WASHINGTON STATE UNIVERSITY

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Current Status of Certified Organic Agriculture in Washington State: 2016

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Center for Sustaining Agriculture & Natural Resources

Document Outline

Abbreviations used:

CSANR	WSU Center for Sustaining Agriculture & Natural Resources
CSA	Community Supported Agriculture operation
NOP	USDA National Organic Program
NASS	USDA National Agricultural Statistics Service
WSDA	Washington State Dept. of Agriculture

Introduction

The WSU Center for Sustaining Agriculture and Natural Resources (CSANR) has been providing statistical profiles on the Washington State organic sector since 2000. Annual updates on all crops reported have been done since 2004. The information presented in this document provides the 2016 update for the state, along with some national and global data.

The goal of this document is to make detailed timely information on the dynamic organic sector readily available to growers, businesses, policymakers, and others interested in organic agriculture. Detail is generally provided at the level reported to the certifier. The WSDA Organic Program certified 94% of the NOP-certified farms in the state in 2016, and is the primary data source, and Oregon Tilth Certified Organic (OTCO) and California Certified Organic Farmers (CCOF) also regularly provide data. Other certifiers are contacted for their information, but it is not always complete. Farmgate sales data typically lag the acreage data by one year since growers report their previous year sales during the renewal process from which the data are derived.

Global Trends

Statistics on organic agriculture are continually improving. The annual "World of Organic Agriculture" publication provides a good overview of trends globally, by region, and for certain countries and crops. Data are collected annually from various sources around the world (e.g., EU, individual country statistics, organic certifiers). Data quality and detail are not consistent and not all major producing countries, including the U.S., provide complete data each year. Some countries segregate certified vs transition land, others do not. Some of the upward trends in organic area simply represent more complete reporting.

The report includes an organic market overview by A. Sahota. His data are based on his company's market research. One challenge with the sales data is the euro to dollar exchange rate. Some data are in dollars, others in euros, and when the rate changes, it can create some false impressions on actual sales trends. The most recent data are for 2015, and show global sales of organic food of US$81.6 billion, with the U.S. and Germany as the leading countries for sales (slide 5). Per capita expenditure on organic food is still small, showing the potential for growth.

Consumer Demand for Organic Food

Global market, 2015 - US$81.6 billion

Leading countries:

USA	35.8 billion €
Germany	8.6 billion €
France	5.5 billion €
China	4.7 billion €

Per capita consumption of organic:

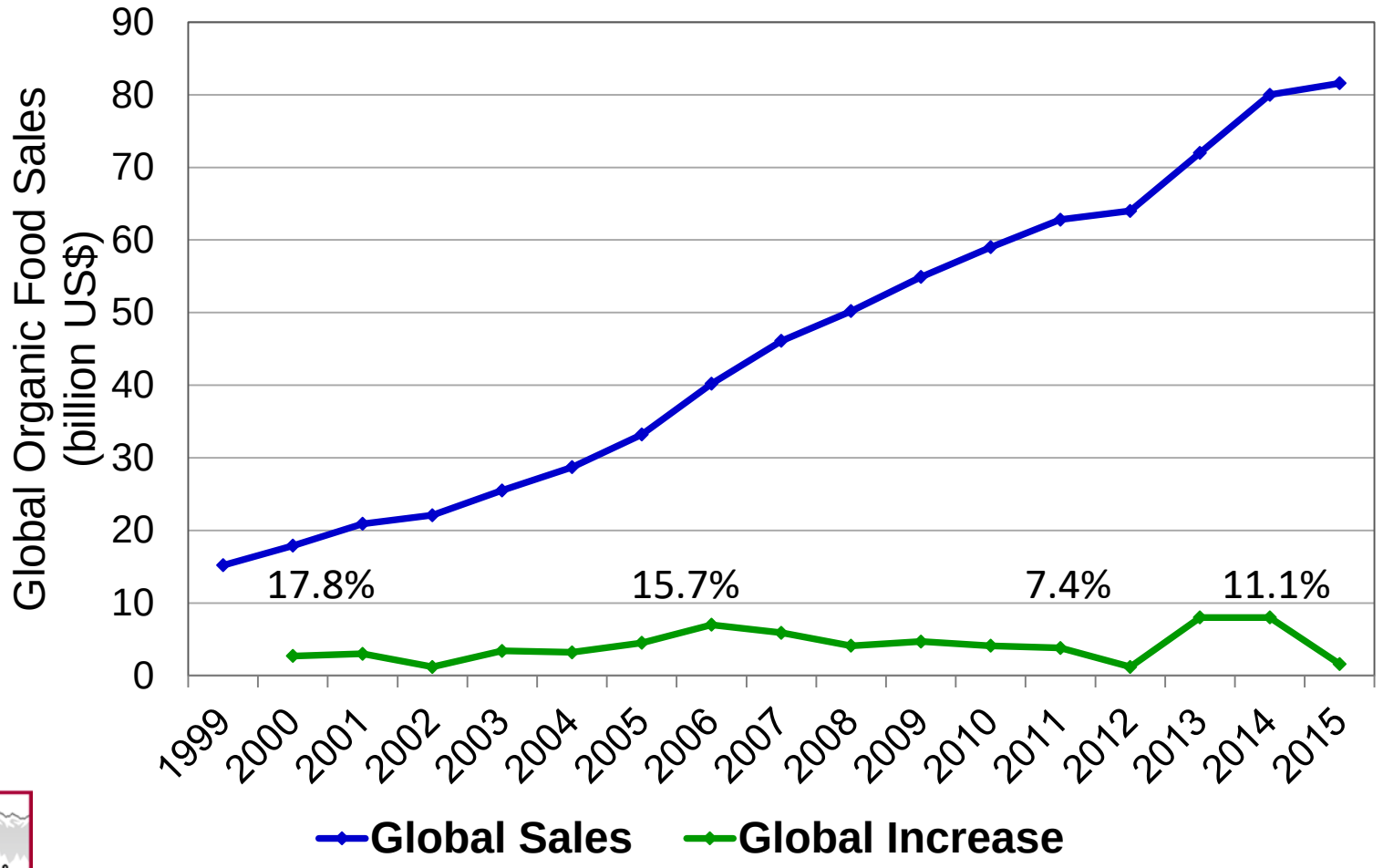
Switzerland	262 €/yr (~6% of food $)
Denmark	190 €/yr
Sweden	177 €/yr
U.S.	111 €/yr

Source: Willer and Lernoud, 2017

The steady increase in global organic sales (slide 7) has been driven by annual growth rates of 10-20% over the last 15 years. Even during the 2008 recession period, global growth was over 7%. Sales increased by about US$1.6 billion in 2015 over the previous year.

North America and Europe have accounted for over 90% of organic sales worldwide for the past decade (slide 8). Seeing continued growth in the “Other” category will indicate that markets are diversifying. Asian markets in particular are poised to grow, with increasing middle class incomes and concern about the quality and safety of food. Also, more stringent pesticide regulations in many countries may lead to “organic” type production systems being necessary to meet the residue requirements.

Consumer Demand for Organic Food



Growth Rate

Center for Sustaining Agriculture & Natural Resources

Source: World of Organic Agriculture

Consumer Demand for Organic Food

Market Share of Sales by Region (%)

	North Amer.	Europe	Other
2003	46	52	2
2005	45	51	4
2007	43	54	3
2009	48	48	4
2011	50	46	4
2012	50	45	5
2013	49	43	8
2014	48	44	8
2015	51	39	8 (Asia)

Note: % has changed in part due to US$ vs euro currency fluctuations.

Source: World of Organic Agriculture

In 2015, there were an estimated 125.7 million acres of agricultural land (cropland, permanent grassland, other) under organic management worldwide, up 16% from 2014, and equaling about 1% of global agricultural land. Of the organic land, 20% was in arable crops (e.g., grains, vegetables), 8% in permanent crops (e.g., tree fruit, coffee, grapes, olives), and 65% in permanent grassland. North America had 7.3 million ac of organic agricultural land, of which 46% was arable land. From 2005 to 2015, global organic arable land grew from 10.8 million ac to 24.6 million ac (+127%), and permanent crop land grew from 3.5 million ac to 9.9 million ac (+186%). For many crops, a significant area of the organic land reported was in transition, thus more product will be reaching markets in the near future.

Examples of the share of global area that various organic crops represent:

Cereals	0.5%	Coffee	8.9%
Oilseeds	0.6%	Grapes	4.7%
Vegetables	0.6%	Temperate fruit	2.3%

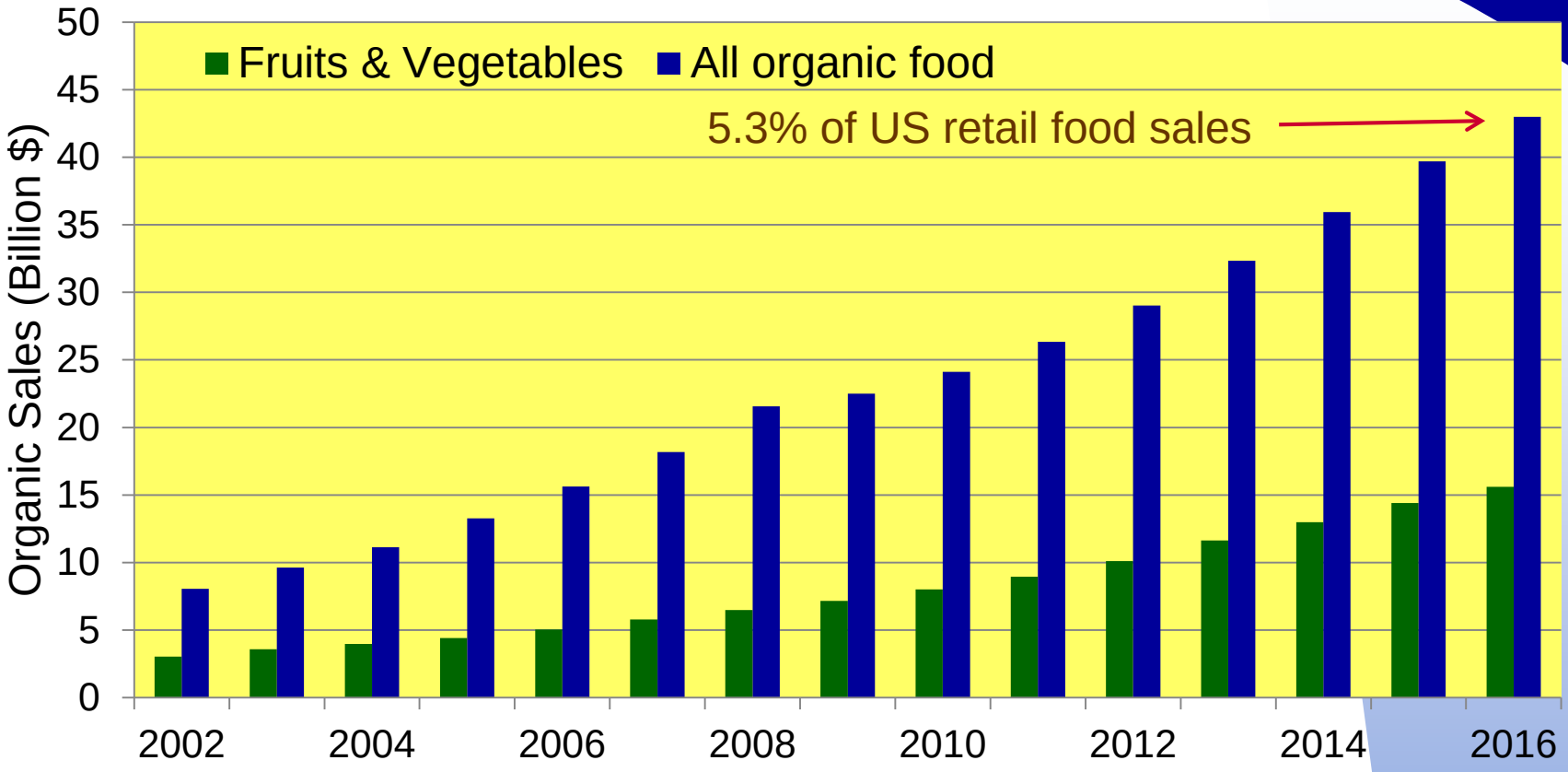
Source: Willer and Lernoud, 2017
http://www.organic-world.net/yearbook/yearbook-2016/slide-presentations.html?L=mgqaydvx

National Trends

The Organic Trade Association (OTA) in Vermont, USA, commissions an annual organic industry survey. Some highlights are available on line https://www.ota.com/. It contains details on sales value of overall organic products, organic foods, and various subcategories (e.g., produce, dairy, bread), with trend data over time. Their data represent retail sales value (slide 11), and capture most market channels including farmers markets, CSAs, internet, and exports.

