Current Status of Certified Organic Agriculture in Washington State: 2020

2020 Data: extracted 2-9-2021
Final Document date: 12-21-2021

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

Document Outline

Abbreviations used:

CSA	Community Supported Agriculture operation
NOP	USDA National Organic Program
NASS	USDA National Agricultural Statistics Service
WSDA	Washington State Dept. of Agriculture

Introduction

Washington State University 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 2020 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 91% of the NOP-certified farms in the state in 2020, and it is the primary data source. 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.

Note: Sums may not always agree for the same parameter due to data inconsistencies and errors.

12/21/21. This document contains the final farm sales data for 2020.

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 global data are for 2019.

The organic market overview for 2019 shows global sales of organic food of US$112.0 billion, up 6.6% from the previous year. The U.S. was the largest single country market ($50.1 billion), followed by Germany ($13.4 billion), France ($12.7 billion), and China ($9.5 billion). Denmark 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, 2019 - US$112.0 billion

Leading countries (billion $):

USA	50.1
Germany	13.4
France	12.7
China	9.5
Canada	3.9

Per capita consumption of organic:

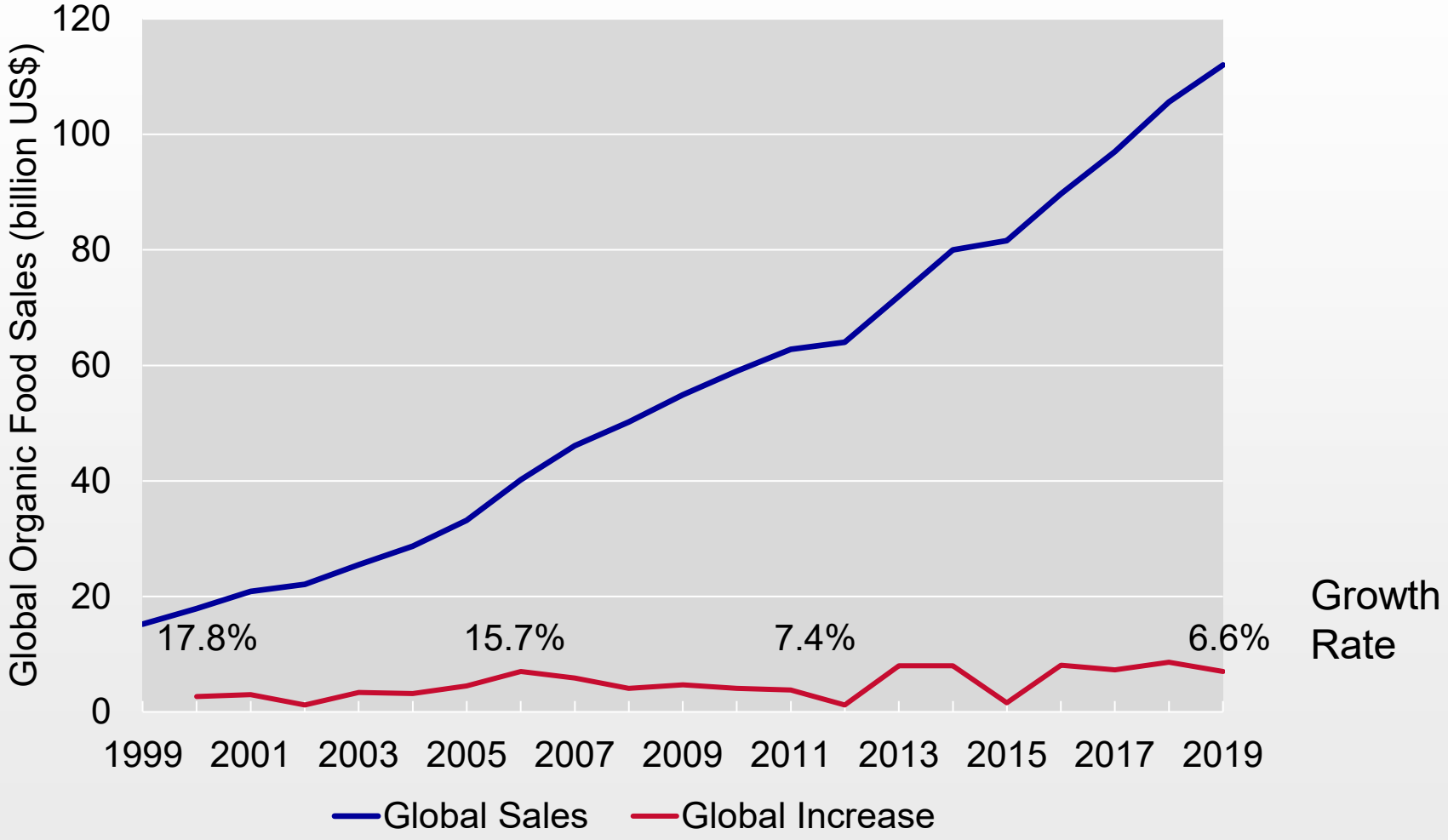
Denmark	344 €/yr (~6% of food $)
Switzerland	338 €/yr
Luxemburg	265 €/yr
U.S.	136 €/yr

