managed	1100	0	1782	0	0	0	0	0	0	0	0
	Wild Simulated	0	0	0	0	0	0	0	0	0	0	0
	Woods Grown	0	30	0	2,977	0	0	0	0	0	0	0
2024	Managed	2400	0	1200	0	0	0	0	0	0	0	0
	Wild Simulated	0	0	0	0	0	0	0	0	0	0	0
	Woods Grown	0	20	0	0	0	0	0	0	0	408	0
2023	Managed	0	N/S	0	0	415	0	0	0	1,400	N/S	80
	Wild Simulated	0		0	0	47	0	0	35	47		47
	Woods Grown	0		0	3,862	0	0	0	0	0		0
2022	Managed	0	N/S	0	0	0	0	0	0	1,200	N/S	490
	Wild Simulated	0		0	0	0	0	0	28	47		4
	Woods Grown	0		0	4,148	0	0	0	0	0		0
2021	Managed	0	N/S	0	0	0	0	0	0	1,200	N/S	0
	Wild Simulated	0		0	0	0	0	0	47	47		0
	Woods Grown	0		0	4,683	0	0	0	0	0		0
2020	Managed	N/S	N/S	N/S	N/S	N/S	560	0	0	0	N/S	0
	Wild Simulated						6,184	40	62	0		0
	Woods Grown						0	0	0	0		0
2019	Managed	N/S	N/S	N/S	N/S	N/S	9,330	0	0	0	N/S	0
	Wild Simulated						0	0	86	0		0
	Woods Grown						7,216	0	0	0		25
2018	Managed	N/S	N/S	N/S	N/S	N/S	0	62	0	0	N/S	0
	Wild Simulated						1,875	0	100	0		0
	Woods Grown						0	0	0	0		0

Third Party Certification Participation by Companies

As in previous surveys, respondents were asked to identify the certification and standards programs in which their companies currently participate. The 2024–2025 survey also included new questions regarding certifications adopted since 2023 and factors that may limit participation in certification programs.

Certified Organic continued to be the certification most frequently reported by survey respondents, reflecting its ongoing importance within the North American botanical industry. Respondents also reported participation in Biodynamic Farm, B Corporation, Forest Grown Verified, Global Good Agricultural Practices (GlobalG.A.P.), Non-GMO Project (or similar), Regenerative Organic Certification (ROC), Fair For Life, FairWild, Sustainable Agriculture, and UEBT/UTTZZ Sustainable Herbal Tea certification programs.

An additional question included in the 2024–2025 survey asked respondents whether they had sought new certifications since 2023 in response to buyer requirements or market shifts. Several respondents indicated that they had pursued one or more new certifications since 2023, with Regenerative Organic Certification (ROC), FairWild, Fair for Life, UEBT, SQF, and Kosher certification identified among the certifications adopted in response to buyer requirements or changing market opportunities.

Respondents were also asked to identify any barriers their companies may have experienced in obtaining or maintaining certification. The most frequently cited barriers included the cost of certification, administrative and recordkeeping requirements, and the time required to obtain and maintain certification. Several respondents also indicated that certification decisions are influenced by customer demand, with some certifications pursued only when supported by sufficient market opportunity.

Alternative Farming Methods

Companies were asked whether they produce and/or source raw materials using any agriculture techniques that could be considered "alternative" or involve a sustainable management focus. For the purposes of this survey, alternative farming methods may be defined as a philosophy or farming technique and a systematic approach to farming intended to reduce agricultural pollution, enhance sustainability, and improve efficiency and profitability.

In order of response frequency, respondents indicated use of the following methods: regenerative agriculture, forest farming, biodynamic farming, and other agroforestry techniques. Several respondents indicated that they employ more than one of these production methods.

A text box was provided for respondents to identify any other alternative agriculture or sustainable management methods used by their companies. Write-in responses included AHPA Good Agricultural and Collection Practices (GACP), sustainable wild harvest protocols developed in cooperation with the U.S. Forest Service, biological soil amendments and natural soil treatments to reduce reliance on synthetic fertilizers and pesticides, extensive cover cropping, tissue culture propagation, agroforestry-managed crops, watershed restoration projects associated with botanical production, and naturally grown production systems without added inputs.

Survey of Producer Experiences

To provide additional context for the quantitative production data, the 2024–2025 survey included a series of new questions regarding current market conditions, production costs, supply chain challenges, business adaptation strategies, and the outlook for North American botanical production. These questions were intended

to better understand the factors influencing current raw materials production and trade, and responses provide a baseline for identifying industry trends in future surveys.

