

# Current Status of Certified Organic Agriculture in Washington State: 2017

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*Photo: C. Miles*

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In cooperation with Washington State Department of Agriculture, Oregon Tilth and CCOF



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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 2017 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.





# 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 most recent data are for 2016.

The organic market overview for 2016 shows global sales of organic food of US\$89.7 billion, up 10% from the previous year. The U.S. was the largest single country market (\$43 billion), followed by Germany (\$10.4 billion), France (\$7.8 billion), China (\$6.3 billion), and Canada (\$3.6 billion). Switzerland was the country with the highest per capita organic expenditure, at about 6% of total food dollars (slide [5](#)).





# Consumer Demand for Organic Food

Global market, 2016 - US\$89.7 billion

## Leading countries (billion \$):

USA	43.0
Germany	10.4
France	7.8
China	6.3
Canada	3.6

## Per capita consumption of organic:

Switzerland	274 €/yr (~6% of food \$)
Denmark	227 €/yr
Sweden	197 €/yr
U.S.	117 €/yr



Source: World of Organic Agriculture

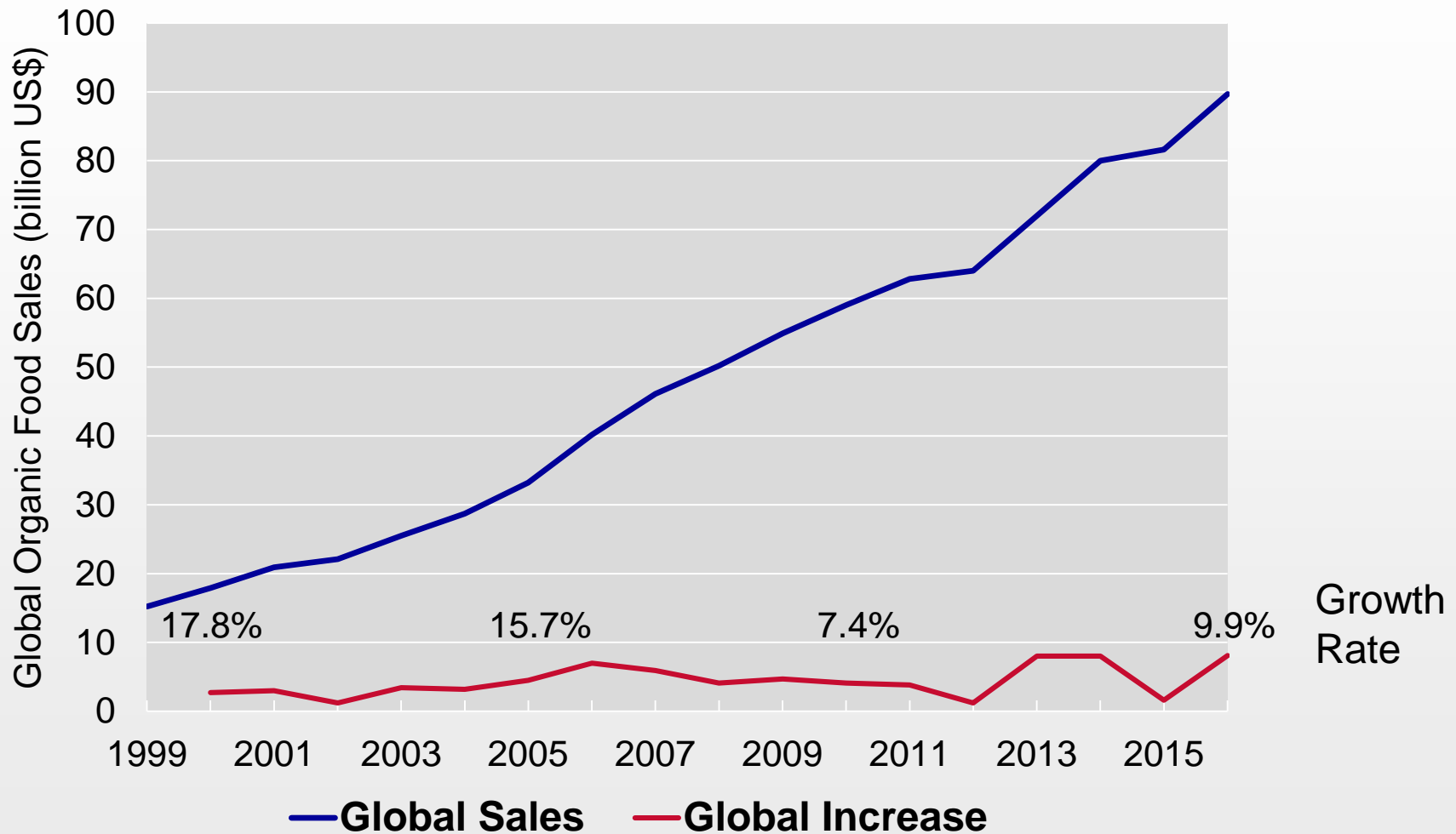


The steady increase in global organic sales ([slide 7](#)) has been driven by annual growth rates of 10-20% over the last 15 years. Even during the 2008 recession period, global growth was over 7%. Sales increased by about US\$1.1 billion in 2016 over the previous year.

North America and Europe have accounted for over 90% of organic sales worldwide for the past decade ([slide 8](#)). The “Other” category has grown in recent years, particularly driven by expanding Asian markets. These markets are expected to continue their growth, 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.



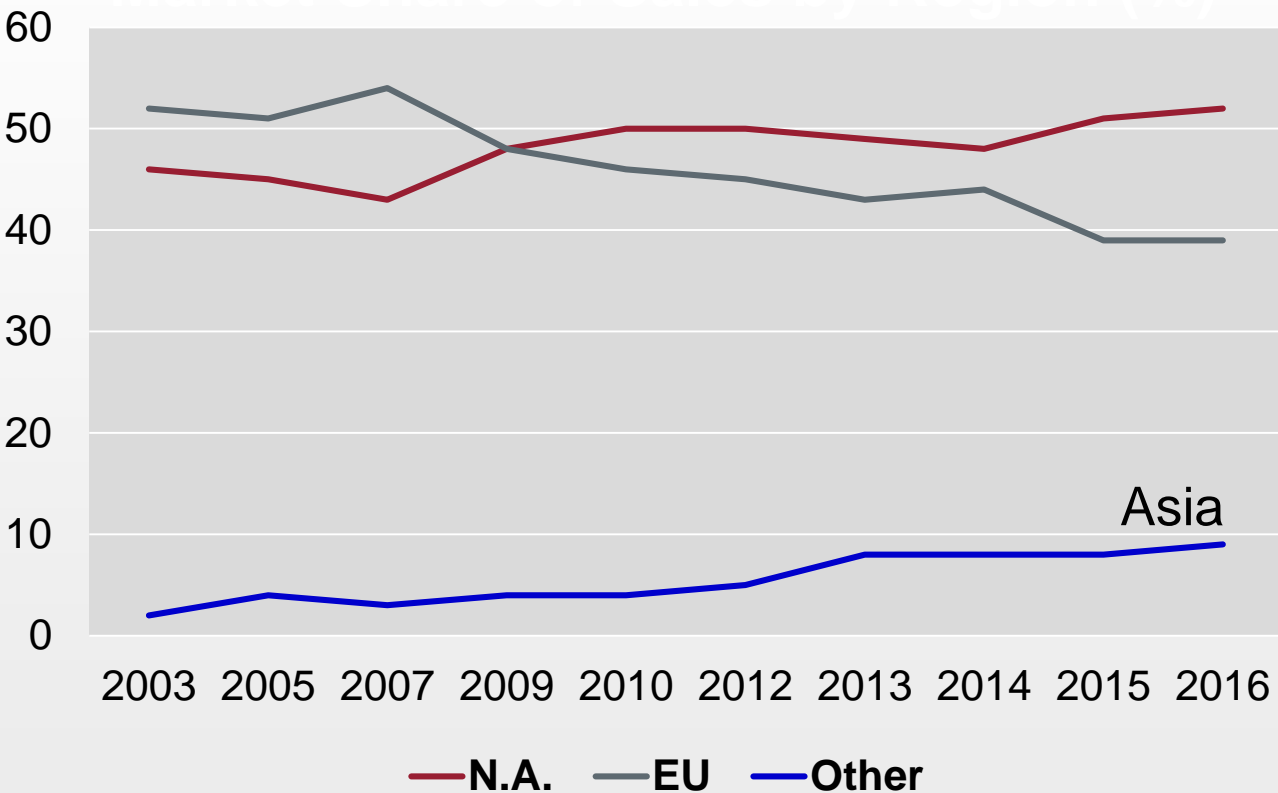
# Consumer Demand for Organic Food





# Consumer Demand for Organic Food

Market Share of Sales by Region (%)



Note: % has changed in part due to US\$ vs euro currency fluctuations. N.A.=North America. EU=European Union





In 2016, there were an estimated 142.8 million acres of agricultural land (cropland, permanent grassland, other) under organic management worldwide, up 13% from 2014, and equaling about 1.2% 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 71% in permanent grassland. North America had 7.6 million ac of organic agricultural land, of which 38% was arable land. From 2011 to 2016, global organic arable land grew from 13.6 million ac to 26.2 million ac (+93%), and permanent crop land grew from 5.9 million ac to 11.1 million ac (+88%). 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	0.6%	Coffee	8.5%
Oilseeds	0.6%	Grapes	5.3%
Vegetables	0.7%	Temperate fruit	2.0%



Source: World of Organic Agriculture



# 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 U.S. retail sales value ([slide 11](#)), and capture most market channels including farmers markets, CSAs, internet, and exports. Growth of organic food sales in 2017 slowed both in terms of percentage and actual dollars compared with the previous year.