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$7 billion in 2019 over the previous year.

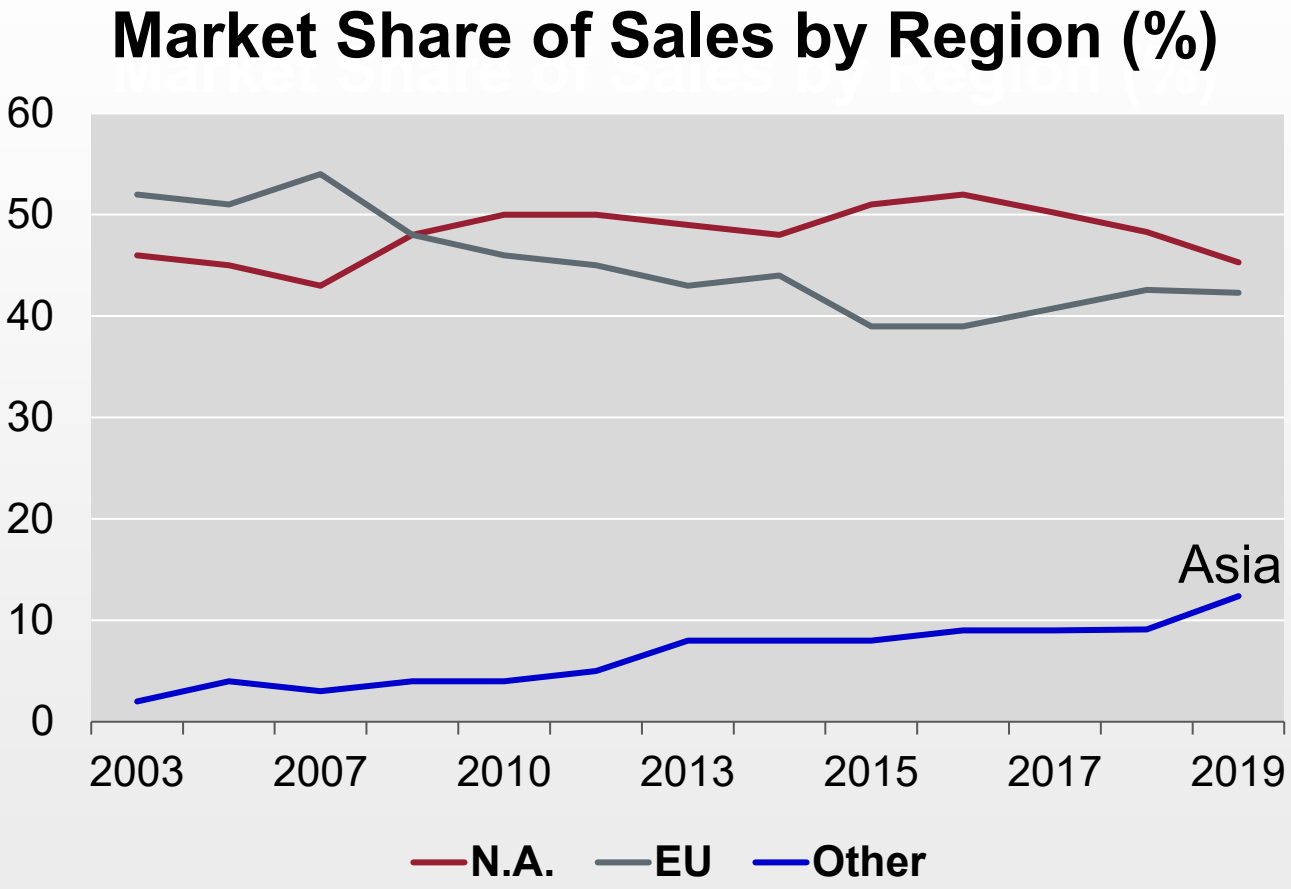
North America and Europe have accounted for over 90% of organic sales worldwide for the past decade (slide 8). The “Other” category has grown in recent years, particularly driven by expanding Asian markets. These markets are expected to continue their growth, due to increasing middle class incomes and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