The USDA is increasing its data collection on the organic sector. The Agricultural Marketing Service (AMS), which also houses the National Organic Program, collects data on different crops, livestock and livestock products, market channels, product volume, and price (slide 12). The Economic Research Service (ERS) has done some studies. Also the National Agricultural Statistics Service (NASS) did the first ever Organic Production Survey in 2008 and repeated it in 2014 and 2015. They polled certifiers for crop specific acreage data in 2014 and 2015, but collected limited crop detail. The National Organic Program (NOP) Organic Integrity Database eventually will provide more data on the nature of the organic sector.

Consumer Demand
Growth of US Organic Food Sales



Retail organic food sales increased 8.4% in 2016. Organic fruits and vegetable sales increased 8.4% and were 36% of all organic food sales; >10% of all fruits and vegetables sales ($) in U.S. in 2016 were organic.

Source: OTA, Nutrition Business Journal

Organic Data Sources

USDA-AMS Market News – a list of organic reports
https://www.ams.usda.gov/market-news/organic
These include: Organic Dairy; Livestock, Poultry and Grain; National Organic Grain and Feedstuffs; Organic Poultry and Eggs; Weekly Feed and Seed Summary; Specialty Crops (a searchable database, includes fruits and vegetables); Cotton; Retail Markets (local and organic).

USDA-NASS organic surveys.
https://www.agcensus.usda.gov/Publications/Organic_Survey/

USDA-ERS http://www.ers.usda.gov/topics/natural-resources-environment/organic-agriculture.aspx Organic market overview, organic production area, organic trade, individual research reports.

USDA-FAS has international trade data for many organic products in its Global Agricultural Trade System.

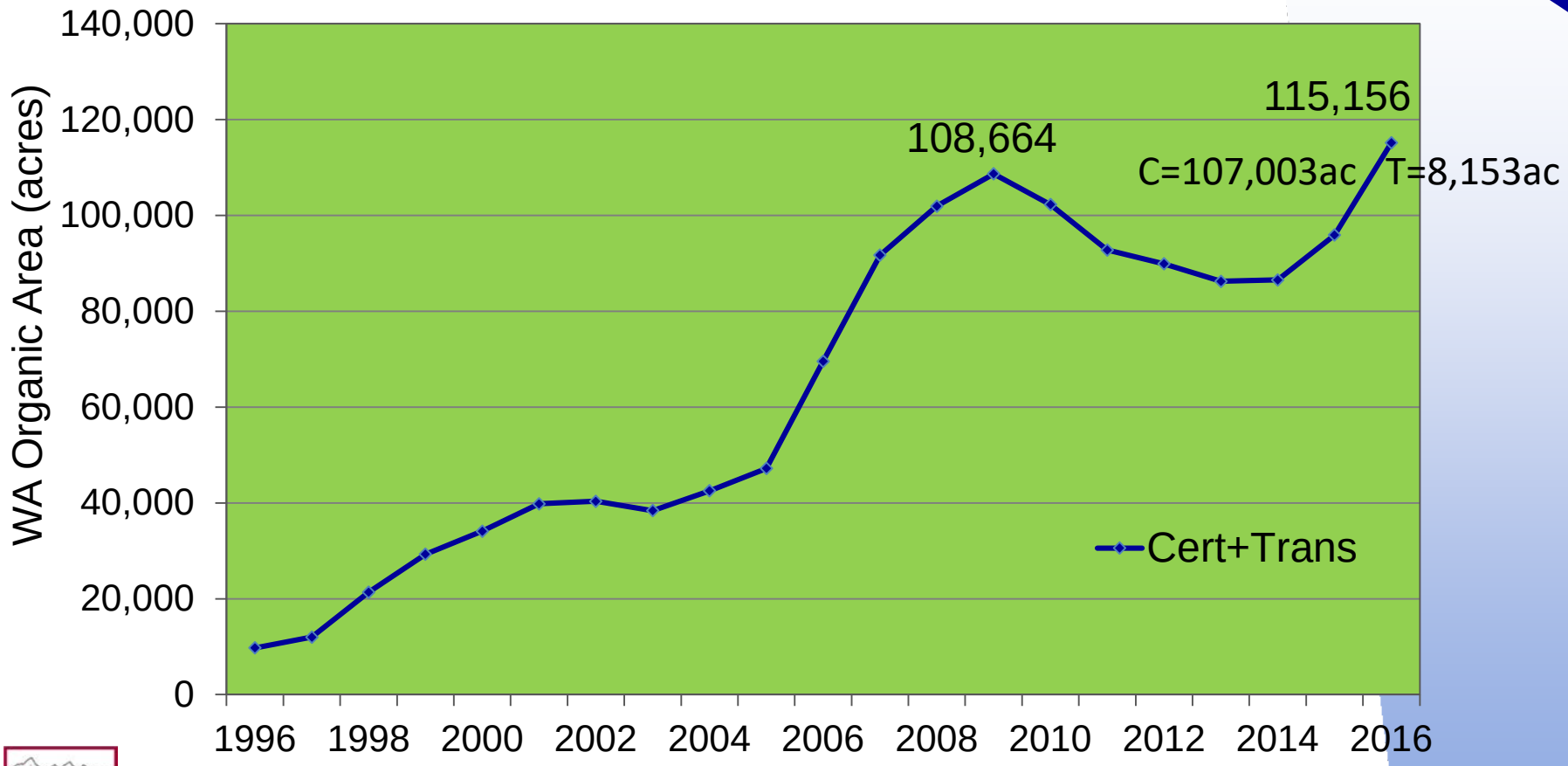
USDA NOP Organic Integrity Database. https://apps.ams.usda.gov/integrity/
Current information on certified farms and companies by state and products. No acreage data at present.

Washington State Trends

Area of land under organic management (either certified, or registered with a certifier as transition) peaked in 2009 after rapid growth during the preceding four years (slide 14). Area declined for several years and reached a new high in 2016, with area up about 17% from 2015 (slide 15). "Area" data are reported as actual site acreage certified, versus "acres" data that include doubled-cropped land (slides 15 and 16). An increase in "undefined land" in 2016 resulted from changes to the WSDA organic database where land uses such as fallow, cover crops, etc. are no longer entered as *crop* acres. Registered transition site area rose 70% over the previous year in 2016 to reach 8,153 acres.

Forages, Vegetables, and Tree Fruit have been the leading crop categories in terms of acres for many years, and remained so in 2016 (slide 16). Changes in the acreage of these different categories over time are displayed in slide 17.

Washington Organic Farm Area



C+T=Certified + Transition; includes all site area but no double crop 2005-2015. WSDA only 1995-2003; additional data added from other certifiers beginning in 2004.

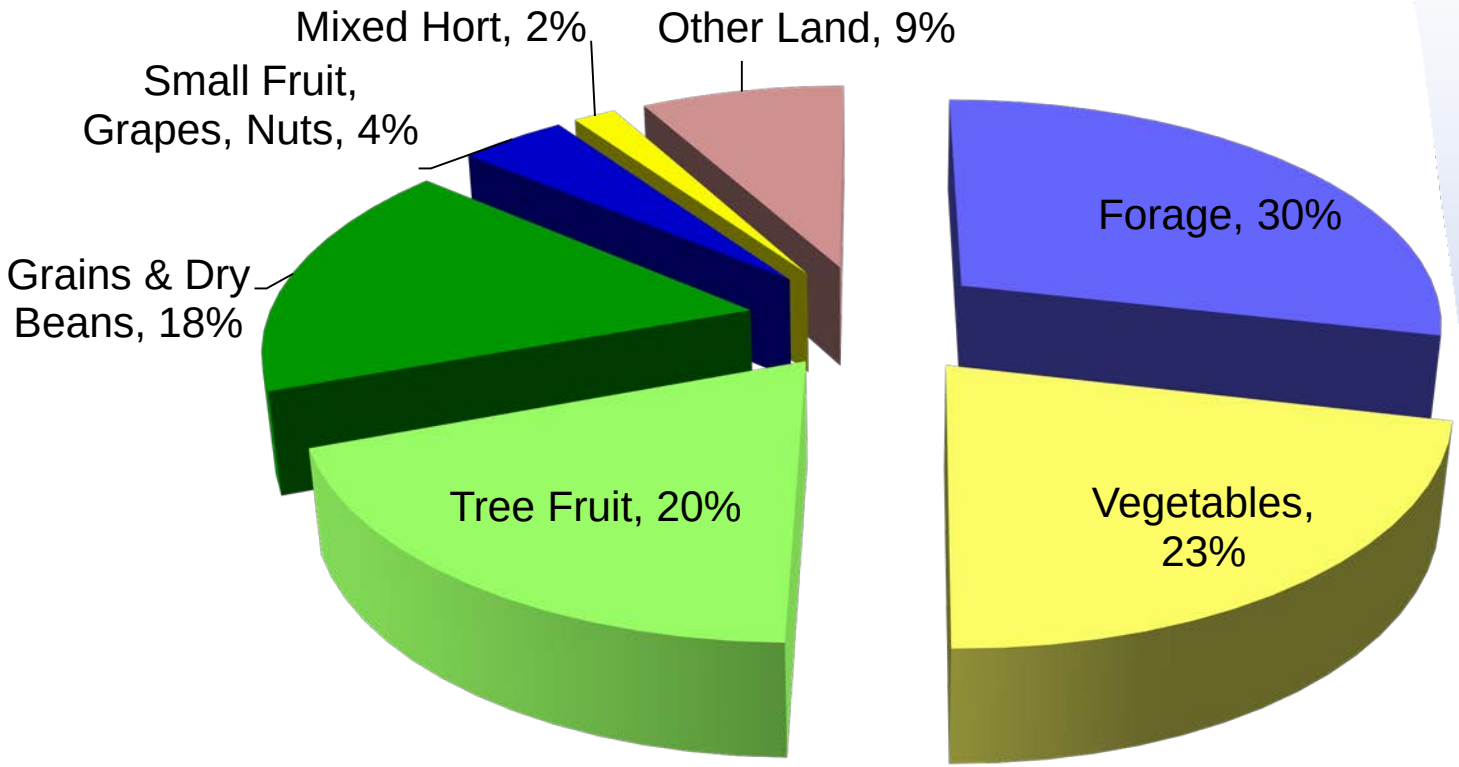
Certified Organic Crop Acres

Washington State

	Acres			% Chg 2015-16	% of total
	C 2015	C 2016	T 2016		
Forage	29,661	32,615	937	10	31
Vegetable	21,474	24,639	783	15	23
Tree Fruit	19,685	21,771	4,991	11	21
Grains/Dry Beans/Oilseeds	12,760	19,114	652	50	18
Small Fruit, Grapes, Nuts	4,165	4,762	461	14	4
Herbs	1,203	1,342	--	12	1
Mixed Horticulture	2,333	559	--	--	--
Fallow	3,509	66	--	--	--
Other land	845	782	--	--	--
Total crop + dbl crop + other	**95,635**	**105,660**	**7,824**	**10**	**--**
Undefined land	143	8,291	677	++++	--
Total acres + dbl crop	**95,778**	**113,951**	**8,501**	--	--

C=certified; T=transition; % Chg is change in certified acres from 2015 to 2016; % of total is for 2016 certified acres. 2016 combined certifier data includes 6,948 ac double crop; ***certified site area = 107,003 ac****; 2015 data includes 4,690 ac double crop;* ***certified site area = 91,088 ac****. 2016 increase of undefined land due to change in WSDA database tracking methods*