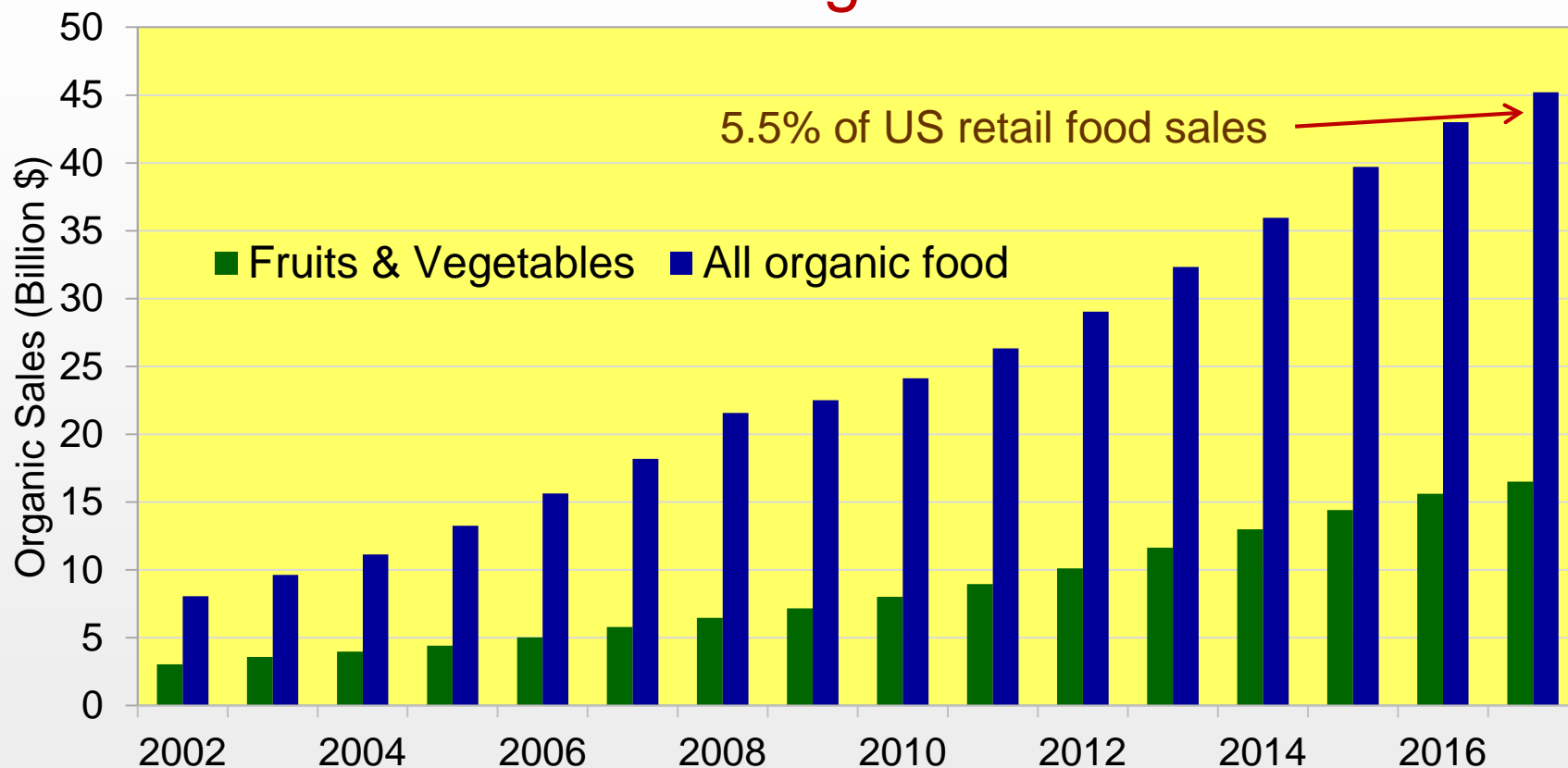
The USDA is increasing its data collection on the organic sector. The Agricultural Marketing Service (AMS), which also houses the National Organic Program, collects data on different crops, livestock and livestock products, market channels, product volume, and price ([slide 12](#)). The Economic Research 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, 2015 and 2016. They also polled certifiers for crop specific acreage, 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 **6.4%** in 2017.

Organic fruits and vegetable sales increased **5.3%** and were **36%** of all organic food sales; over 90% were sales of fresh produce.





# 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.nass.usda.gov/Surveys/Guide to NASS Surveys/Organic Production/index.php](https://www.nass.usda.gov/Surveys/Guide%20to%20NASS%20Surveys/Organic%20Production/index.php)

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](#) . Current information on certified farms and companies by state and products. No acreage data at present.





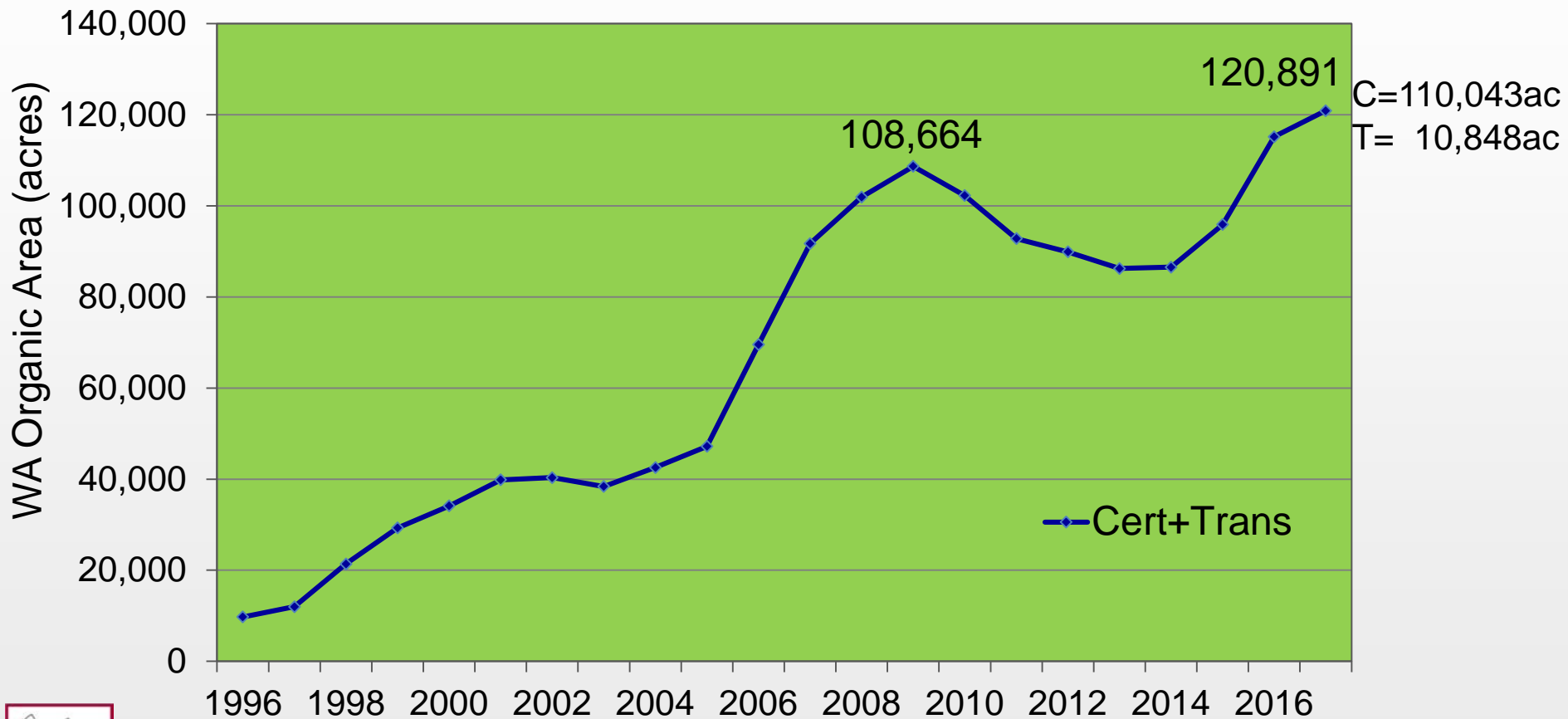
# Washington State Trends

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 then reached a new high in 2017, with certified area up about 17% from 2015 to 2016, and an additional 3% in 2017 ([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% from 2015 to 2016 to reach 8,153 acres. In 2017 transition area increased to 10,848 acres, including minor acreage pending organic certification.

Forages, Vegetables, and Tree Fruit have been the leading crop categories in terms of acres for many years, and remained so in 2017 ([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 2005-2017.  
WSDA only 1995-2003; additional data added from other certifiers beginning in 2004.



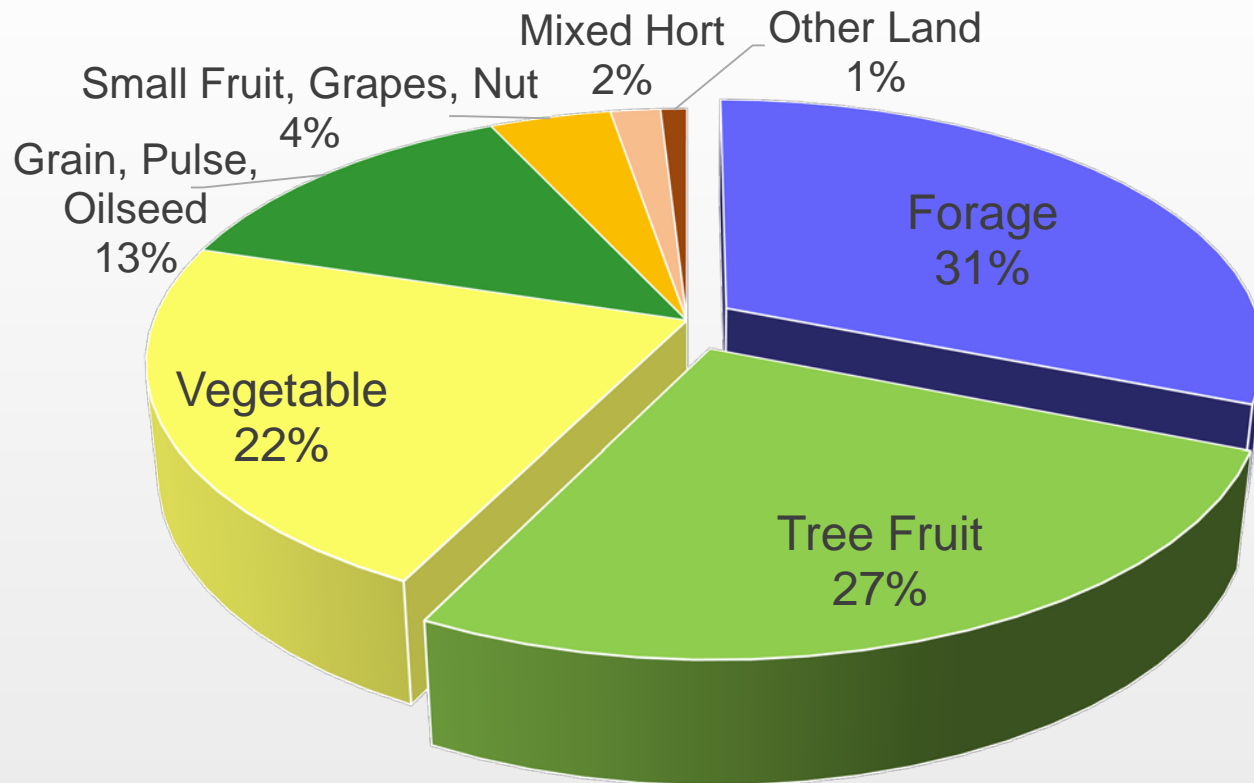
# Certified Organic Crop Acres Washington State

	Acres			% Chg 16-17	% of total
	C 2016	C 2017	T 2017		
Forage	32,615	33,698	1,685	3.3	29.2
Vegetable	24,639	24,282	974	-1.4	21.1
Tree Fruit	21,771	28,624	5,827	31.5	24.8
Grains/Dry Beans/Oilseeds	19,114	14,332	992	-25.0	12.4
Small Fruit, Grapes, Nuts	4,762	4,643	895	-2.5	4
Herbs	1,342	1,261	--	-6.0	1.1
Other crops	559	650	4	14.2	0.6
Fallow	66	71	30	7.6	0.1
Other land	782	927	3	18.5	0.8
Total crop + dbl crop + other land	105,660	108,488	10,410	2.7	--
Undefined land	8,291	6,784	433	-18.2	5.9
Total acres + dbl crop	113,951	115,272	10,843	1.2	--

C=certified; T=transition; % Chg is change in certified acres from 2016 to 2017; % of total is for 2017 certified acres. 2017 combined certifier data includes an estimated 5,083 ac of double crop; **certified site area = 110,043 ac**; 2016 data include estimated 6,948 ac double crop; 2016 certified site area = 107,003 ac.