Source: World of Organic Agriculture

Consumer Demand for Organic Food



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

Source: World of Organic Agriculture

In 2019, there were an estimated 178.6 million acres of agricultural land (cropland, permanent crops, permanent grassland, other) under organic management worldwide, up 3% from 2017, and equaling about 1.5% of global agricultural land. Of the organic land, 18% was in arable crops (e.g., grains, vegetables), 7% in permanent crops (e.g., tree fruit, coffee, grapes, olives), and 67% in permanent grassland. North America had 9.0 million ac of organic agricultural land, of which 36% was arable land. From 2011 to 2017, global organic arable land grew from 13.6 million ac to 32.4 million ac (+138%), and permanent crop land grew from 5.9 million ac to 11.6 million ac (+96%). 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	0.7%	Coffee	6.7%
Oilseeds	0.7%	Grapes	6.7%
Medicinals	17.4%	Berries	13.5%
Vegetables	0.7%	Temperate fruit	2.6%

Source: World of Organic Agriculture

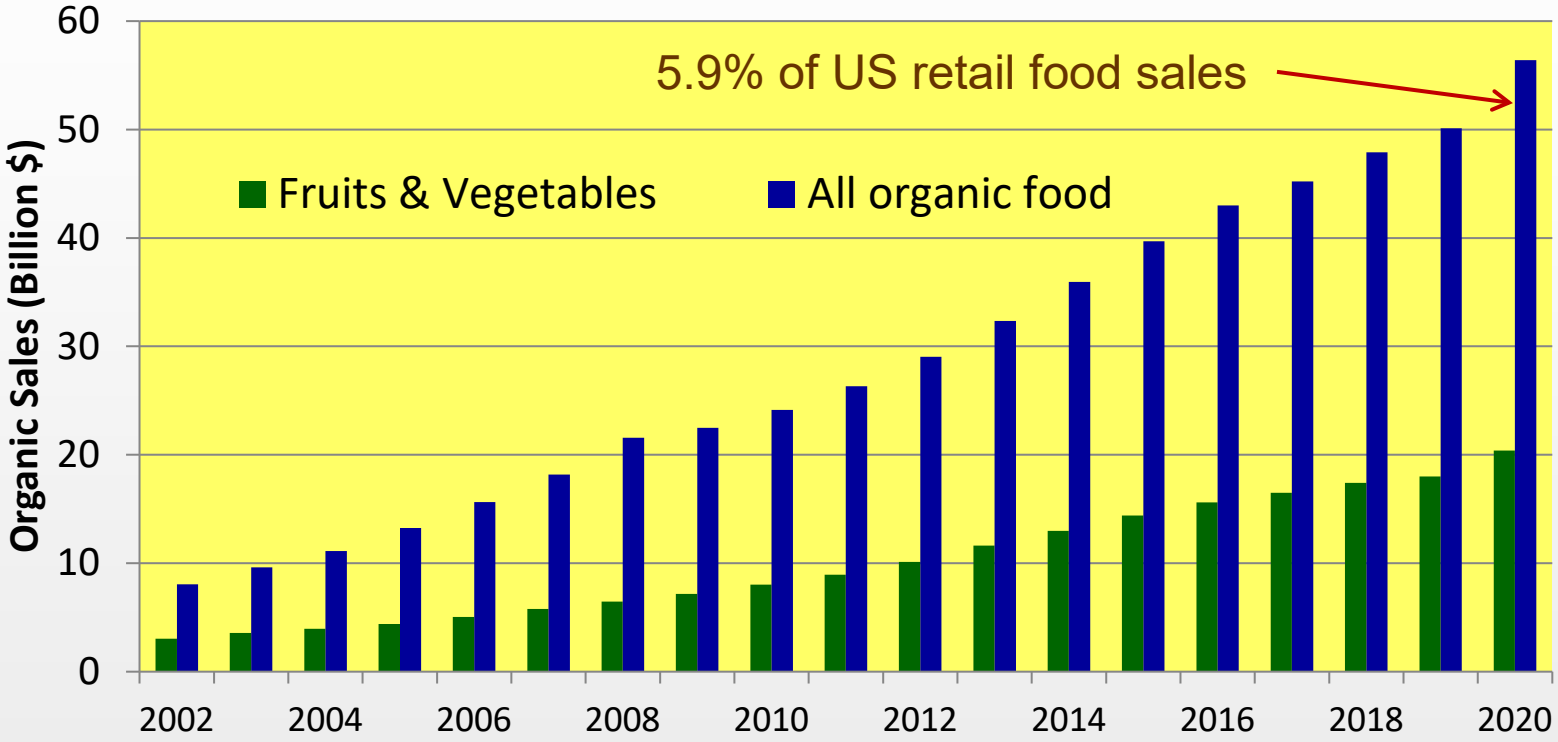
National Trends

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 increased over 12% in 2020 due to increased demand from the pandemic behavior changes, pushing organic food sales to nearly 6% of all US retail food sales.

The USDA collects data 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 National Agricultural Statistics Service (NASS) did the first ever Organic Production Survey in 2008 and repeated it in 2014, 2015, 2016 and 2019. They 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 12.8% in 2020. Organic fruits and vegetable sales increased 13.3% and were 36% of all organic food sales (and 15% of all US produce sales); over 90% were sales of fresh produce.

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.