Responses to these new questions indicate that many North American primary raw materials producers continue to operate in a dynamic business environment characterized by rising production costs, evolving buyer expectations, uncertainty surrounding international trade and tariffs, and continued investment in strategies intended to strengthen supply resilience. While responses varied among companies, several common themes emerged across the survey and are summarized below.

Market Demand and International Trade

Respondents were asked whether they had observed changes in buyer demand or contract volume during 2025 resulting from changes in international trade, including tariffs, and whether demand for domestically produced botanicals had increased, decreased, or remained unchanged. Respondents reporting changes were also asked to identify the factors they believed contributed to those changes and to identify any botanicals for which demand changed most notably.

Responses varied considerably. Several respondents reported increased demand for domestically produced botanicals, most commonly attributing this increase to buyer preference for locally sourced materials and tariff-related price shifts affecting imported botanicals. Others reported no noticeable change or indicated they were uncertain whether international trade had influenced demand. A smaller number of respondents reported decreased demand, citing inflation, tariff-related demand or price shifts, reciprocal tariffs, and reduced consumer spending.

Production Costs

Survey participants were asked to compare their 2025 production or harvest costs with previous years and identify the primary factors contributing to any changes.

A majority of respondents reported that production or harvest costs had increased, with most indicating either moderate or significant increases. Labor was the most frequently identified cost driver, followed by transportation, fuel, utilities, and other operating expenses. Several respondents also noted increasing costs associated with maintaining competitive wages, while others reported that scarcity of equipment or replacement parts, or labor had contributed to higher production costs.

Supply Chain Challenges

The survey also explored whether producers experienced challenges obtaining materials or equipment necessary for production due to trade disruptions or supply chain delays. Respondents experiencing challenges were invited to describe the nature and duration of those impacts.

Responses were mixed. Several respondents reported no significant supply chain disruptions, while others described delays in obtaining equipment, machinery replacement parts, shipping containers, and specialized production materials. One respondent noted that tariff-related costs delayed delivery of harvesting equipment, while another reported limited availability of specialized botanical ingredients. Overall, responses suggest that

supply chain challenges continued to affect some producers during the 2024–2025 survey period, although the impacts were not uniform across respondents.

Adaptation Strategies

Additional questions addressed how companies have responded to changing market conditions, including whether respondents had expanded or reduced cultivated acreage or wild harvest activity and whether they had implemented, or planned to implement, strategies to increase supply resilience.

Most respondents reported either expanding production or maintaining existing production levels, with few indicating reductions in cultivated acreage or wild harvest activity. To improve supply resilience, respondents most frequently reported investments in drying, processing, and storage infrastructure. Other commonly reported strategies included diversifying markets or buyers, adding new botanical crops, entering additional certification or sustainability programs, investing in value-added production, and partnering with other U.S. producers or cooperatives. Several respondents also described increasing inventories, emphasizing domestic production, and expanding collaboration with other producers as strategies to improve long-term supply stability.

Industry Outlook

The final survey question asked respondents to describe any significant challenges and opportunities they foresee for North American botanical raw material production over the next two to three years, including anticipated changes in buyer demand, production plans, and infrastructure or policy needs.

While individual responses varied, several recurring themes included concern regarding increasing production costs, declining numbers of domestic growers, wild harvesters, and experienced collectors, and continued consolidation within portions of the botanical supply chain. Several respondents also noted that increasing certification and regulatory requirements continue to add administrative and financial burdens. Others identified opportunities associated with increased consumer interest in herbal products, domestic sourcing, and the potential for expanded U.S. production where imported materials become less competitive. Respondents also emphasized the importance of maintaining knowledgeable harvesters, strengthening domestic production capacity, and investing in infrastructure to support future industry growth.

Conclusions and Future Surveys

The *2024–2025 Tonnage Survey of Select Botanicals Produced in North America*, prepared by the American Herbal Products Association, provides quantitative production data reported by the North American herb industry for 126 botanical commodities representing 113 different plant species. Respondents provided information on both wild-harvested and cultivated quantities for each surveyed commodity. In addition to harvest data, this edition includes information regarding current market conditions, supply chain dynamics, production challenges, and anticipated opportunities for North American botanical raw material production.

As with previous editions, AHPA has not attempted to evaluate the relationship between market demand for individual botanicals and their relative scarcity or abundance. However, survey results continue to suggest that market demand, production capacity, labor availability, and broader economic conditions remain important influences on reported production. The additional qualitative information included in this report provides further context for interpreting the quantitative survey results but represents the experiences of participating respondents rather than the industry as a whole.

AHPA intends to continue conducting these surveys to monitor trends in North American botanical production. Continued participation by primary raw material producers will help ensure that these surveys remain a valuable resource for understanding the North American botanical industry.



Solomon's seal
(*Polygonatum biflorum*)