Crop Distribution of Certified Organic Acres in Washington – 2016



Certified crop acres*: **105,660**

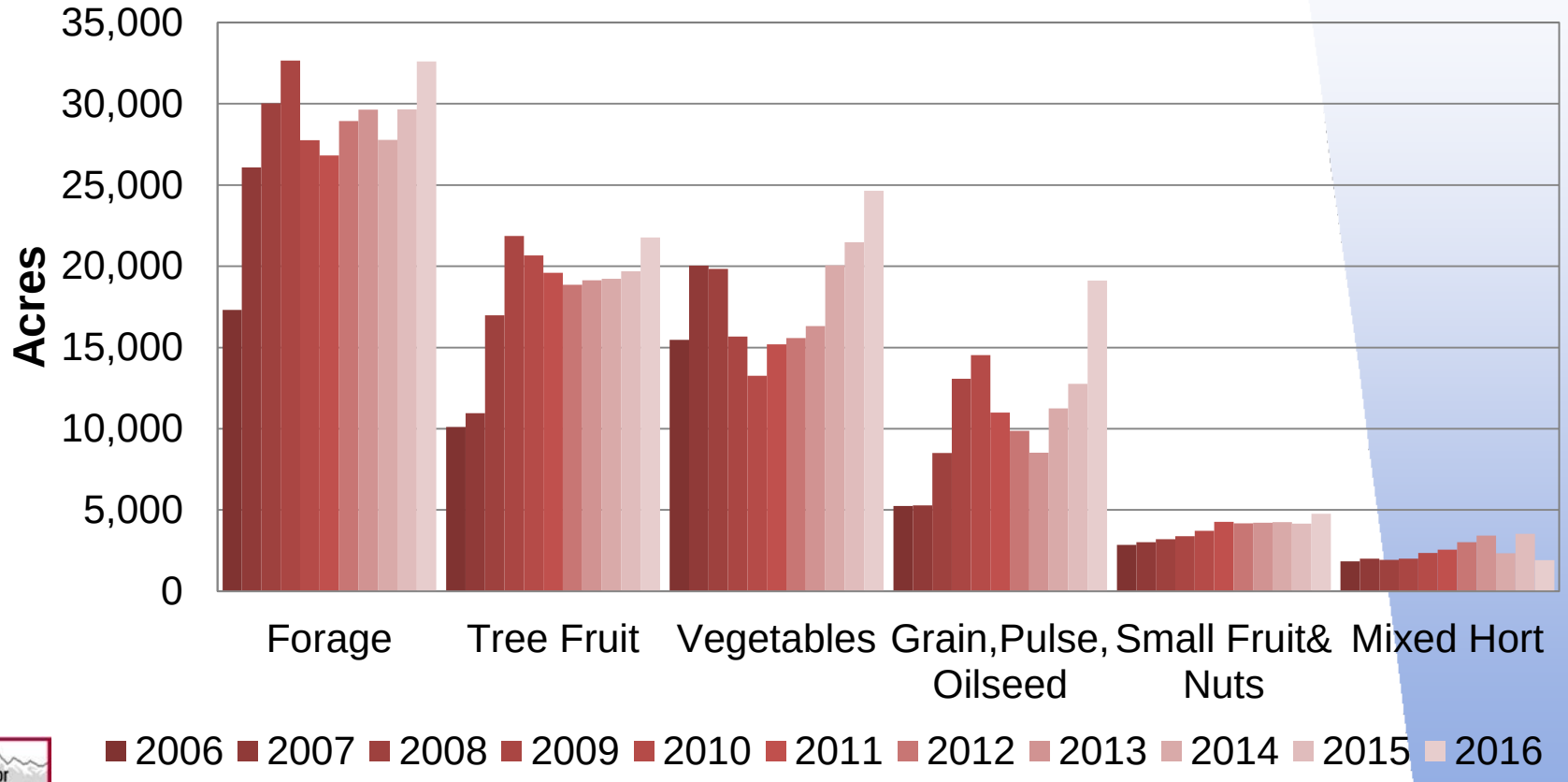
*includes double crop but not 8,291 ac undefined land

Transition crop acres: **7,824** not including 677 ac undefined land

*Total certified site area = **107,003 ac** (e.g. includes undefined land not tracked as crop)*

Combined certifier data

Crop Distribution of Certified Organic Acres in Washington

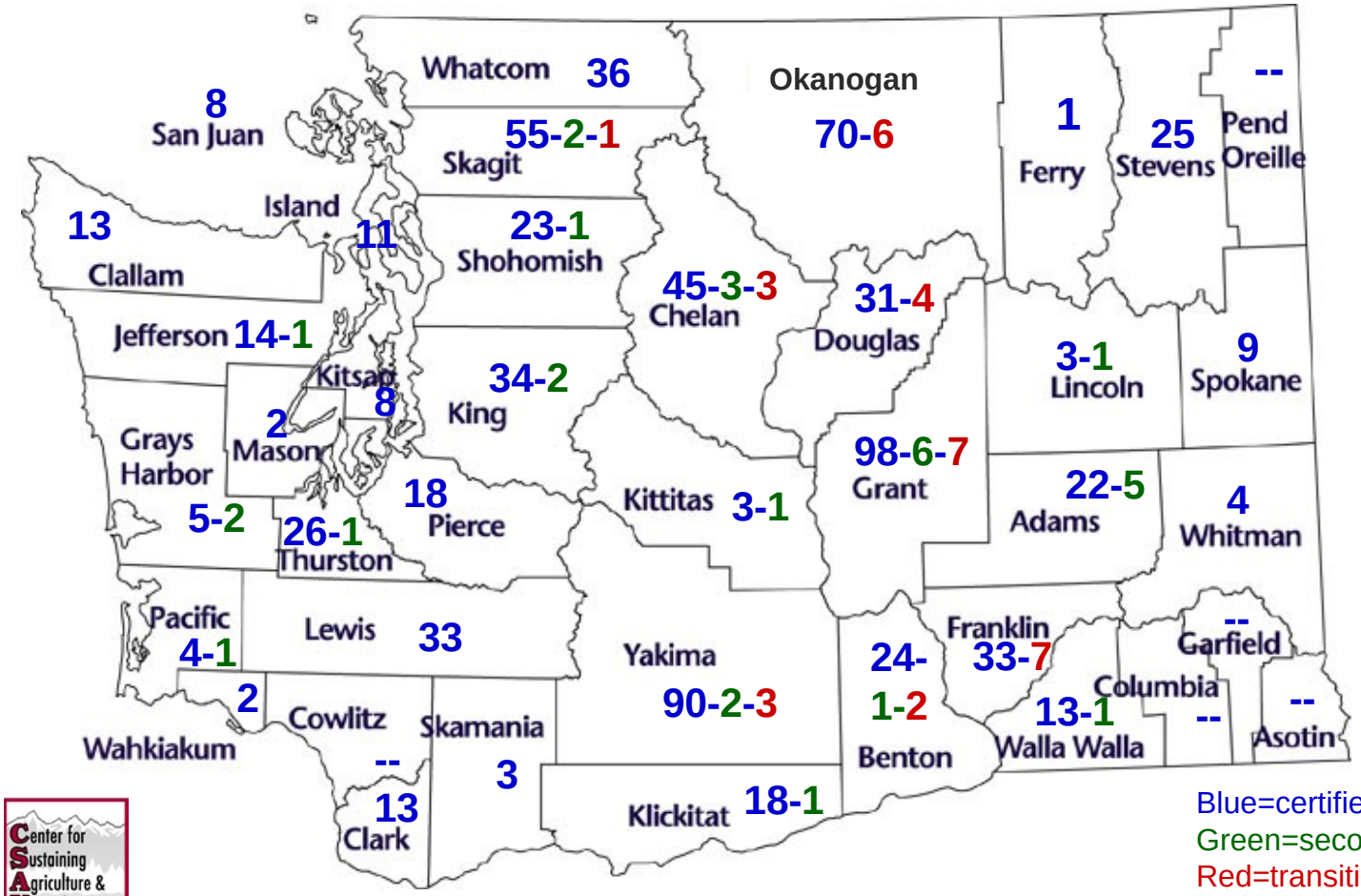


Combined certifier data; double crop acres included.

The spatial distribution of organic farms in Washington by county is shown by farm number (slide 19) and area (slide 20). Five counties showed no certified farms in 2016. Grant County had the highest number of certified farms and acres. Statewide, 797 farms were certified organic in 2016, with another 34 farms registered as transition only. Eastern WA counties had 61% of the certified farms by number and 69% of the certified acreage. Organic farms with <$5,000 in annual direct sales are exempt from certification and may or may not choose to be certified; thus some of these farms do not show in the data here, but were estimated to represent less than 2% of all the certified organic land in the state in a 2008 analysis.

The trends in organic farm number and area for eastern and western Washington are shown in slides 21 and 22. Farm numbers and area reached new highs in 2016. Farms are not required to register with a certifier during the transition period, and generally more land and farms become certified each year than the transition data predict. There is also considerable turnover in farms. For example, the net change in WSDA-certified farms from 2011 to 2012 was +1; however, 52 farms entered while 51 exited certification in that period. The majority of land registered for transition was on existing certified farms in eastern WA (slide 23)

Number of Certified Farms by County, Washington 2016



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Blue=certified producers (primary county)
Green=secondary co. producers
Red=transition only producers

Combined certifier data; county farm numbers are estimated; a few growers report farm sites as one certification number/county whereas land may be in multiple (secondary) counties.