# Distribution of Certified Organic Acres Washington 2017



Certified crop acres\*: 108,488

\*includes double crop but not 6,775 ac  
undefined land

Transition crop acres: 10,410

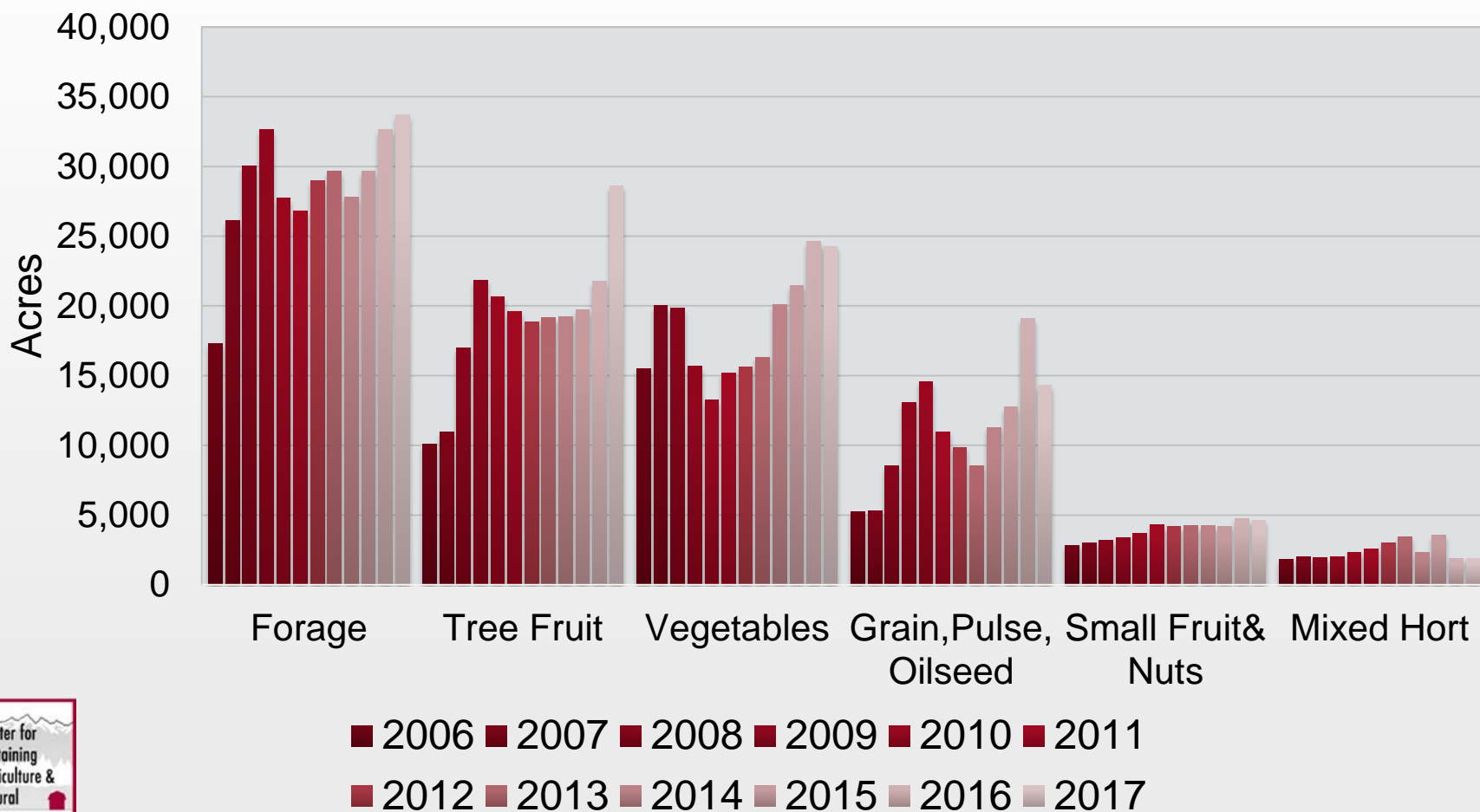
not including 433 ac undefined land

Total certified site area = **110,043 ac** (e.g.  
includes undefined land not tracked as crop)

Combined certifier data



# Distribution of Certified Organic Acres Washington State



Combined certifier data; double crop acres included

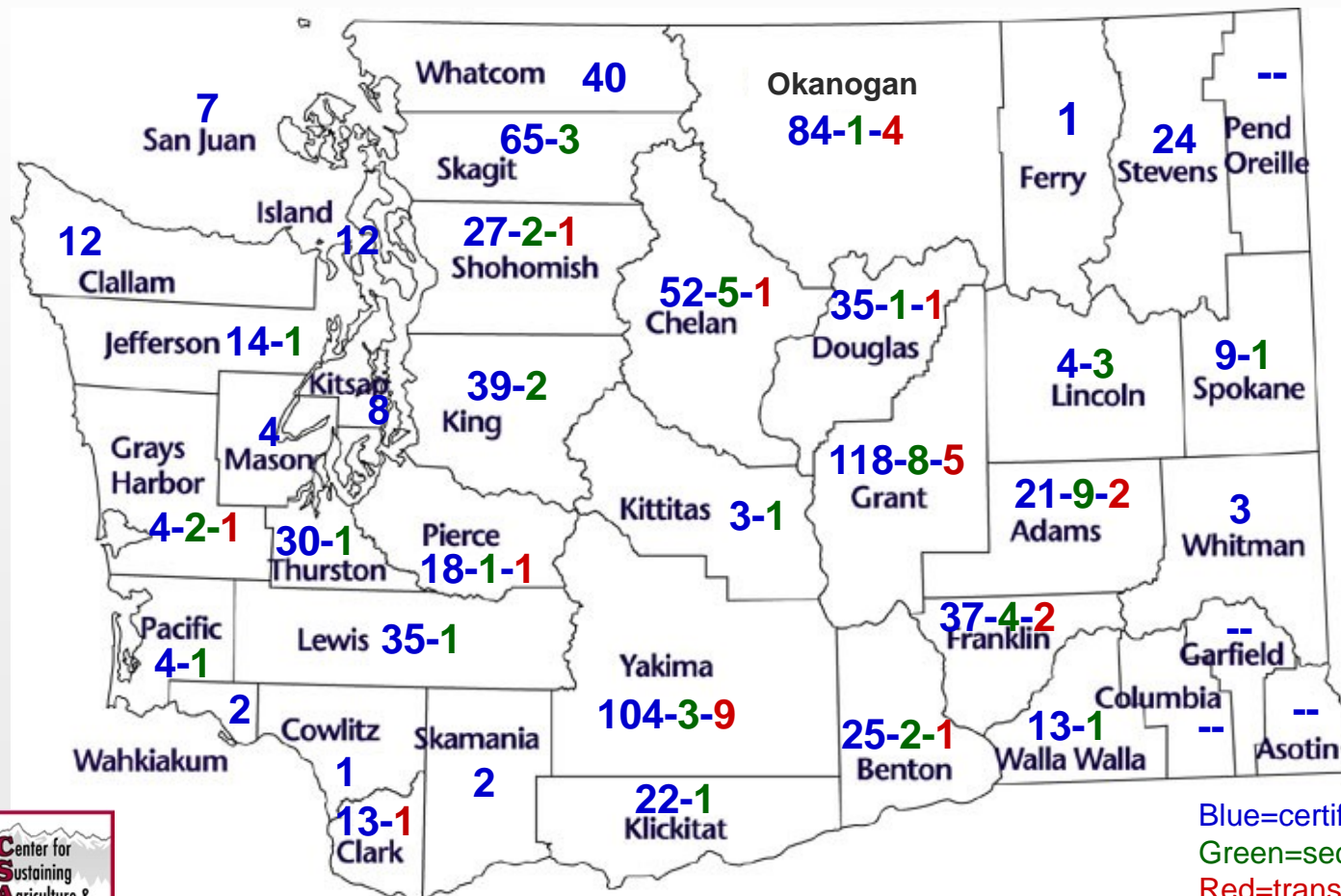


The **spatial distribution** of organic farms in Washington by county is shown by farm number ([slide 19](#)) and area ([slide 20](#)). Four counties showed no certified farms in 2017. Grant County had the highest number of certified farms and acres. Statewide, **892** farms were certified organic in 2017, with another **29** farms registered as transition or pending only. Eastern WA counties had **62%** of the certified farms by number and **71%** 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 2017. 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 in 2016 was on existing certified farms in eastern WA ([slide 23](#))



# 2017 Number of Certified Farms by County



# Farms  
892 certified  
29 transition only

Eastern WA  
62% of farms

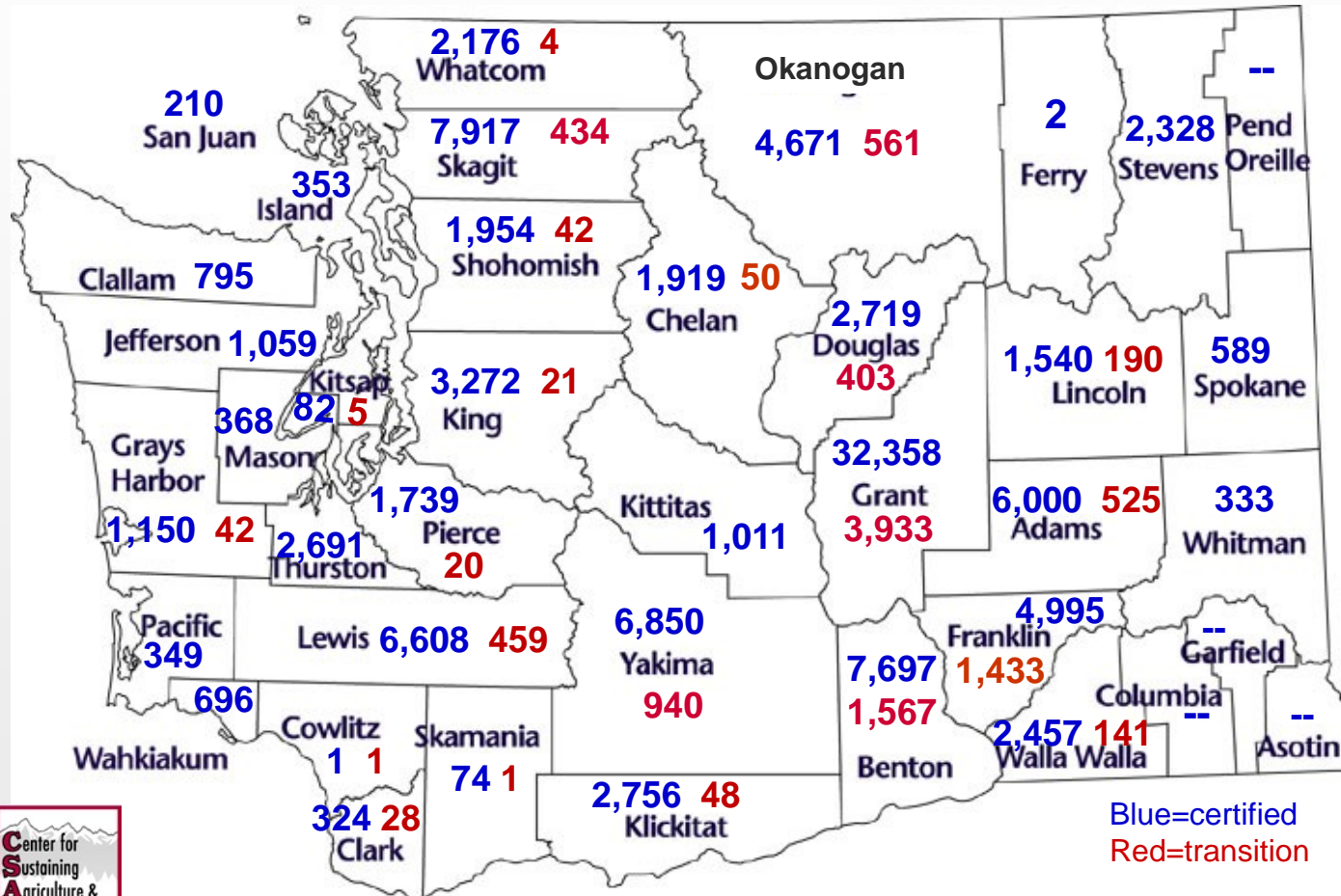
Western WA  
38% of farms

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.  
T only value may include a few farms pending certification