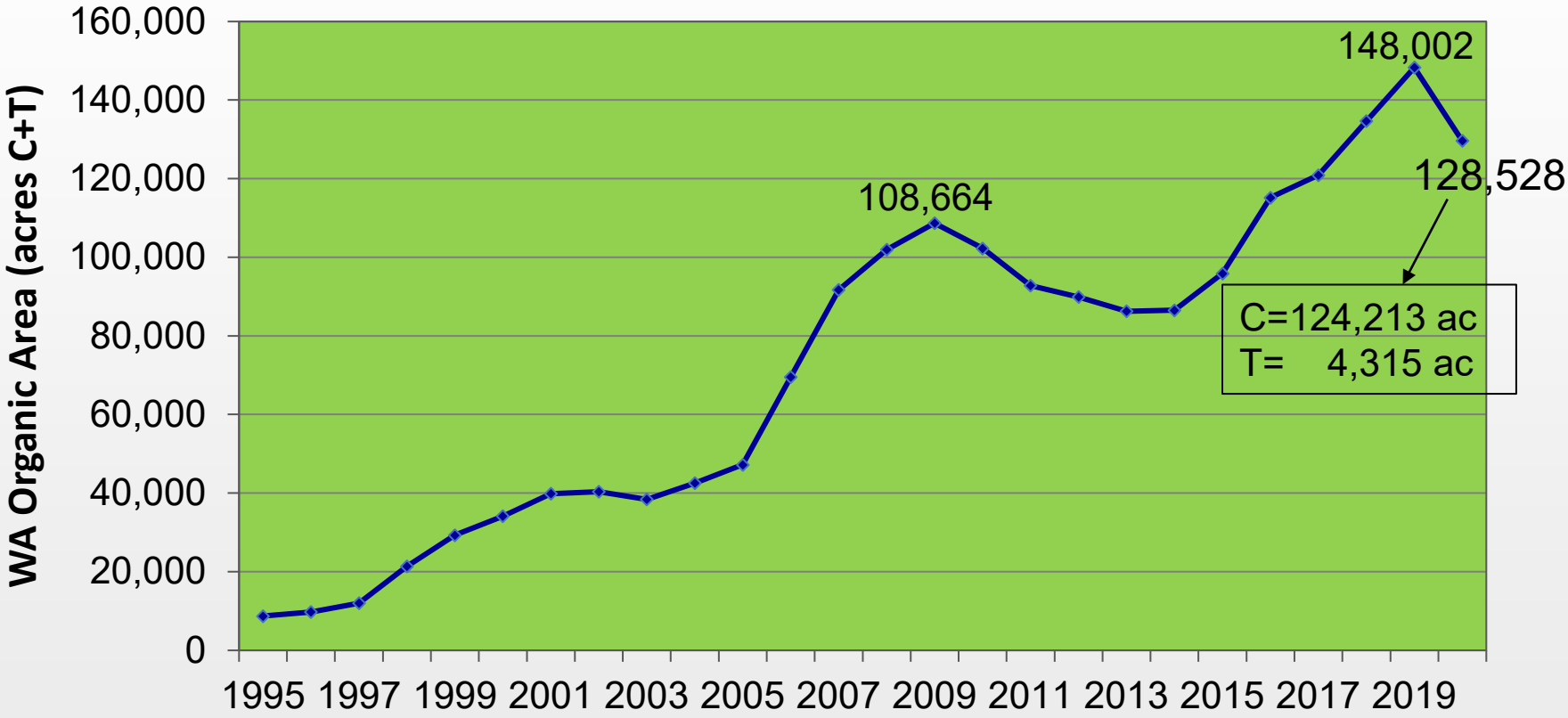
USDA NOP Organic Integrity Database. https://apps.ams.usda.gov/integrity/
Current information on certified farms and companies by state and products. No acreage data at present.

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, began climbing in 2015, and then reached a new high in 2019 at 148,000 acres. Area declined to 128,528 acres in 2020, a 12% drop. “Area” data are reported as actual site acreage certified, versus “acres” data that include doubled-cropped land and do not include uncropped portions of a site (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.

Forages, Vegetables, and Tree Fruit have been the leading crop categories in terms of acres for many years, and Tree Fruit claimed the top spot at 32% of land in 2020. Grains etc acreage shrunk by 46%,Vegetables were down 16%, while Small Fruits etc were up over 19% mostly due to continued blueberry expansion (slide 16). Changes in the acreage of these different categories over time are displayed in slide 17.

Washington Organic Farm Area



C+T=Certified (includes Pending) + Transition; includes all site area but no double crop 2005-2020. WSDA only 1995-2003; additional data added from other certifiers beginning in 2004.