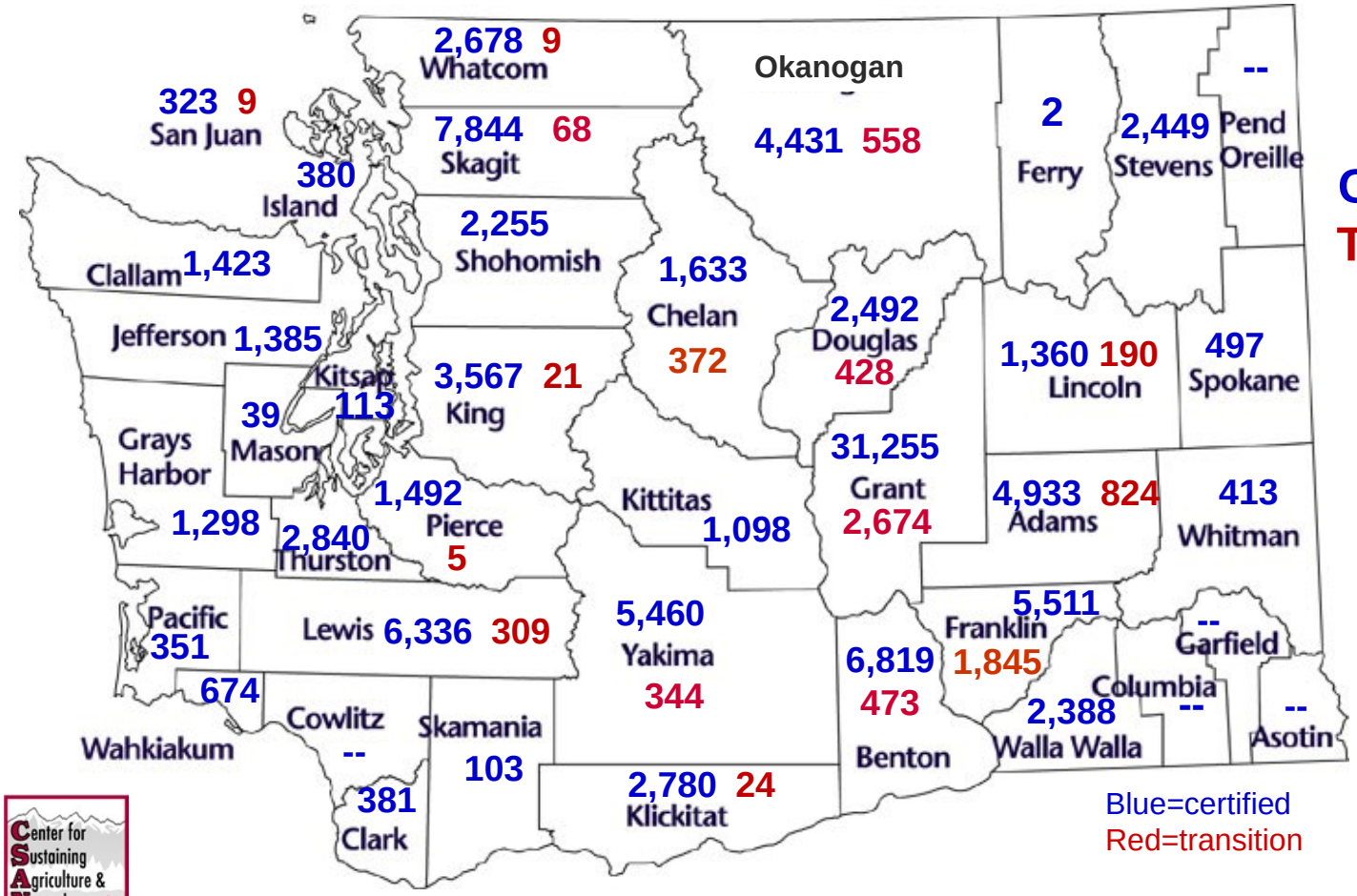
 # Farms

797certified
34 transition only

Eastern WA
61% of farms

Western WA
39% of farms

Certified Farm Area (acres) by County, Washington 2016



Area*

Cert 107,003 ac

Trans 8,153 ac

Eastern WA

69%

of certified ac

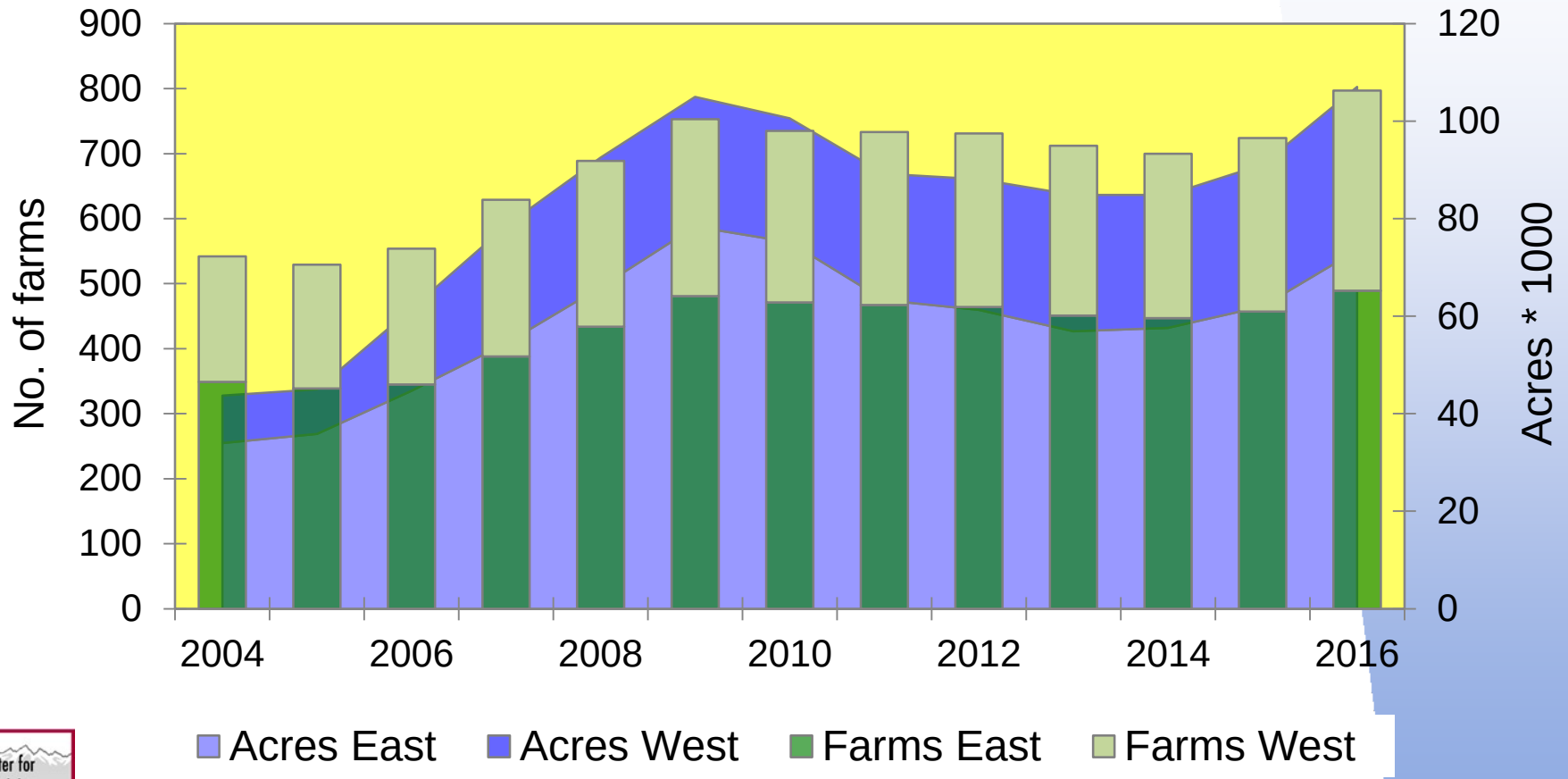
Western WA

31%

of certified ac

*Combined certifier data. *Area is the total of farms' certified or transition site acreage. Farms may have additional transition acreage that is not reported.*

Regional Certified Farms and Area
Washington State



Combined certifier data. Area does not include double crop acres. Farm number includes both livestock and crop producers.

Organic Farm Site Area (ac)
Washington State


Photos: Organic Trade Assoc.

	2009	2011	2012	2013	2014	2015	2016
Site area	---------- Acres ----------						
Certified	104,962	89,186	88,072	84,868	84,848	91,088	107,003
Transition	3,703	1,592	1,817	1,386	1,676	4,800	8,153
No. of producers[a]	753-10	729-2	731-3	712-4	700-7	724-22	797-34

[a] *Includes crop and livestock producers. Values in black represent farms with certified organic land (may also have transition acres); red values indicate farms that have only transition acres .*

WA Transition Land 2016

	East	West	Total
# farms with Transition acres	88	10	98
# farms T only	33	1	34
% that are T only	37.5	10.0	35.7
% T farms E WA	89.8	--	--
% T only farms E WA	97.1	--	--
All T acres	7,732	421	8,153
% by region	94.8	5.2	--
T ac on new farms	1,412	20	1,432
% by region	98.6	1.4	--
T ac on new as % all T ac	18.3	4.8	17.6

Majority of Transition (T) is happening on previously Certified farms who are expanding. 88% of farms with T land, and >94% of T acres are in E WA. Transition acres increased to 8,153 in 2016.

Combined certifier data.

The following group of slides shows more detail on several of the major crop categories. In 2015, organic tree fruit (slide 25) accounted for 22% of area, but over 60% of farmgate sales, given its high value per acre. A survey done in January 2017 of grower intentions to expand indicated the potential for certified apple area to near 25,000 acres by 2018. This would continue the step-wise pattern of growth seen in organic apple area (slide 26). A separate more detailed report on organic tree fruit is available (slide 27).

Organic vegetable area (slide 28) is concentrated in the irrigated central Washington region, with much of the production going to processing markets (especially frozen uses). Area peaked in 2007, dropped until 2010, and now has surpassed the previous high. Sweet corn and green peas, which are often double-cropped, have the largest area. These two organic crops are estimated to account for 10% and 13%, respectively, of all acres of those crops grown in the state.

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Organic Tree Fruit Acres
Washington State

	--- Certified acres ---							Trans acres
	2010	2011	2012	2013	2014	2015	2016	2016
Apple	14,790	14,296	13,657	14,030	14,052	14,283	16,191	4,244
Pear	2,033	1,917	1,900	1,820	1,843	2,050	2,243	374
Cherry	2,147	1,827	1,792	1,850	1,939	2,056	2,078	373
Apricot*	299	296	266	285	299	260	251	--
Nectarine	550	528	488	464	440	395	379	--
Peach	701	619	618	594	580	553	553	0.25
Plum/Prune*	125	92	89	64	58	56	76	--
Mixed stone	13	17	45	22	17	32	--	--
Total*	20,658	19,592	18,855	19,129	19,228	19,685	21,771	4,991

**apricot includes aprium; plum includes pluot and plumcot; totals do not include mixed tree fruit*

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Tree fruit had a 21% share of all organic acreage in Washington State in 2016.

Combined certifier data


Photo: F. Peryea

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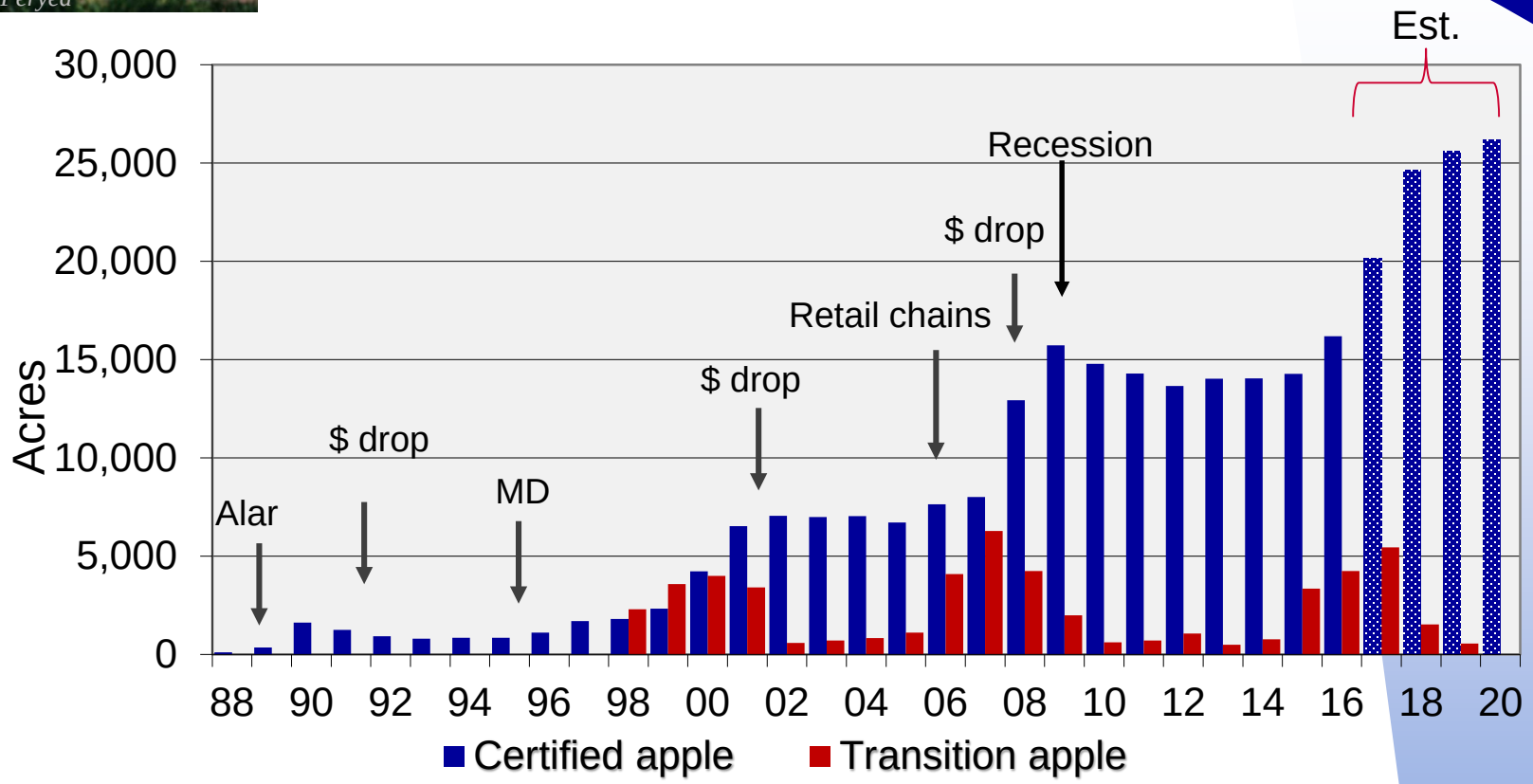
Organic Apple Acreage
Washington State



Organic (C+T) = 11.3% of WA apple bearing acreage (based on 2016 WSDA estimate of 180,961 acres)