# 2017 Certified Farm Area by County (acres)



Area\*  
Cert 110,043 ac  
Trans 10,848 ac

Eastern WA  
71%  
of certified ac

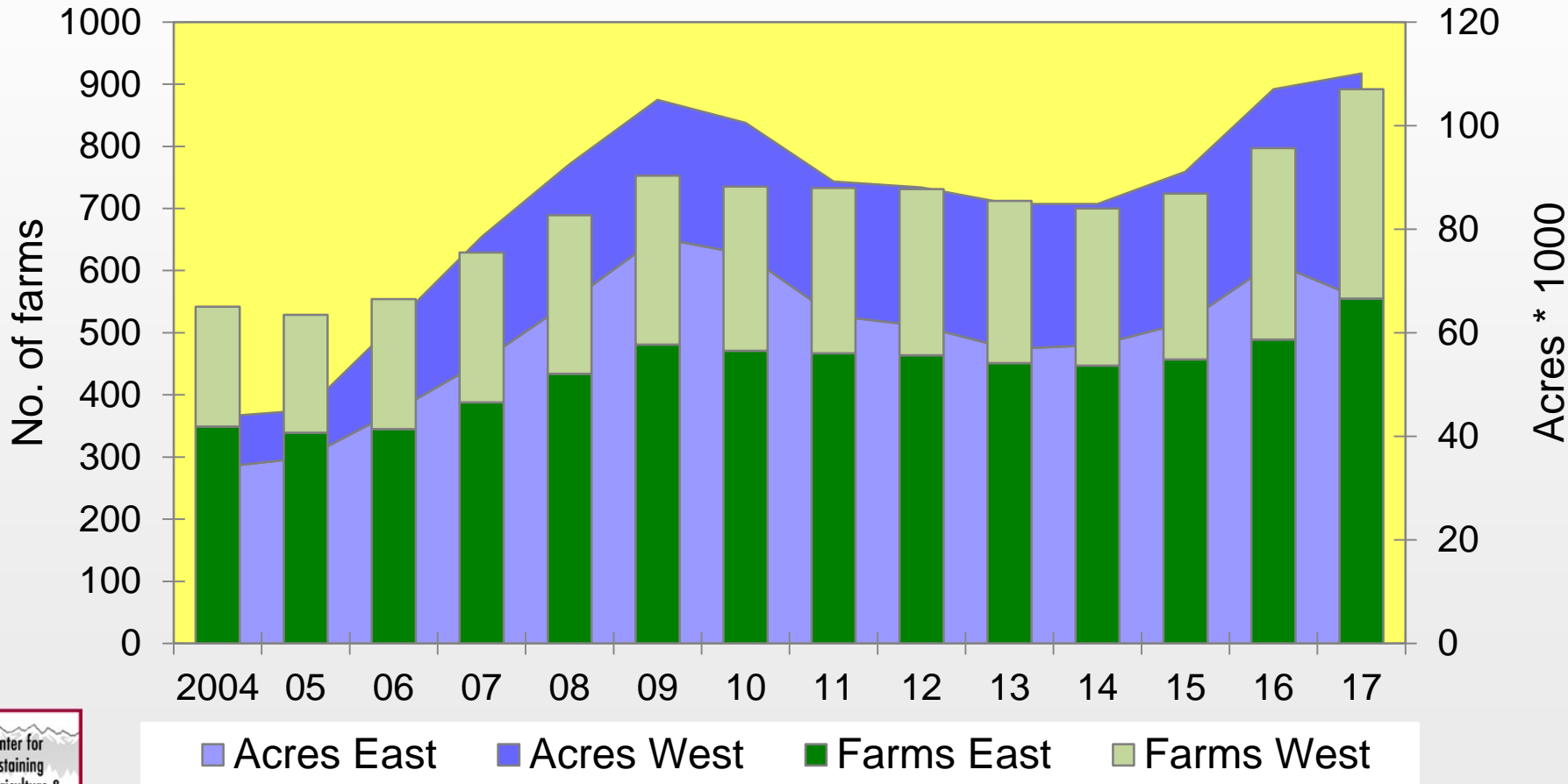
Western WA  
29%  
of certified ac



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



# Certified Farms and Area by Region Washington State



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



# Organic Farm Site Area Washington State



Photos: Organic Trade Assoc.

	2009	2012	2013	2014	2015	2016	2017
Site area	Acres						
Certified	104,962	88,072	84,868	84,848	91,088	107,003	110,043
Transition	3,703	1,817	1,386	1,676	4,800	8,153	10,848
No. of producers <sup>a</sup>	753-10	731-3	712-4	700-7	724-22	797-34	892-29

<sup>a</sup> 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.



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 total organic crop acreage, 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 reach 26,000 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 20%, respectively, of all acres of those crops grown in the state.





# Organic Tree Fruit Acres Washington State

	--- Certified acres ---								Trans acres†
	2010	2011	2012	2013	2014	2015	2016	2017	2017
Apple	14,790	14,296	13,657	14,030	14,052	14,283	16,191	22,116	5,244
Pear	2,033	1,917	1,900	1,820	1,843	2,050	2,243	2,763	343
Cherry	2,147	1,827	1,792	1,850	1,939	2,056	2,078	2,546	216
Apricot*	299	296	266	285	299	260	251	216	10
Nectarine	550	528	488	464	440	395	379	357	7
Peach	701	619	618	594	580	553	553	580	1
Plum/Prune*	125	92	89	64	58	56	76	45	6
Mixed stone	13	17	45	22	17	32	--	1	--
Total*	20,658	19,592	18,855	19,129	19,228	19,685	21,771	28,624	5,827

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

†only those acres registered with a certifier; 2017 certified value includes a small number of acres pending certification

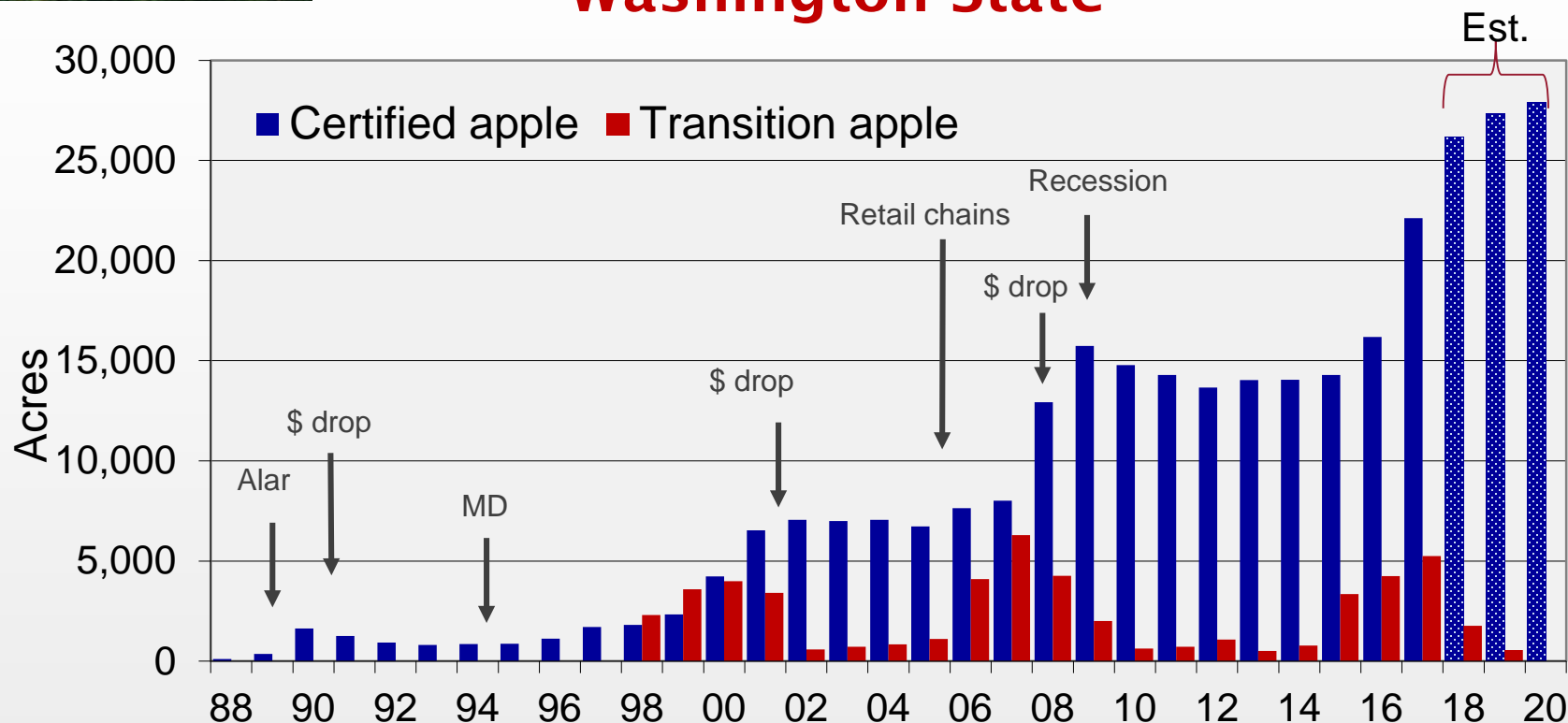
Organic tree fruit accounted for about **12%** of  
all tree fruit acres in Washington State in 2017.

Combined certifier data



Photo: F. Peryea

# Organic Apple Acreage Washington State



Cert. organic apples = 12% of WA apple bearing  
acreage (based on 2017 NASS value of 179,146 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).