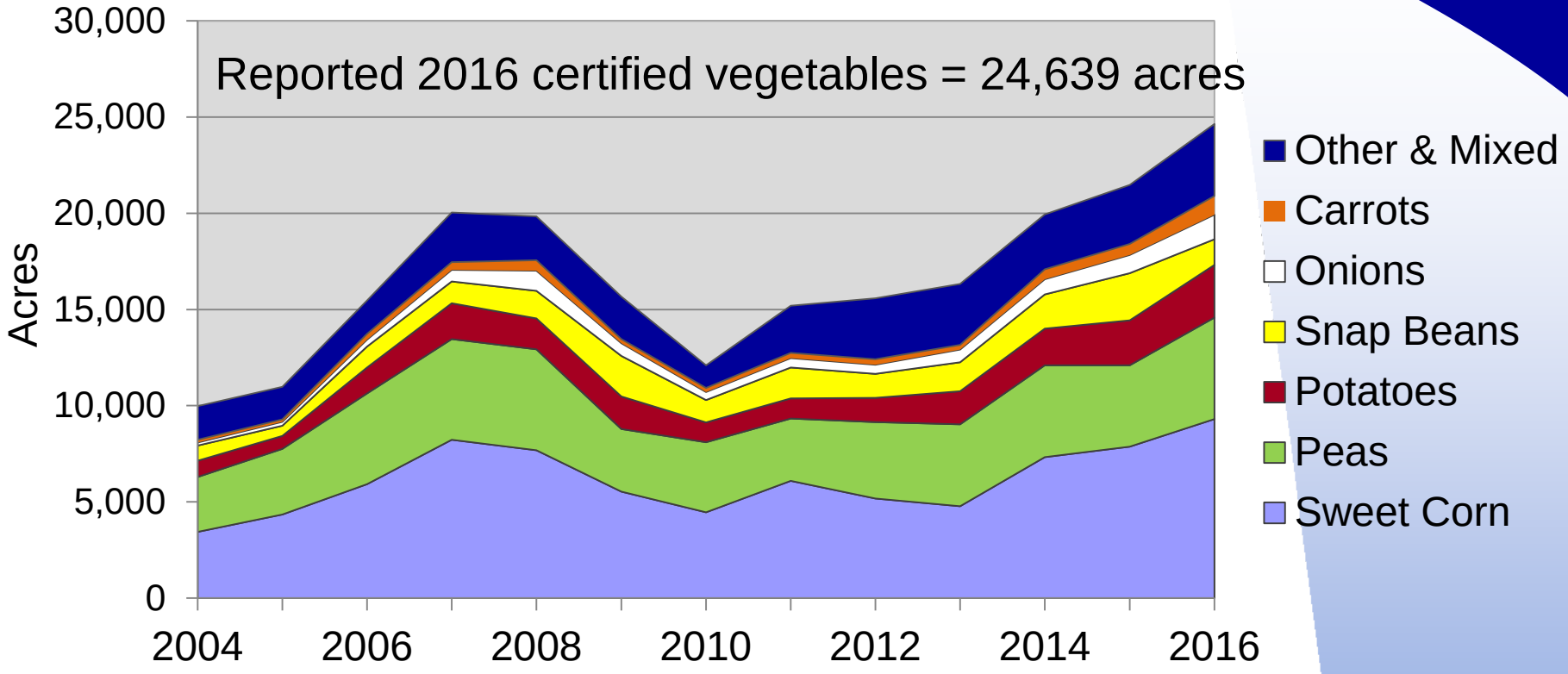
Some historical events that have influenced organic apple production include the Alar incident, price volatility ($ drop), the introduction of mating disruption (MD) for codling moth control, and market entry by national chain supermarkets (Retail chains).

Center for Sustaining Agriculture & Natural Resources

Combined certifier data

More information on Washington organic tree fruit statistics is available on-line at:
http://tfrec.cahnrs.wsu.edu/organicag/organic-statistics/

Organic Vegetable Acres
Washington State



Estimated organic acreage share: Sweet corn 10%; Peas 13%

Organic acreage share is the % of all state acres of the crop that are certified organic

Combined certifier data

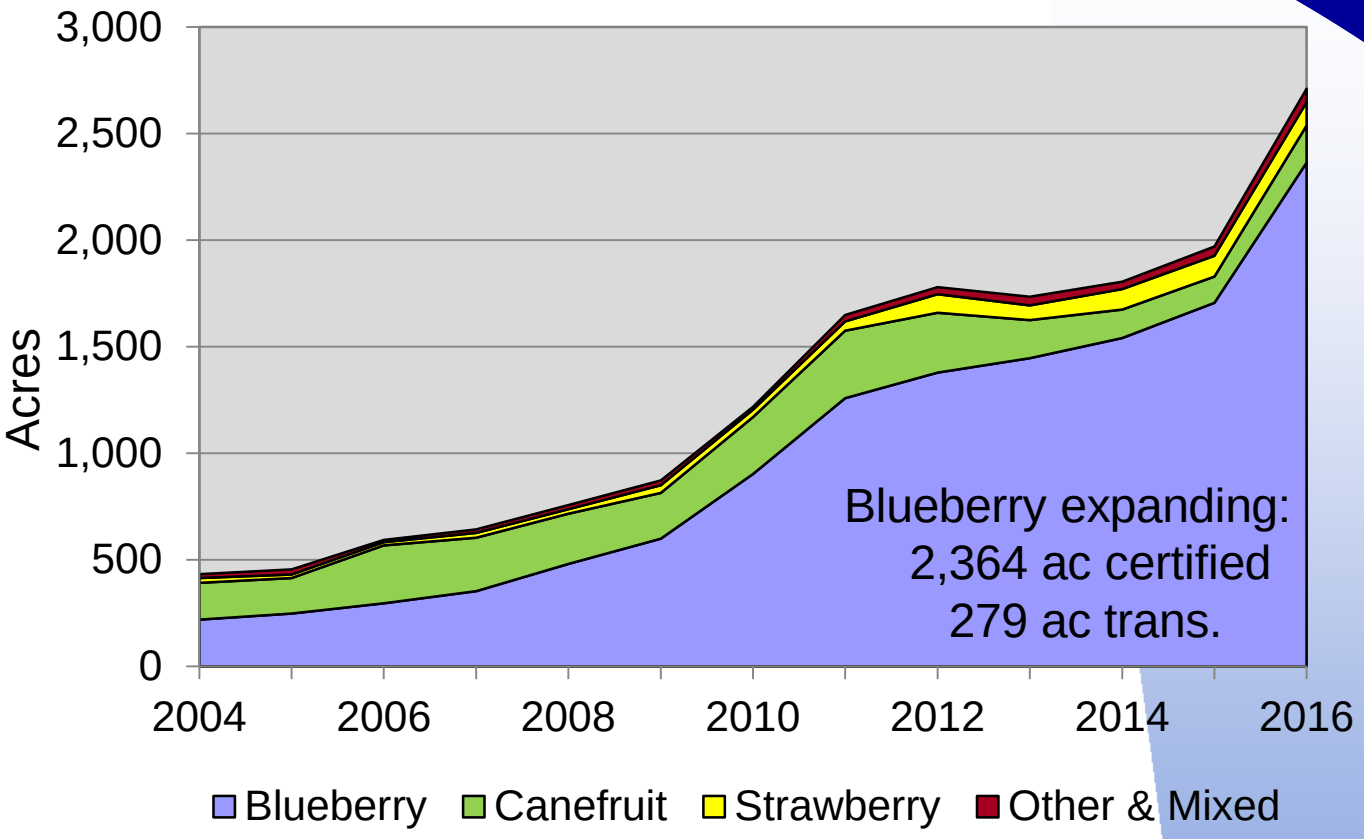
Blueberries account for the largest share of organic berries in the state (slide 30). Blueberries in general have experienced tremendous growth in recent years, and much of the growth has occurred in irrigated central Washington as opposed to the traditional western Washington growing area. Central Washington appears to be a more amenable climate for growing organic blueberries. Global demand for blueberries, especially for organic, continues to grow. More information on organic blueberries can be found in Trends and Economics of Washington State Organic Blueberry Production and 2015 Cost Estimates for Establishing and Producing Highbush Organic Blueberries in Eastern Washington.

Grapes for juice (e.g., 'Concord', 'Niagara') have historically dominated organic grape production in the state (slide 31), but have slowly declined, while organic wines grapes expanded and have leveled off. There is very little organic table grape production in the state. Certified organic vineyards cannot label the finished wine as "organic" if sulfites, a standard wine stabilizer, are added in the wine-making process, but instead must say "wine made with organic grapes."

Organic Berry Acres
Washington State


Photo: Blue Dog Farm

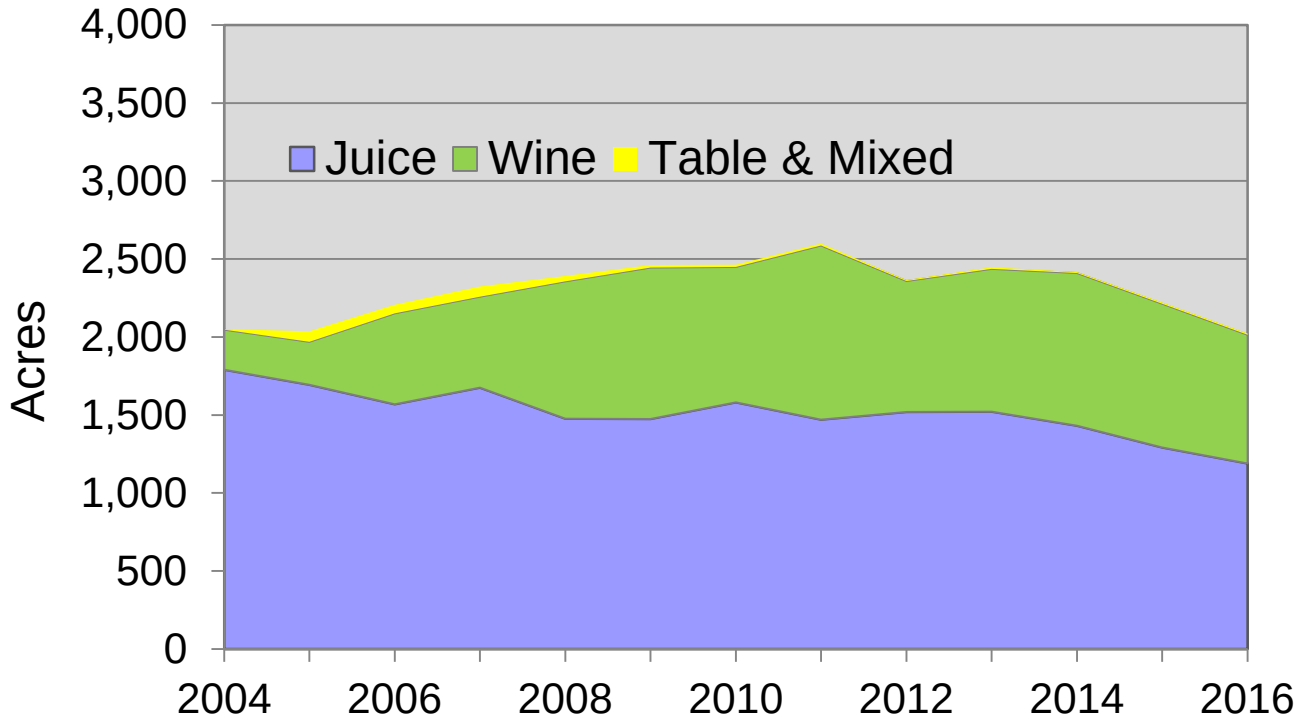

Photo: Boistfort **Valley Farm**



Organic estimate18% of total WA blueberry acreage
(using 13,000 ac state total from WA Blueberry Commission 2015).