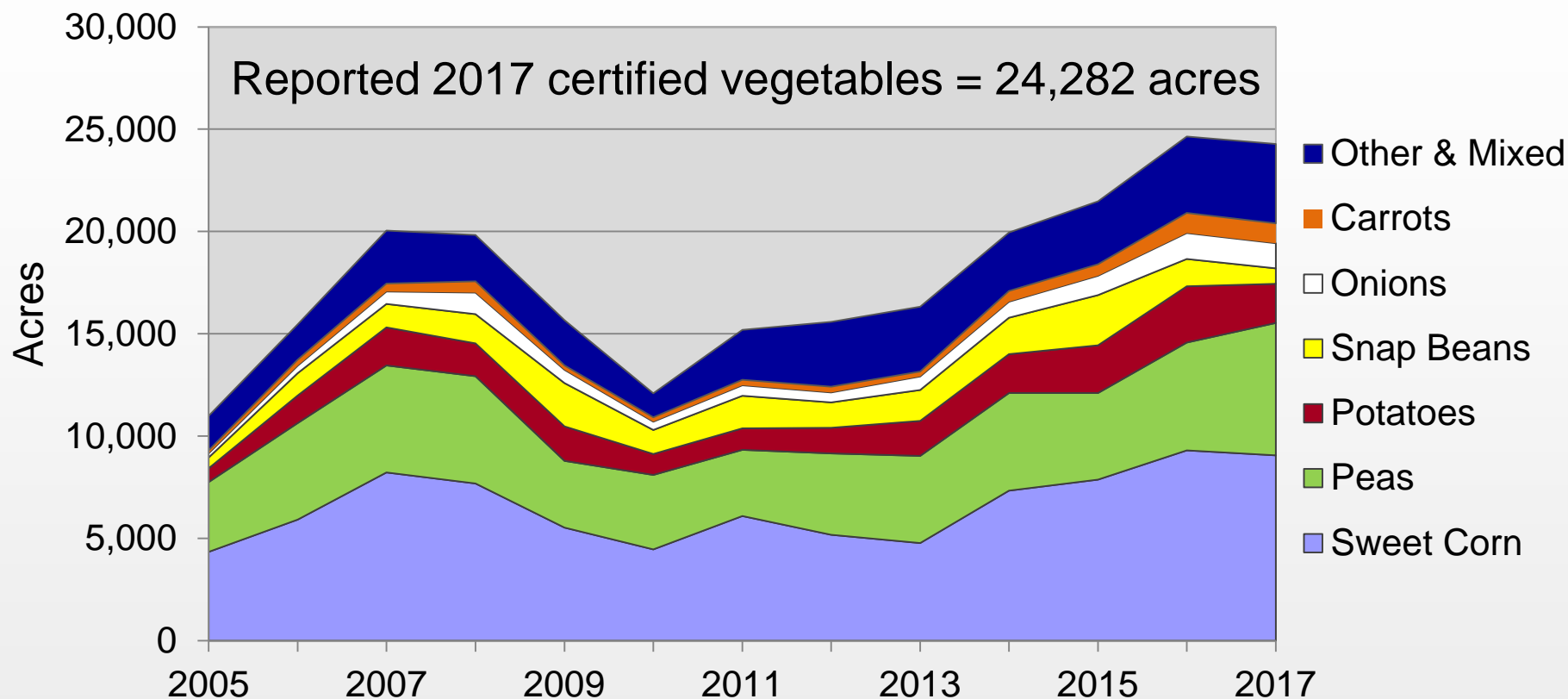


More information on Washington organic tree fruit statistics  
is available on-line at:

<http://tfrec.cahnrs.wsu.edu/organicag/organic-statistics/>



# WA Organic Vegetable Acres



Estimated organic acreage share: Sweet corn 10%; Peas ~20%

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

*Combined certifier data*





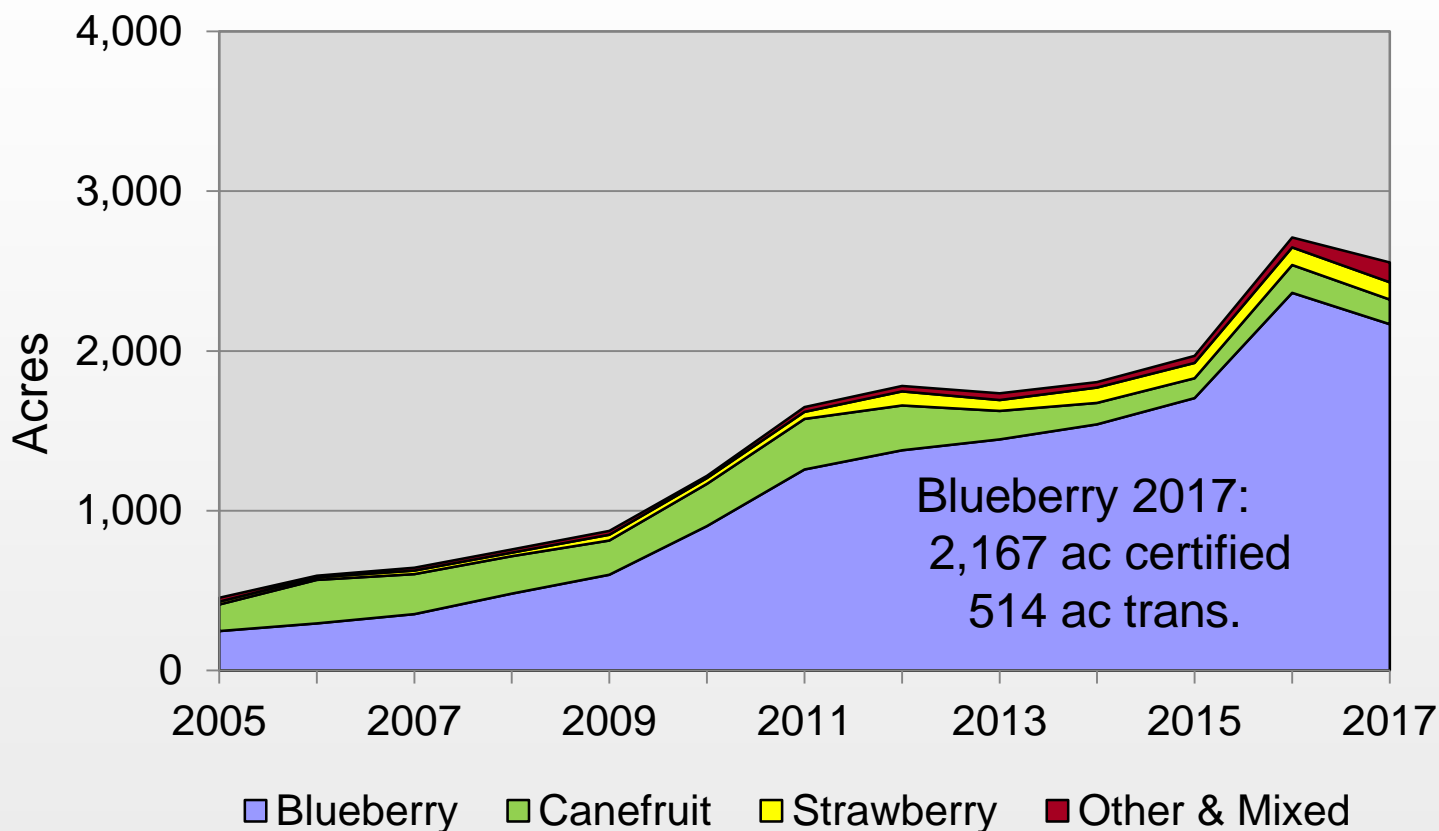
Blueberries account for the largest share of **organic berries** in the state ([slide 30](#)). Blueberries in general have experienced tremendous growth in recent years, and much of the growth has occurred in irrigated central Washington as opposed to the traditional western Washington growing area, due to less disease in the dry climate. Global demand for blueberries, including 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') historically dominated **organic grape production** in the state ([slide 31](#)), but declined as organic wine grapes expanded and leveled off. There is very little organic table grape production in the state. NOP-certified organic wineries must label finished wine as "wine made with organic grapes" rather than as "organic" if sulfites, a standard wine stabilizer, are added. High quality grapes grown with organic methods (not certified or labeled organic) are also used to produce premium wines. More information can be found in [Trends and Economics of Washington State Organic Grape Production](#).





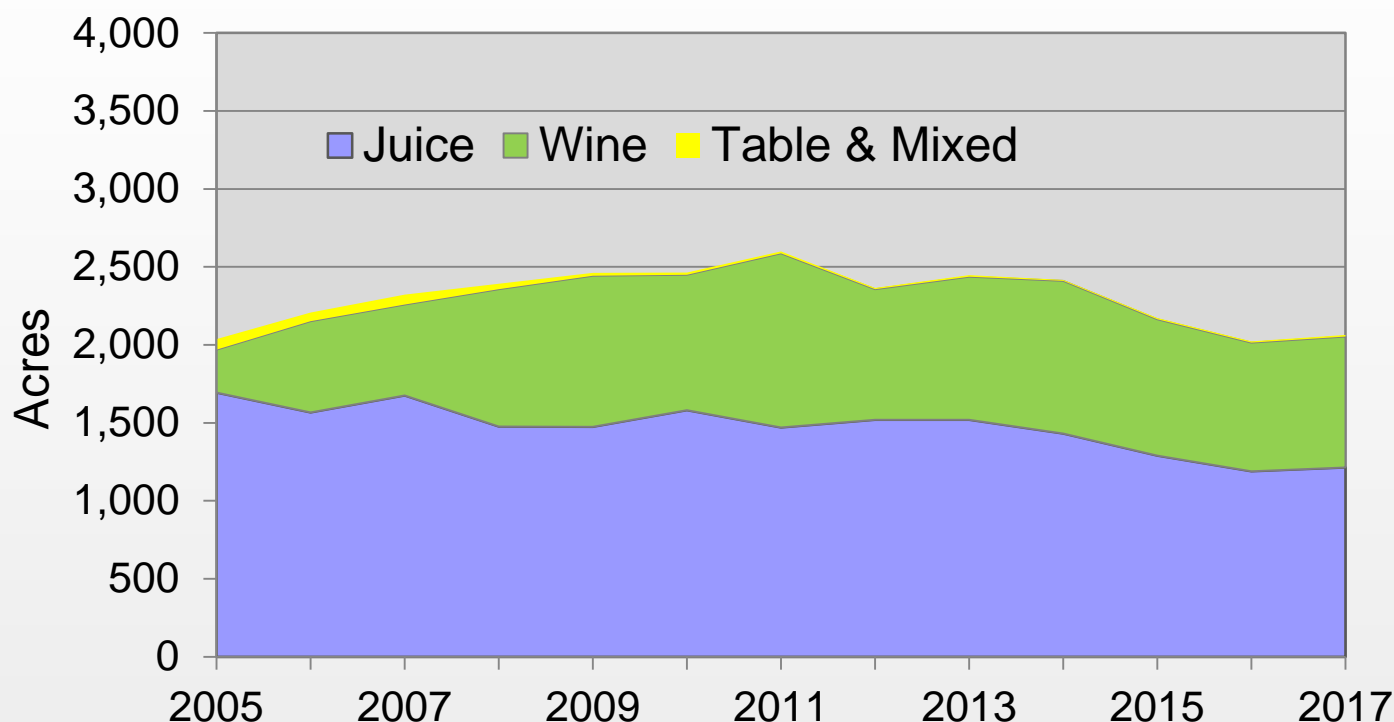
# Washington Organic Berry Acres



Organic is ~16% of total WA blueberry acreage (using 13,400 harvested ac state total from NASS 2016).