Combined certifier data

Organic Grape Acres
Washington State



Reported 2016 total certified grapes = 2,022 acres
(Concord = 55%)
Estimated organic share of WA acreage = 5% of juice and 2% of wine grapes


M. McCoy

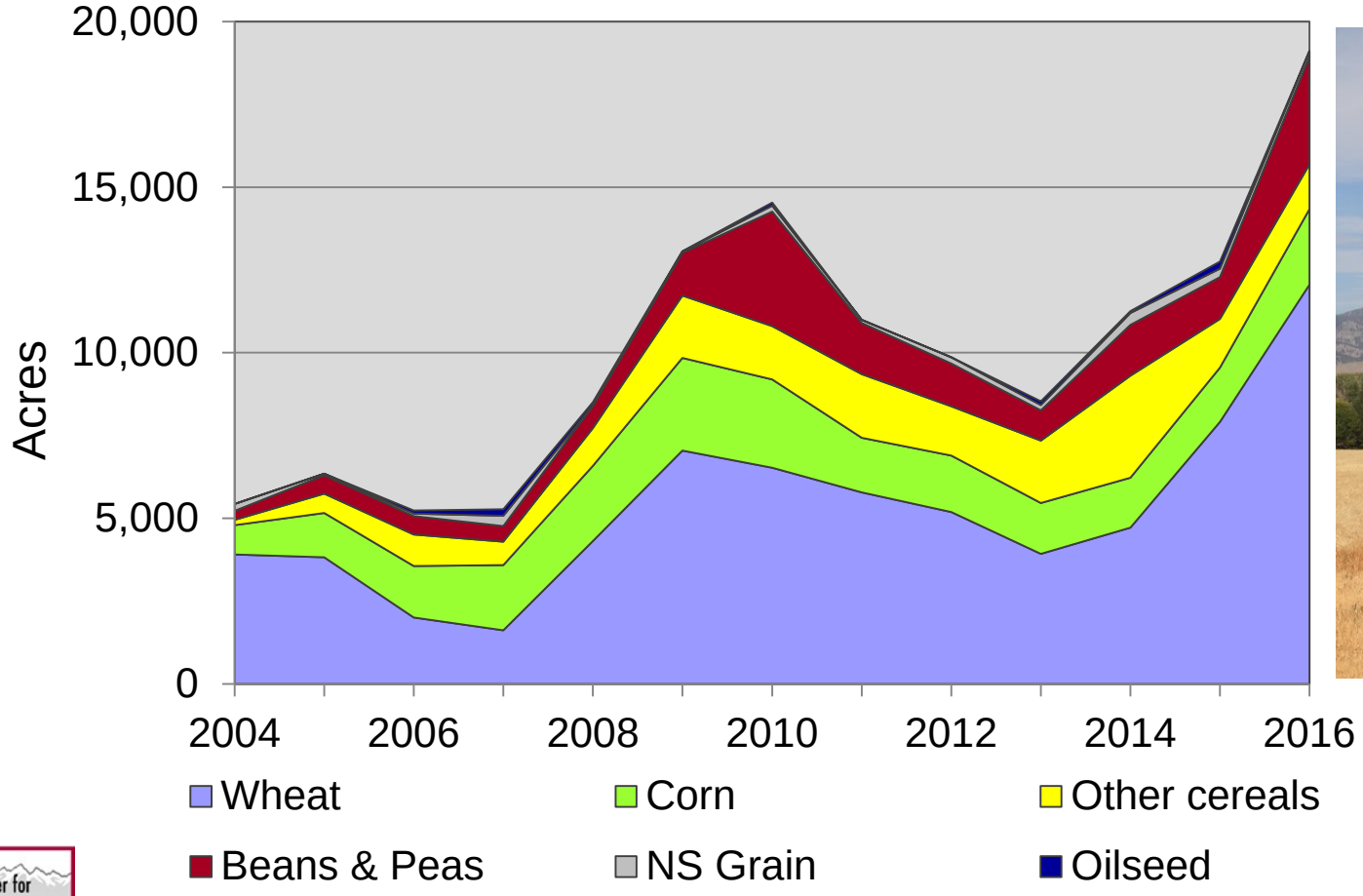

Lopez Island Vineyards

Combined certifier data

Washington is a major grain producer with extensive wheat production in the dryland regions of eastern Washington. However, it lags behind other states such as Montana and North Dakota for organic wheat production. While demand and prices for organic grains are currently high, dryland organic cereal production remains a challenge in eastern Washington due to poor weed control, high cost for nutrients, and limited crop rotation options. A recent publication on case studies of organic grain growers in the PNW is now available. Much of the organic grain production, including wheat, is on irrigated or western Washington farms, where diverse rotations include high value crops and address the weed and fertility issues. Specialty grains, such as emmer and spelt, are also in demand by organic consumers. While oilseed production has expanded in the state, especially for canola, little is under organic management (slide 33).

Organic forage area has been relatively stable for the past ten years (slide 34). Organic dairy cow numbers peaked in 2008 and then declined by 37% in the next two years (slide 37). However, forage area did not contract nearly as much. The dairy herd is again expanding, and forage acreage should increase in the future.

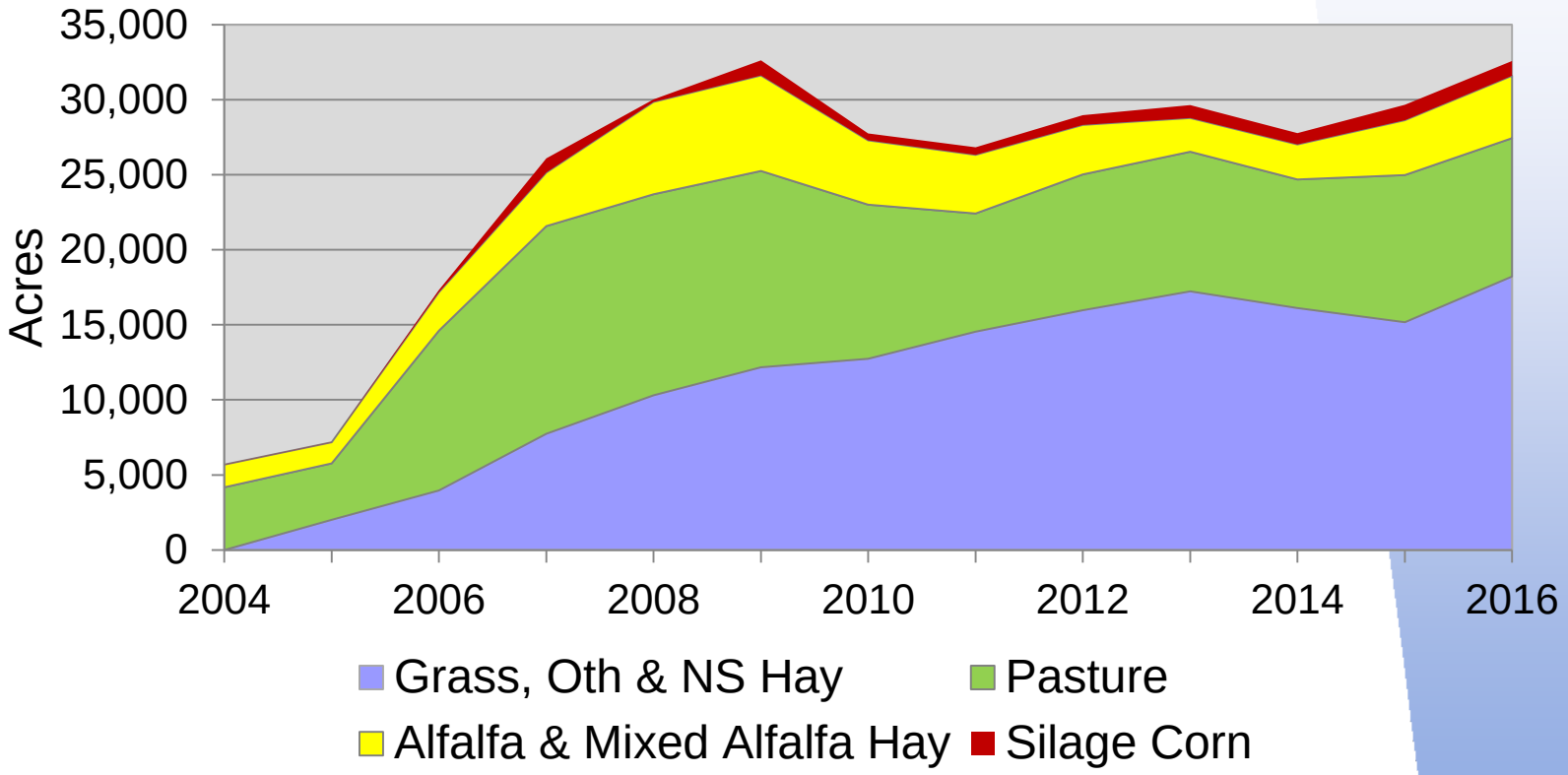
Organic Grain, Pulse & Oilseed
Washington State Acres



Reported 2016 organic grain, pulse and oilseed = 19,114 acres

Combined certifier data

Organic Forage Trend
Washington State



Reported 2016 WA organic forage total = 32,615 ac; much of the hay area is also used for silage, haylage, or pasture

Combined certifier data

Organic dairies in the state expanded rapidly during the mid-2000s as demand for organic dairy products was rising (slides 36 and 37). The number of certified dairies doubled from 2006 to 2008 and then declined 25% during the recession. Despite regulatory changes and shortages of organic feed, organic cow numbers have increased since 2010, and represented 3.3% of the state dairy herd in 2016. There were 45 certified dairies in 2016, with none pending. Total number of dairy cows surpassed 15,000. Statewide organic milk production rose an estimated 70% from 2011 to 2016, both from increased number of cows and from higher per cow production (slide 38). Demand for organic milk is steadily increasing nationwide.

Estimated Organic Dairy Cows

Washington State

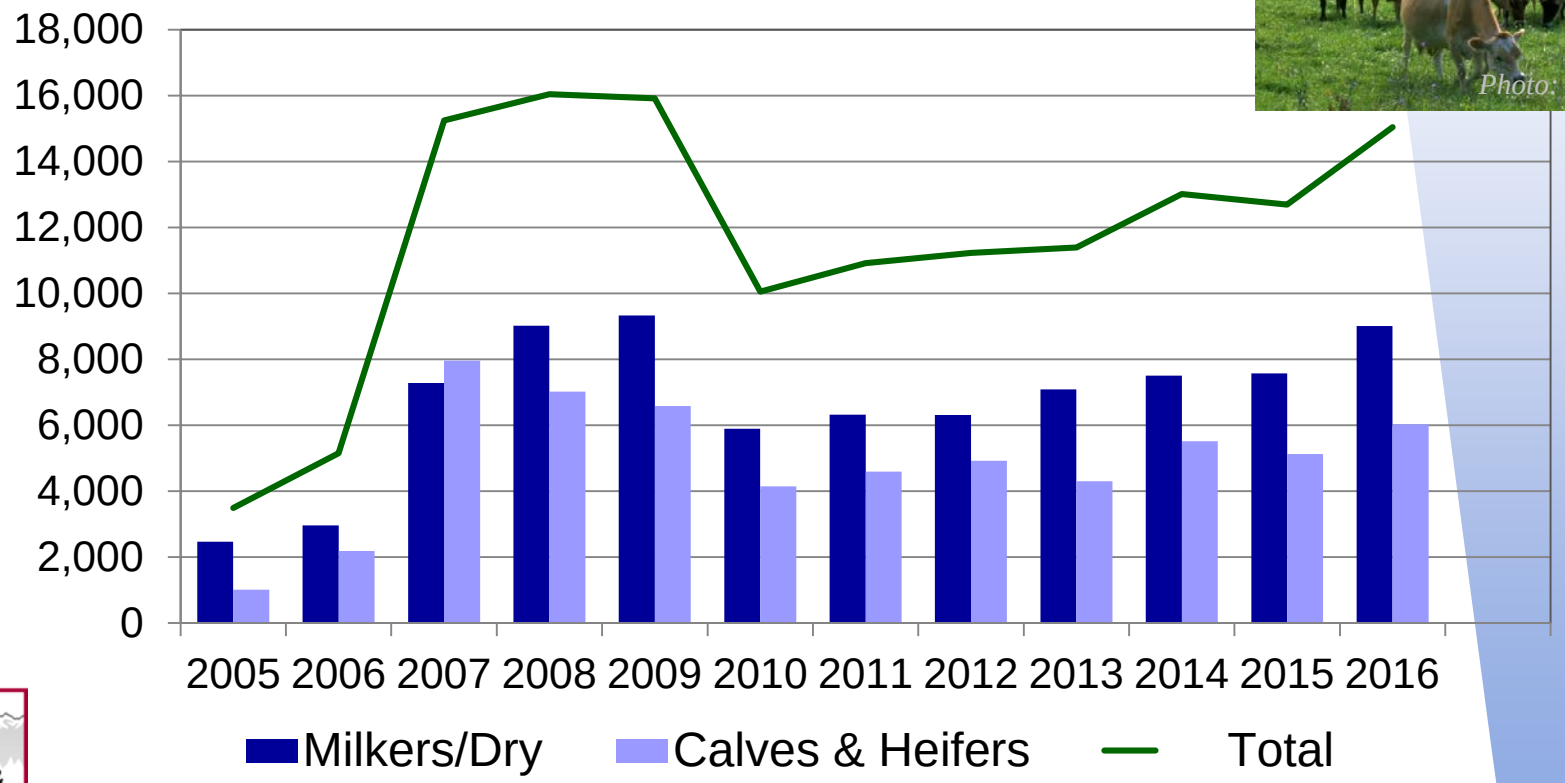
	- - - - - - - - - Certified - - - - - - - - -						
	2006*	**2008**	**2010**	**2012**	**2014**	**2015**	**2016**
Milkers & dry	2,970	9,022	5,898	6,311	7,505	8,290	9,012
Calves & Replacement heifers	2,180	7,022	4,154	4,922	5,514	5,308	6,033
Total	5,150	16,044	10,052	11,233	13,091	13,598	15,045
No. organic dairies	23	46	34	34	38	39	45

2016: 1 Goat Dairy

Organic dairy cows represented 3.7% (2008) and 3.3% (2016) of state milk herd**

*Combined certifier data, primarily WSDA and OTCO. *An additional 5,112 milkers had "pending" status in 2006. ** Based on NASS (WA) annual statistics.*

Organic Dairy Cows
Washington State



Combined certifier data, primarily WSDA and OTCO.