# Washington Organic Grape Acres



Reported 2017 total certified grapes = 2,064 acres  
(Concord = 56%)

Estimated organic share of WA grape acreage = 5.6% of  
juice and 1.5% of wine grapes





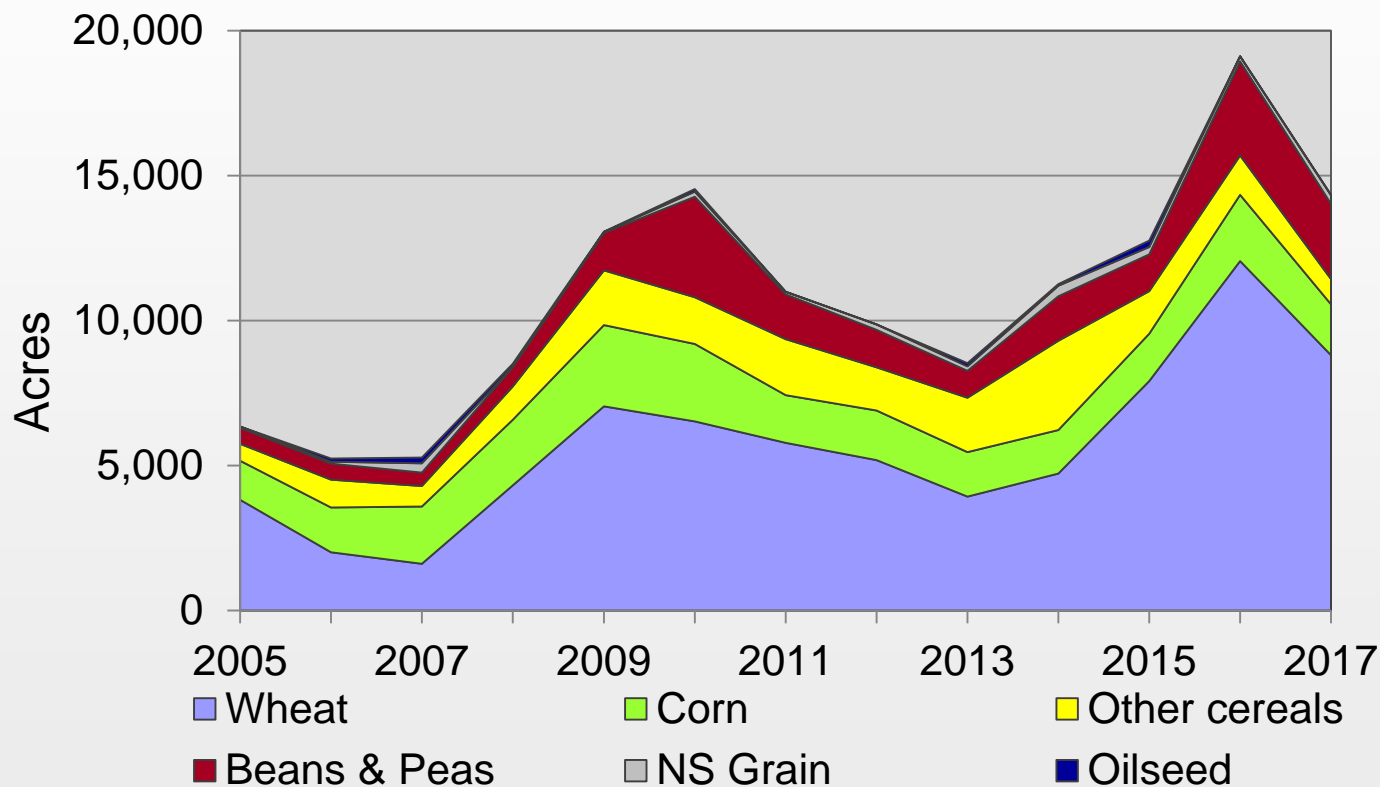
Washington is a major grain producer with extensive wheat production in the dryland regions of eastern Washington. However, it lags behind other states such as Montana and North Dakota for organic wheat production. While demand and prices for **organic grains** are currently high, dryland organic cereal 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 wheats, 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.





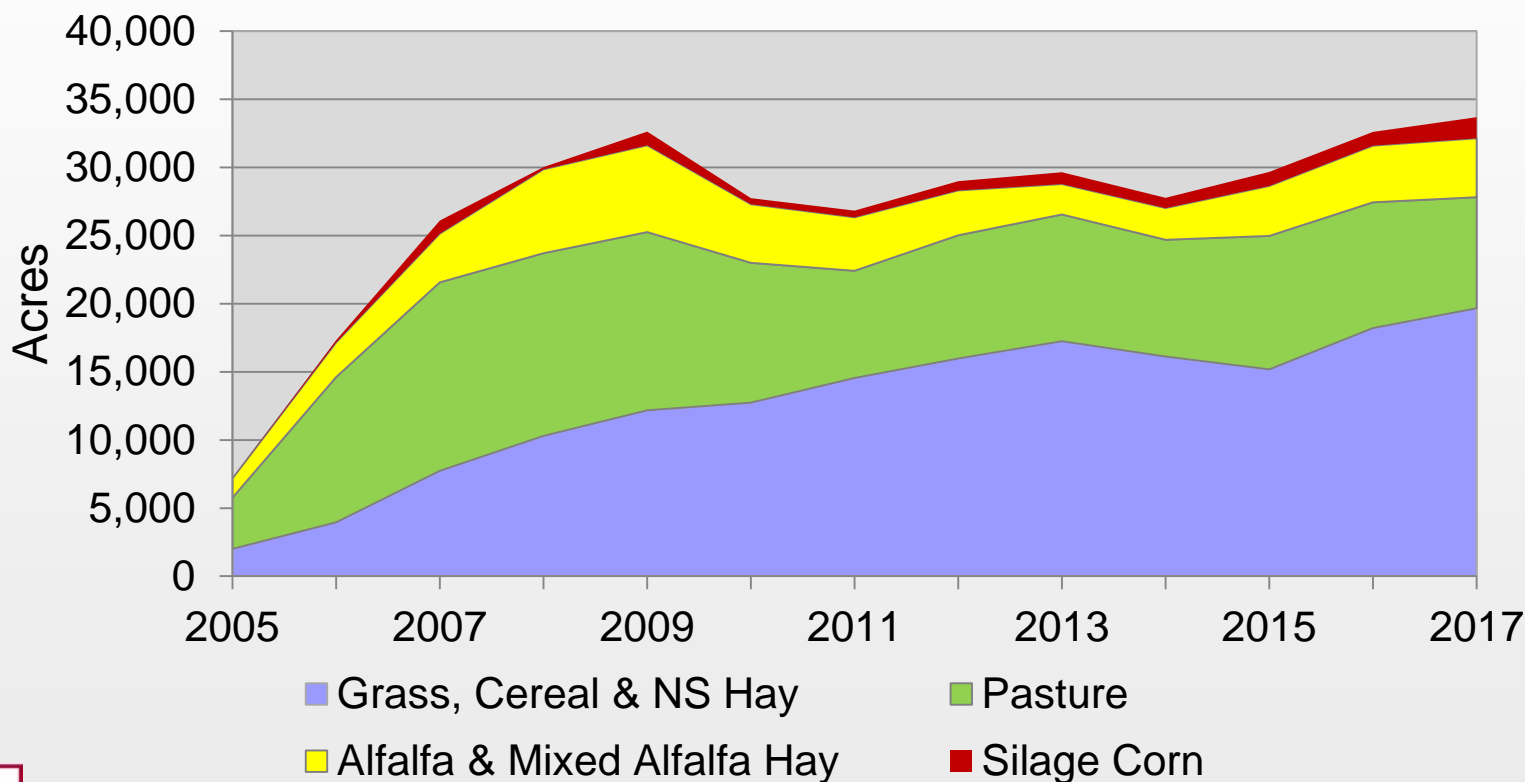
# Organic Grain, Pulse & Oilseed Acres Washington State



Reported 2017 organic grain, pulse and oilseed = 14,332 acres



# Organic Forage Acres Washington State



Reported 2017 WA organic forage total = 33,698 ac; much of the hay ground is also cut as silage, haylage or greenchop, or grazed as pasture



**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 3.5% of the state dairy herd in 2017.

There were 50 certified dairies in 2017. Total number of organic dairy stock surpassed 16,000 in 2017, including milkers, dry cows, replacement heifers and calves. Statewide organic milk production rose an estimated 82% from 2011 to 2017, both from increased number of cows and from higher per cow production ([slide 38](#)). Demand for organic milk was steadily increasing nationwide, but recently supply-demand imbalances have appeared.





# Estimated Organic Dairy Cows Washington State

	- - - - -Number Certified - - - - -						
	2006*	2008	2010	2014	2015	2016	2017
Milkers & dry	2,970	9,022	5,898	7,505	8,290	9,012	9,707
Calves & Replacement heifers	2,180	7,022	4,154	5,514	5,308	6,033	6,469
Total	5,150	16,044	10,052	13,091	13,598	15,045	16,176
No. organic dairies	23	46	34	38	39	45	50

There were also 2 certified organic goat dairies in 2017



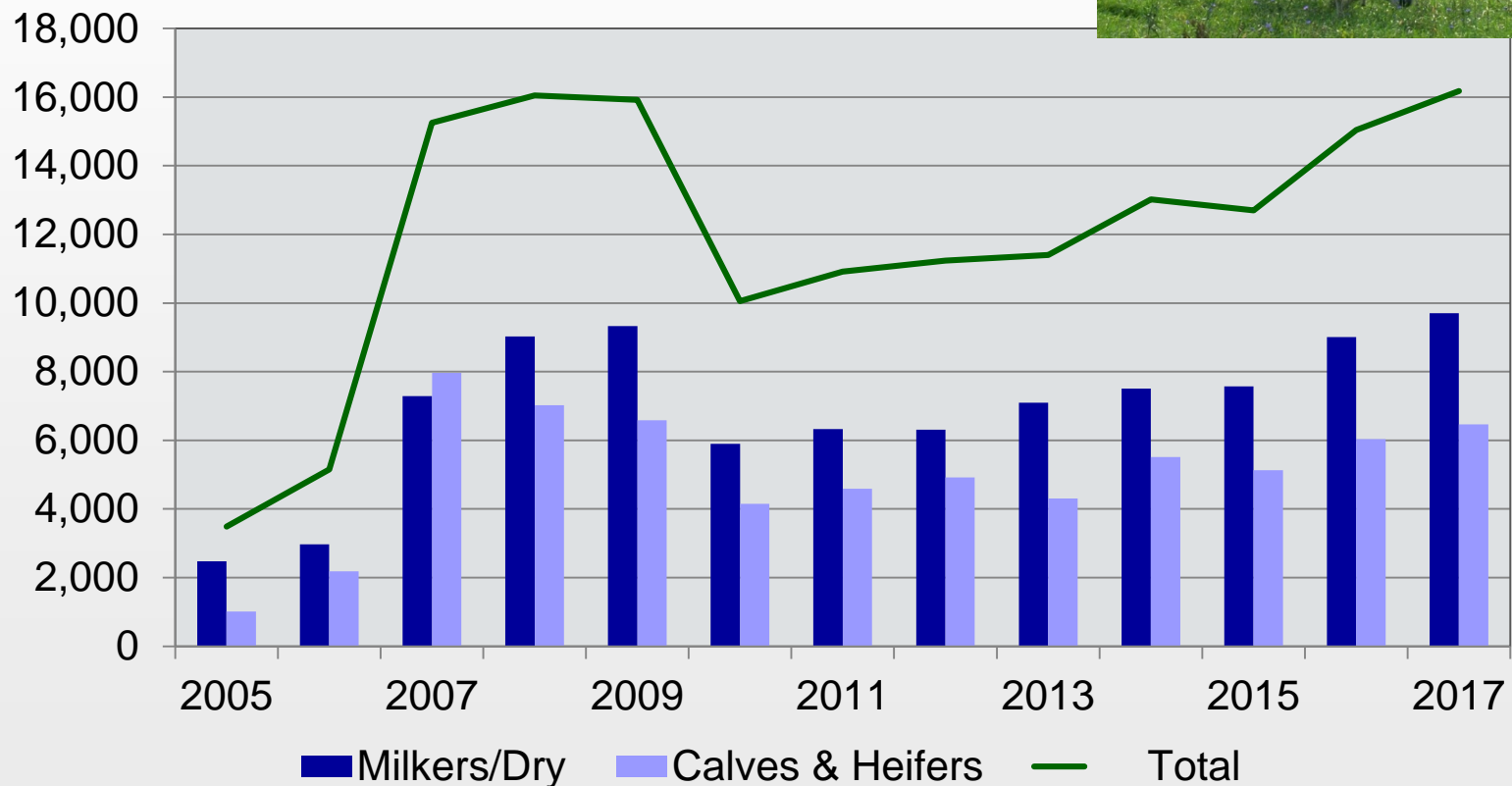
*Photo: Organic Valley*

**Organic dairy cows represented 3.7% (2008) and 3.5% (2017) 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 Cow Numbers Washington State





# Organic Dairy Sector Washington State



## Trends - 2011 to 2017 2016

No. of certified cow dairies +52%  
No. of milkers/dry cows +53%  
No. of calves & replacements +41%

	<u>2011</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
No. of dairies pending	1	6	0	0
No. of milk cows in transition	150	>506	0	0
Ave. lb milk per cow per month*	1,187	1,638	1,590	1,455
Est. statewide monthly production (million lb milk)	6.91	10.93	11.77	12.61

\*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 annual organic surveys (2014, 2015, 2016) did gather livestock data, and these are compared for WA in [slide 40](#). The value of livestock and livestock product sales were 25%, 26%, and 16% of total organic sales in the state in 2014, 2015, and 2016, respectively. This is lower than the U.S. average of 42%.

Washington was #8 in organic milk production, and #10 in organic eggs in 2016 ([slide 41](#)). Organic egg production in the state jumped 72% from 2014 to 2015, but then declined 73% in 2016 compared to 2015. There are also large organic broiler producers in the state; WA ranked #3 for organic broilers sold in 2016. Year to year variance may also be affected by varying data collection methods or response rate; if a single large producer does not respond to a survey, annual results could vary widely.

Organic poultry numbers in the U.S. nearly doubled (+97%) from 2015 to 2016; US organic hogs and pigs inventory increased 60% whereas sheep and lambs, and cattle grew 16% and 14% respectively.



# WA Organic Livestock

- - - % of total state / US organic sales - - -

	WA			US		
	2014	2015	2016	2014	2015	2016
Livestock sales	--	6%	6%	12%	12%	15%
Livestock product sales	--	19%	10%	28%	31%	29%

<u>2016 WA</u>	<u># inventory</u>	<u># sold</u>	<u>Sales \$</u>
Milk cows	9,211	2,063	2.45 Mil
Beef cows	1,157	164	186 K
Other cattle, calves	6,581	4,901	3.95 Mil
Layers	563,523	*(nd)	(nd)
Broilers	914,760	4.6 Mil	30.6 Mil
Goats, Kids	497	178	22.5 K

\*nd: not disclosed

Sources: USDA NASS 2014, 2015, 2016 Certified Organic Surveys  
and 2008 Organic Production Survey

8.9 mil dozen in 2016;  
33.6 mil dozen in 2015;  
4.6 mil doz. in 2008



## WA Organic Livestock

	<u>2015</u>	<u>2016</u>
Livestock and poultry sales	\$40.7 mil	\$37.4 mil
Livestock and poultry product sales	\$121.5 mil	\$65.5 mil
U.S. rank	5	8
% of U.S. sales	6%	3%
Organic milk production	93.6 mil lb	128.7 mil lb
Organic milk sales	\$31.0 mil	\$43.9 mil
U.S. rank	10	8
% of U.S. sales	--	3%
Organic egg sales	\$86.9 mil	\$21.5 mil
U.S. rank	1	10
% of U.S. sales	12%	3%



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 88% of farmgate sales coming from 71% of certified acres ([slide 43](#)). Total sales grew substantially from 2010 to 2016, but leveled off in 2017 perhaps due to lower organic apple prices. Leading organic sales were Grant County (\$181 million) in eastern Washington and Skagit County (\$27 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 43% of farms have annual sales less than \$100,000, and in aggregate, these farms account for only 1.3% of all organic sales in the state (slide [46](#)). Farms with more than \$1 million in sales (21% of farms) accounted for 82% of organic sales in 2017, down slightly from the previous year perhaps due to declining prices for organic apples ([slide 47](#)).

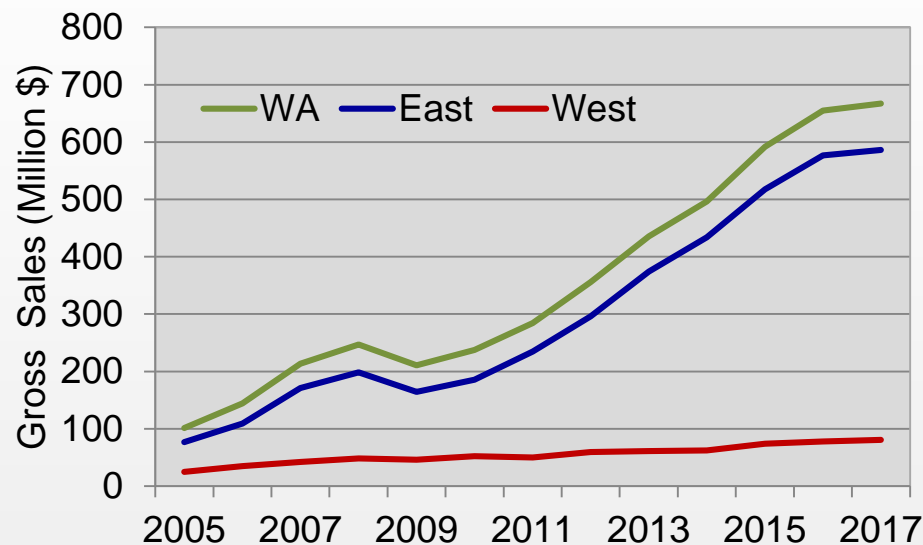




# Trend of Farmgate Sales Value

## Cert. Organic Crop and Animal Products

### Washington State Producers



-----2017-----				
	Million \$	% +/- 2016-17	% of \$	% of acres
East	586	2	88	71
West	81	3	12	29
Total	667	2	100	100



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.



# 2017 Farmgate Sales

Certified organic crop & animal products

Eastern WA county estimates



Photo: WSU Small Farms Program

	\$ Million
Grant	180.9 ↓
Yakima	71.6 ↑
Benton	60.2 ↓
Adams	56.8 ↑
Okanogan	52.2 ↑
Walla Walla	50.0 ↓
Franklin	45.5
Chelan	32.9 ↑
Douglas	24.5 ↑

	\$ Million
Klickitat	8.3 ↓
Stevens	1.1 ↓
Whitman	0.2 ↑
Spokane	0.1 ↓
Ferry, Kittitas & Lincoln 2017 sales not disclosed to protect confidentiality.	

\$586 MIL total East

88% of state sales

\$667 MIL total WA

Arrow indicates direction of sales change from previous year

Yakima Co. up 38%; Benton and Grant Cos. down 9%, and 7% compared to 2016

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



# 2017 Farmgate Sales

Certified organic crop & animal products

Western WA county estimates



	\$ Million
Skagit*	26.9 ↑
Lewis	11.0
King	9.8
Thurston*	9.6
Whatcom*	5.4
Snohomish*	5.2
Pierce*	2.8
Jefferson	2.3
Grays Harbor	1.7

	\$ Million
Clark	1.6
Kitsap	0.7
Island	0.5
San Juan	0.1
Clallam, Cowlitz, Mason, Pacific, Skamania & Wahkiakum not disclosed, to protect confidentiality.	

\$81 MIL total West (12% of total)  
12% of state sales  
\$667 MIL total WA

Skagit Co. up 16% compared to 2016

\*Significant egg, broiler, and mushroom production sales value not available or not disclosed for these counties, totaling >\$50 mil. WSDA & OTCO data. County sales are estimates (sales reported for county may include sales from sites in other counties).



# Organic Farm Economic Class (by Sales) Washington\*

Annual Gross Sales Class	% of Farms				% of Sales			
	2006	2010	2015	2017	2006	2010	2015	2017
<25K \$	38	31	21	24	1	1	0.2	0.3
25-100K \$	24	22	21	19	5	3	1	1
100-250K \$	15	17	14	13	10	8	2	2
250K-1MM \$	17	21	21	24	33	32	11	14
>1MM \$	6	9	24	21	51	56	85	82

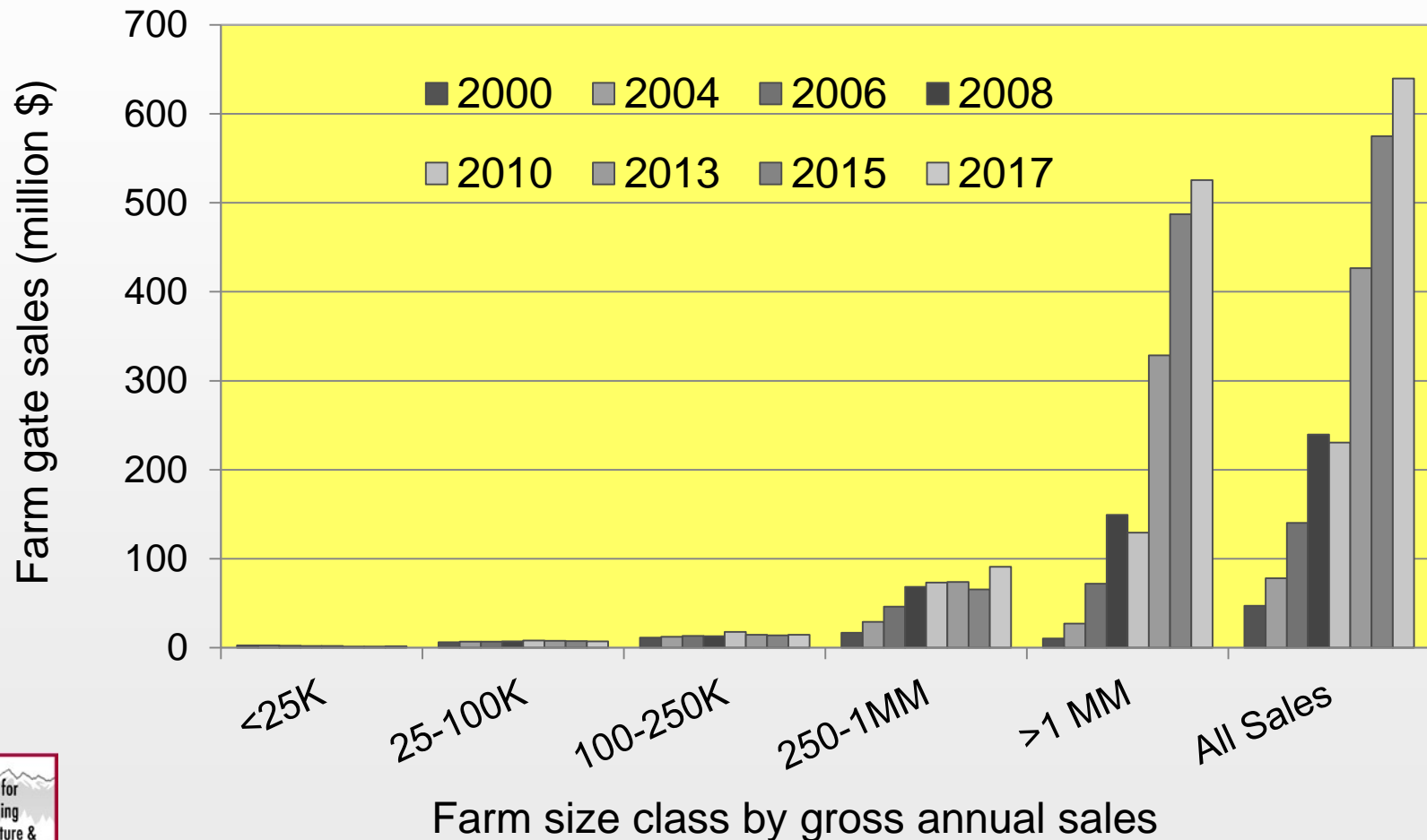


Photo: WSU Small Farms

\***WSDA certified farms only.** Gross farmgate sales in dollars. 715 farms reported sales for 2017. Sales do not include values from new applicants and farms that did not reapply during reporting year.