Organic Dairy Sector

Washington State

Trends - 2011 to 2016

No. of certified cow dairies	+36%
No. of milkers/dry cows	+43%
No. of calves & replacements	+38%

	2011	2015	2016
No. of dairies pending	1	6	0
No. of milk cows in transition	150	>506	0
Ave. lb milk per cow per month*	1,187	1,638	1,590
Est. statewide monthly production (million lb milk)	6.91	10.93	11.77

*WSDA cows only

Combined certifier data, primarily WSDA and OTCO.

Other
Organic Livestock

Livestock data have always been more difficult to collect than crop data. The NASS surveys in 2008 and 2015 did gather livestock data, and these are compared for WA in slide 40. The value of livestock and livestock product sales were 18% and 25% of total organic sales in the state in 2008 and 2015, respectively. This is lower than the U.S. average of 41%. Washington was #10 in organic milk production , and #1 in organic eggs (slide 41). Organic egg production in the state jumped nearly 5-fold from 2008 to 2014, and another 70% in 2015. There are large organic broiler producers in the state but no data were available.

Organic livestock numbers in the U.S. rose 36% from 2014 to 2015 (cattle, +43%; chickens, +35%). Total livestock numbers only rose 4% in WA in 2015 on the 87 operations that reported.

WA Organic Livestock

	2015	2008	2015	2008
	WA		US	
Livestock sales	6%	1%	12%	10%
Livestock product sales	19%	17%	31%	29%
2015 WA	# inventory	# sold	Sales $	
Milk cows	6,744	1,464	??	
Beef cows	377	80	$0.11 mil	
Other cattle, calves	5,167	3,202	$3.0 mil	
Layers	1.62 mil	33.6 mil doz	$86.9 mil	
Broilers	11 farms	??	??	

4.6 mil in 2008

Sources: USDA NASS OPS 2008, 2015

WA Organic Livestock

2015	
Livestock and poultry sales	$40.7 mil
Livestock and poultry product sales	$121.5 mil
#6 in U.S.; 6% of U.S. sales	
Organic milk production	93.64 mil lb
Organic milk sales	$31.0 mil
#10 in U.S.	
Organic egg sales	$86.9 mil
#1 in U.S.; 12% of U.S. sales	

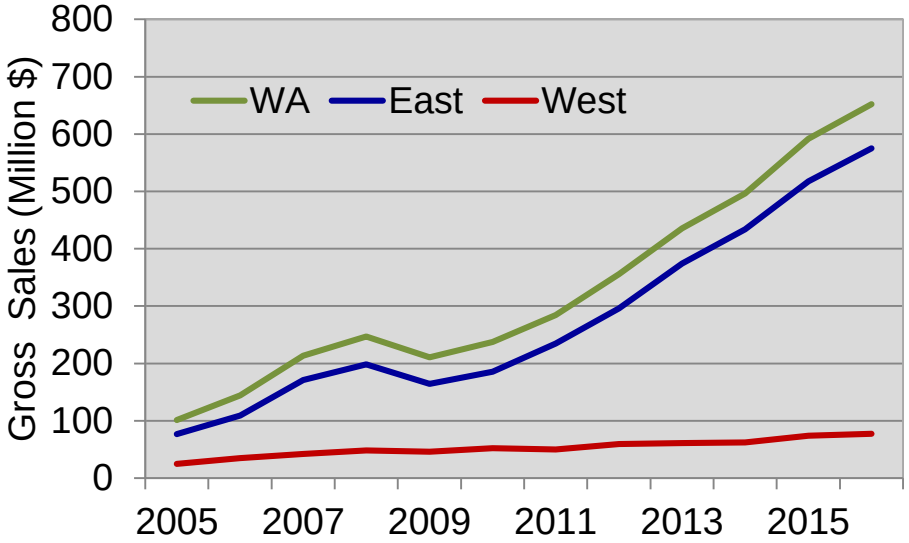
Source: NASS 2015 OPS data

Organic farms report gross farmgate sales for the previous year when they renew certification each winter. This is part of the audit process for certification, but also allows for estimates of the organic sector size and growth in terms of economic value. Eastern Washington (essentially the central Washington irrigated counties) accounts for 87% of farmgate sales coming from 68% of certified acres (slide 43). Total sales grew substantially from 2014 to 2015, rising 19% or $95 million. Leading organic sales were Grant County ($167 million) in eastern Washington and Skagit County ($21 million) in western Washington (slides 44 and 45). Not included in these totals are sales for several large egg and broiler companies (>$50 million), the value of wine grapes that are only reported as finished wine, and several dairies who report through their cooperative.

The distribution of organic sales (WSDA-certified only) by farm economic class shows that 42% of farms have annual sales less than $100,000, and in aggregate, these farms account for only 1.2% of all organic sales in the state (slide 46). Farms with more than $1 million in sales increased their aggregate share of statewide organic sales by 50% from 2010 to 2013 (slide 47). From 2013 to 2015, farms starting in the $250K-1MM category appear to have expanded or garnered higher prices, as this category contracted while the >$1MM category expanded by 2015.

Trend of Farmgate Sales Value

Cert. Organic Crop and Animal Products Washington State Producers



	--------2016--------			
	Million $	% of $	% of acres	% +/- 2015-16
East	575.3	88	69	11
West	77.0	12	31	6
Total	652.3	100	100	10

Photos courtesy of Red Dog Farm, Finnriver Farm, and Sunny Pine Farm

WSDA and OTCO data only. Farmgate sales do not include values from farms that were new applicants, that did not renew certification during reporting year, or that reported as processor or handler sales.

2016 Farmgate Sales

Certified organic crop & animal products

Eastern WA county estimates

	$ Million
Grant	194.5
Benton	65.9
Walla Walla	53.8
Yakima	51.7
Adams	50.9
Okanogan	50.4
Franklin	45.8
Chelan	27.5
Douglas	21.5

	$ Million
Klickitat	11.4
Stevens	1.1
Spokane	0.27
Whitman	0.1
Kittitas	0.1

Asotin & Lincoln 2016 sales not disclosed to protect confidentiality.

$ 575.3 MIL total East

88% of state sales

$652.3 MIL total WA

Adams up 57%, Benton up 22%, Grant up 17% *

*WSDA & OTCO data only. *Compared to 2015*

2016 Farmgate Sales

Certified organic crop & animal products

Western WA county estimates

	$ Million
Skagit*	22.6
Whatcom*	5.4
Lewis	10.8
Thurston*	9.7
King	9.4
Snohomish*	5.9
Pierce*	2.9
Jefferson	2.3
Grays Harbor	1.9

	$ Million
Clallam	1.4
Clark	1.3
Kitsap	0.7
Island	0.3
San Juan	0.04

Cowlitz, Mason, Pacific, Skamania & Wahkiakum not disclosed, to protect confidentiality.

$77 MIL total West (12% of sales)

$652.3 MIL total WA

Snohomish up 94%, Whatcom down 49%

Compared to 2015

Photo courtesy of Sequim Lavender Festival

WSDA & OTCO data. County sales are estimates (sales reported for county may include sales from sites in other counties).

**Significant egg, broiler, and mushroom production sales value not available for these counties, totaling >$30 mil.*

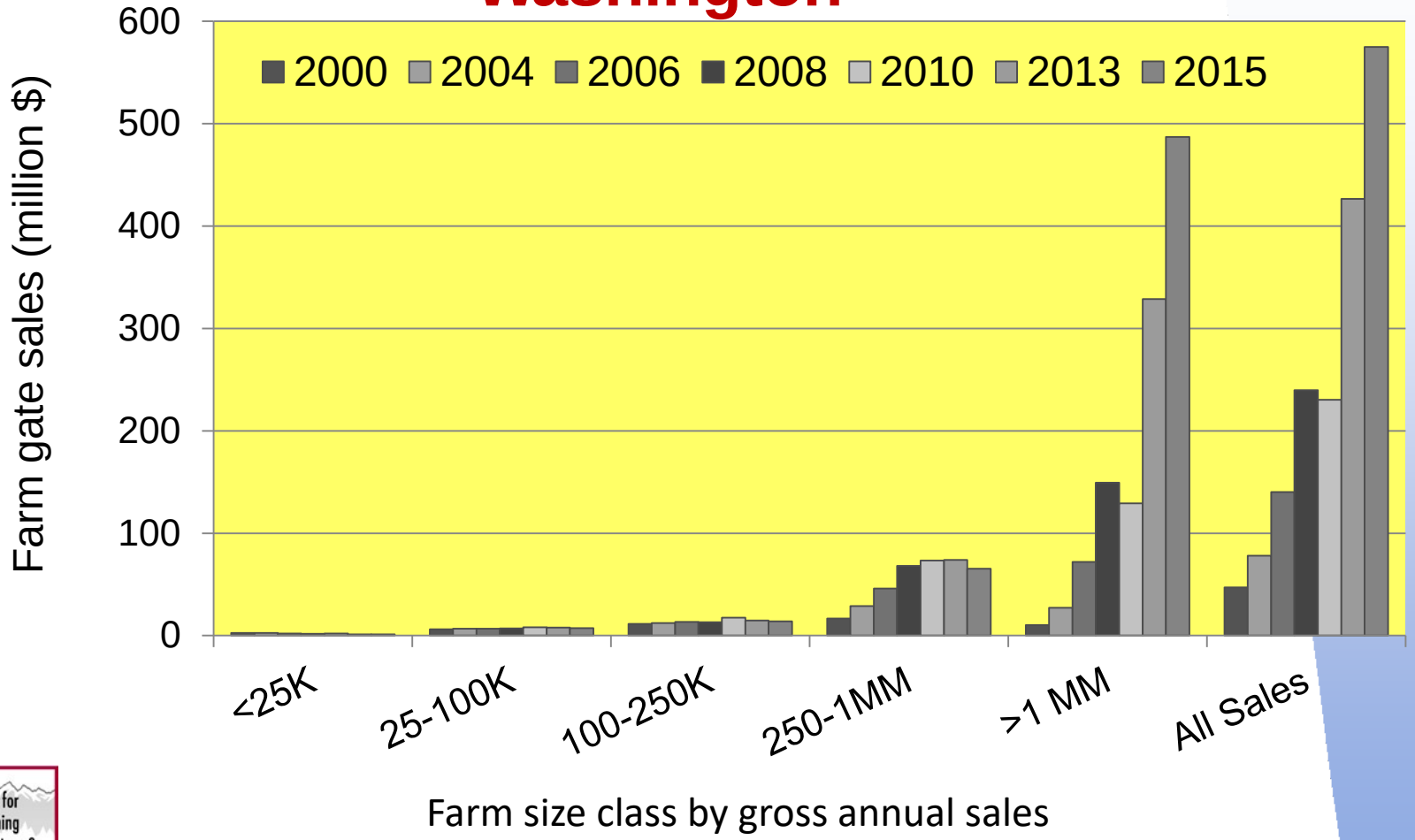
Organic Farm Economic Class (by Sales) Washington*

Annual Gross Sales Class	% of Farms			% of Sales		
	2006	2010	2015	2006	2010	2015
<25K $	38	31	21	1	1	0.2
25-100K $	24	22	21	5	3	1
100-250K $	15	17	14	10	8	2
250K-1MM $	17	21	21	33	32	11
>1MM $	6	9	24	51	56	85

Photo: WSU Small Farms Program

***WSDA certified farms only.** Gross farmgate sales in dollars. 671 farms reported sales in 2015. Sales do not include values from new applicants and farms that did not reapply during reporting year.*

Distribution of Organic Farmgate Sales by Sales Class Washington*



***WSDA farms only.** Gross farmgate sales in dollars. 671 farms reported sales in 2015. Sales do not include values from new applicants or farms that did not reapply during reporting year.*

Comparison with NASS

The 2015 NASS Organic Production Survey was released in September 2016. Response rate for the U.S. and Washington was 60% and 50% respectively. The U.S. data appear to underestimate acreage in 2015. Farmgate sales were up considerably from 2008. Using the 2015 OPS data, Washington appears to have one of the highest farmgate revenues per acre ($8,694), emphasizing the key role that high-value specialty crops play in the state organic sector (slide 49). Washington's national rank in production of a range of organic products is estimated from the 2015 data as well (slides 50, 51). The state is a leading producer for several fruits and vegetables, hops, herbs, and eggs.

The share of Washington agriculture represented by organic is estimated in slide 52, using the combined certifier data and the most recent data for all of WA from NASS. The share of farms and cropland have been steady while the share of sales has been increasing.

U.S. Snapshot

- USDA-NASS organic surveys in 2014 and 2015; comparable data
- 99% of all acres were certified
- 2015 sales: crops $3.5 bil; livestock $743 mil; livestock products $1.2 bil

	2014	2015	% change
No. of org farms (C)	13,174	14,861	+13
% all US farms	0.64	0.72	
Cert. acres	4,081,903	5,336,058	+31
% all US acres	0.45	0.59	
All organic sales (mil $)	5,456	6,163	+13
% all US sales	1.30	1.47	

Revenue per acre: US $1,413 CA $3,082 WA $8,694

Sources: USDA NASS OPS 2014, 2015; Certifier Surveys 2014, 2015

WA in the National Picture

2015 NASS Data	Rank	% of U.S. organic
No. certified farms	6	5
No. certified acres	17	2
Value of commercial sales	2	10
Apples, fresh	1	93*
Pears, all	1	81
Cherries, sweet	1	91
Peach, all	2	16
Blueberry, all	2	33
Grapes, all	2	5

*by volume of production

Source: USDA NASS OPS, 2015

WA in the National Picture

2015 NASS Data	Rank	% of U.S. organic*
Carrots	2	3
Onions, yellow	1	54
Peas, green	2	26
Potato	1	27
Squash, all	3	12
Sweet corn	1	51
Other vegetables	2	33

*by volume of production

Other top states:

CA #1 everything

PA #3 total sales

WI #2 number farms

AZ #2 vegetable sales

Source: USDA NASS OPS, 2015

Estimated Certified Organic Share of Washington Agriculture

No. farms (2015 data)	2%
Cropland (2015 organic data, 2014 state data)	1%
Farmgate sales (2014 data)	4.9%

If organic ag was considered a single commodity, it would rank no. 7 among all Washington commodities for dollar value.

Comparisons are based on the combined certifier organic data and the statewide data from NASS.

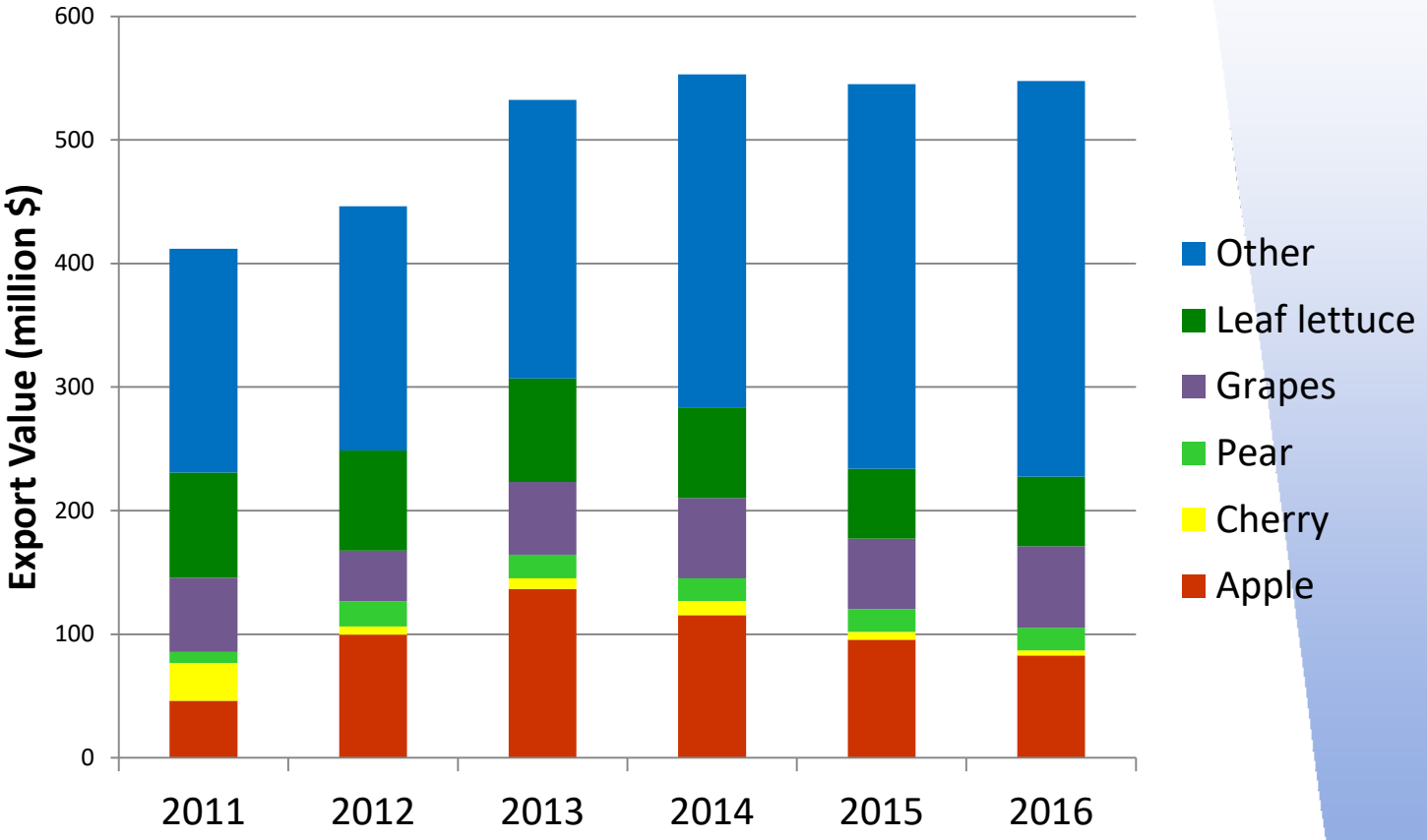

Alvarez Farm produce: C. Donovan

Organic Trade

Many organic products are actively exported and imported among countries. Certain products, such as coffee and bananas that are tropical, account for significant shares of organic imports in the main North American and European markets. Estimates of U.S. organic exports and imports have been made by the USDA Foreign Agricultural Service. Apples have consistently been one of the leading organic exports by value (slide 54); most of the trade is with Canada. U.S. imports of organic corn and soybean have risen dramatically in recent years in response to U.S. organic animal production expanding more quickly than the grain acreage needed to support it (slide 55). The estimated $83 million of organic apple exports in 2016 is diminished by the $64 million in organic apple imports (generally counter-seasonal production) in terms of positive contribution to the balance of trade. The rising trade deficit for organic products is evident in slide 56.

U.S. Organic Exports

Apples ($83 mil) were the leading U.S. organic export in 2016, followed by grapes ($66 mil) and leaf lettuce ($56 mil).



Source: USDA-FAS GATS

U.S. Organic Imports

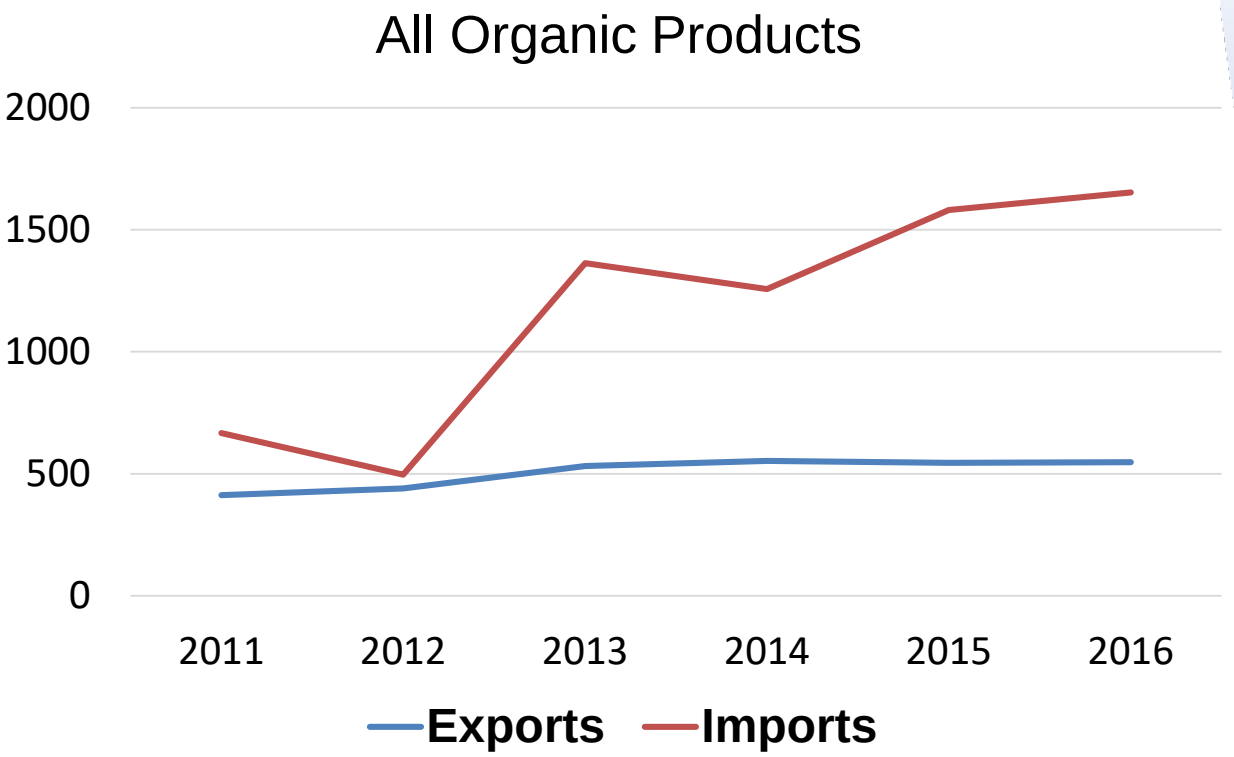
The top 8 organic imported products in 2016 (below) accounted for 76% of all import value. Of these 8, two (coffee, banana) are primarily tropical crops, while two (corn, soybean) are major conventional crops in the U.S.

Product	Import Value ($ million)
Soybean	250
Coffee	241
Banana	210
Olive oil	188
Corn	160
Honey	74
Avocado	73
Apple, fresh	64

Source: USDA-FAS GATS

U.S. Organic Trade

Value of U.S. organic imports has exceeded organic exports for the past 6 years. The “organic deficit” reached a record $1.1 billion in 2016.



Source: USDA-FAS GATS

Visit our website for more information!

http://csanr.wsu.edu/pages/Organic_Statistics

Citation: Kirby, E. and D. Granatstein. 2017. Current status of organic agriculture in Washington State: 2016. Organic Trend Series, Center for Sustaining Agriculture and Natural Resources, Washington State University, Wenatchee, WA. http://csanr.wsu.edu/pages/Organic_Statistics

Photo: Sunbreak Farm website