# Distribution of WA Organic Farmgate Sales by Sales Class\*



\***WSDA farms only.** Gross farmgate sales in dollars. 715 farms reported sales in 2017. Sales do not include values from new applicants or farms that did not reapply during reporting year.



## Comparison with NASS

The [NASS 2016 Certified Organic Survey](#) was released in September 2017. Response rate for the U.S. and Washington was 60% and 51% respectively. The U.S. data appear to underestimate acreage in 2016. WA farmgate sales were up about 2% from 2015. Using the 2016 Organic Survey data, Washington appears to have one of the highest farmgate revenues per acre (\$8,405), 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 2016 data as well (slides [50](#), [51](#)). The state is a leading producer for several fruits and vegetables, and hops.

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.

Farmgate revenue per acre was calculated using the NASS 2016 Organic Survey data: Sales value of organic crops (including nursery and greenhouse) divided by Cropland acres.





# U.S. Organic Snapshot

2016 sales: crops \$4.1bil; livestock \$1.1bil; livestock products \$2.2bil

	2014	2015	2016
No. of organic farms			
Certifier Survey	13,174	14,861	--
Organic Survey	14,093*	12,818	14,217
Certified acres			
Certifier Survey	4,081,903	5,336,058	--
Organic Survey	3,670,560*	4,361,849	5,019,496
All organic sales (mil \$)	5,456	6,163	7,553
% all US sales	1.30	1.47	1.83

\*2014 Organic Survey value includes exempt farms

2016 organic crop revenue per acre: US \$1,544 CA \$6,329 WA \$8,405

Sources: USDA NASS 2014 Organic Survey, 2015, 2016 Certified Organic Surveys; 2014, 2015 Certifier Surveys



## WA in the National Picture

2016 NASS Data	Rank	% of U.S. organic*
No. certified farms	6	5
No. certified acres	20	2
Value of commercial sales	3	8
Apples, fresh	1	93
Pears, all	1	71
Cherries, sweet	1	90
Peach, all	2	15
Blueberry, all	1	46
Grapes, all	2	7

\*by volume of production for crops

Source: USDA NASS 2016 Certified Organic Survey



## WA in the National Picture

2016 NASS Data	Rank	% of U.S. organic*
Carrots	2	6
Onions, yellow	1	36
Peas, green	1	45
Potato	2	23
Squash, all	4	7
Sweet corn	1	53
Other vegetables	4	3

\*by volume of production

Other top states:

CA #1 farms, sales, acres

PA #2 total sales

WI #2 number farms

OR #2 vegetable sales



Source: USDA NASS 2016 Certified Organic Survey



# Estimated Certified Organic Share of Washington Agriculture

No. farms (2016 data)	2.3%
Cropland (2016 data)	0.8%
Value (WSDA 2016 data)	6.2%

If organic ag was considered a single commodity, it would rank no. 5 among all Washington commodities for dollar value in 2016.



*Alvarez Farm produce: C. Donovan*



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



# Organic Trade

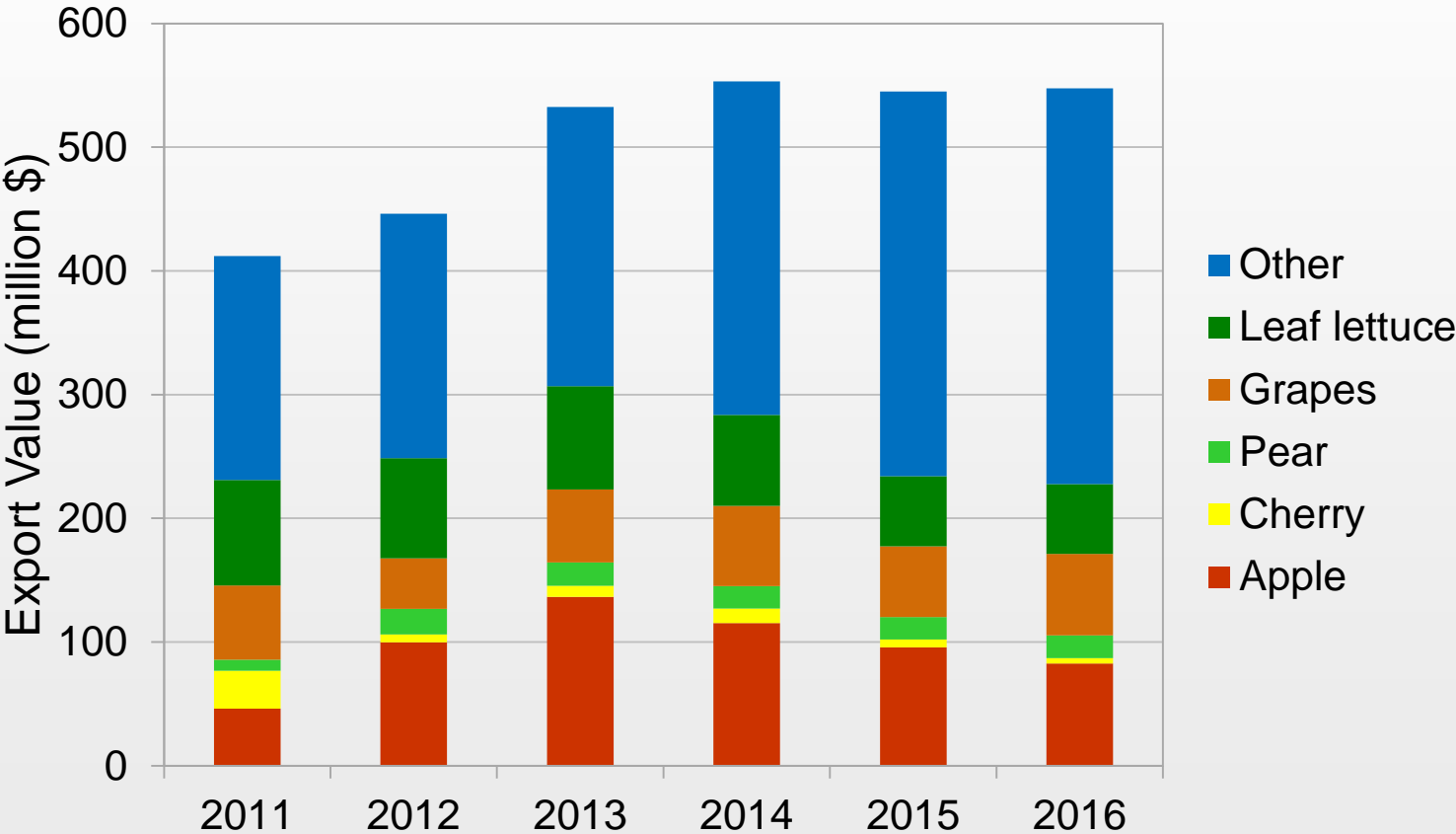
Many organic products are actively exported and imported among countries. Certain products, such as coffee and bananas that are tropical, account for significant shares of organic imports in the main North American and European markets. Estimates of U.S. organic exports and imports have been made by 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).





# 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

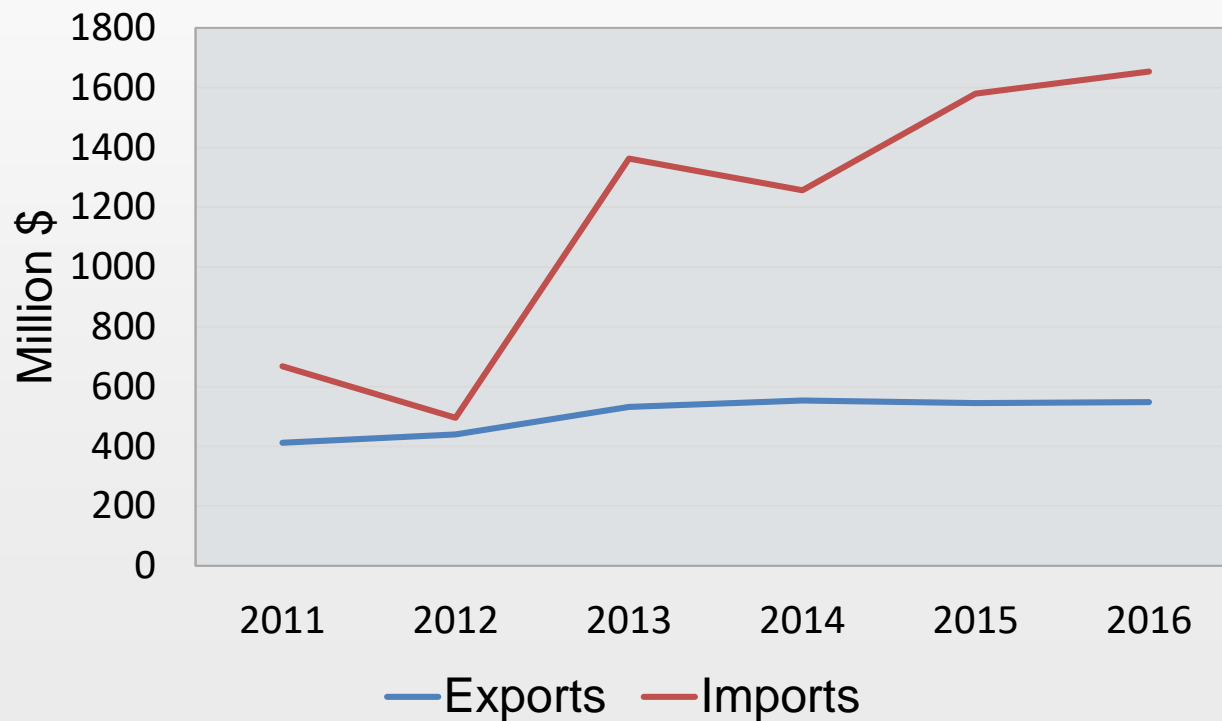




# U.S. Organic Trade

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.

All Organic Products





Visit our websites for more information!

[http://csanr.wsu.edu/pages/Organic\\_Statistics](http://csanr.wsu.edu/pages/Organic_Statistics) or  
<http://tfrec.cahnrs.wsu.edu/organicag/organic-statistics/>

**Citation:** Kirby, E. and D. Granatstein. 2018. Current status of organic agriculture in Washington State: 2017. Organic Trend Series, Center for Sustaining Agriculture and Natural Resources, Washington State University, Wenatchee, WA.