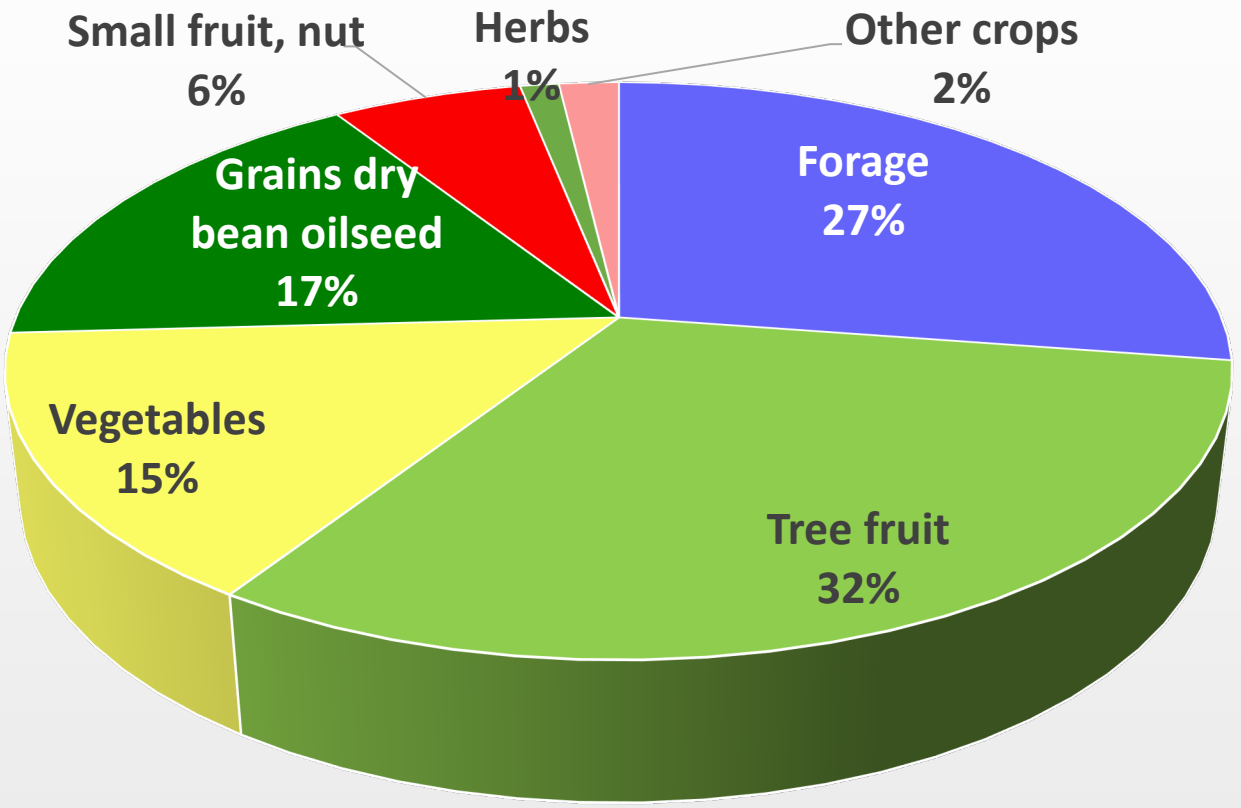
Certified Organic Crop Acres
Washington State

	Acres			% Chg 19-20	% of total
	C 2019	C 2020	T 2020		
Forage	34,425	33,637	1,456	-2.3	-27.4
Vegetable	21,968	18,391	10	-16.3	15.0
Tree Fruit	41,580	39,021	1,335	-6.2	31.8
Grains/Dry Beans/Oilseeds	38,489	20,611	380	-46.5	16.8
Small Fruit, Grapes, Nuts	6,133	7,341	968	19.7	6.0
Herbs	1,369	1,499	1	9.5	1.2
Other crops and land	2,512	2,316	26	-7.8	1.9
Undefined land	0	0	--	--	--
Total acres (with double crop)	146,476	122,816	4,176	-16.2	--
Total area (site acres)	142,670	124,213	4,315	-12.9	--

C=certified; T=transition; % Chg is change in certified acres from 2019 to 2020; % of total is for 2020 certified acres. 2020 combined certifier data includes an estimated 1,693 ac of double crop; 2019 data include estimated 1,416 ac double crop;

Distribution of Certified Organic Acres

Washington 2020



Certified crop acres*: 122,816

*includes 1,693 ac double crop

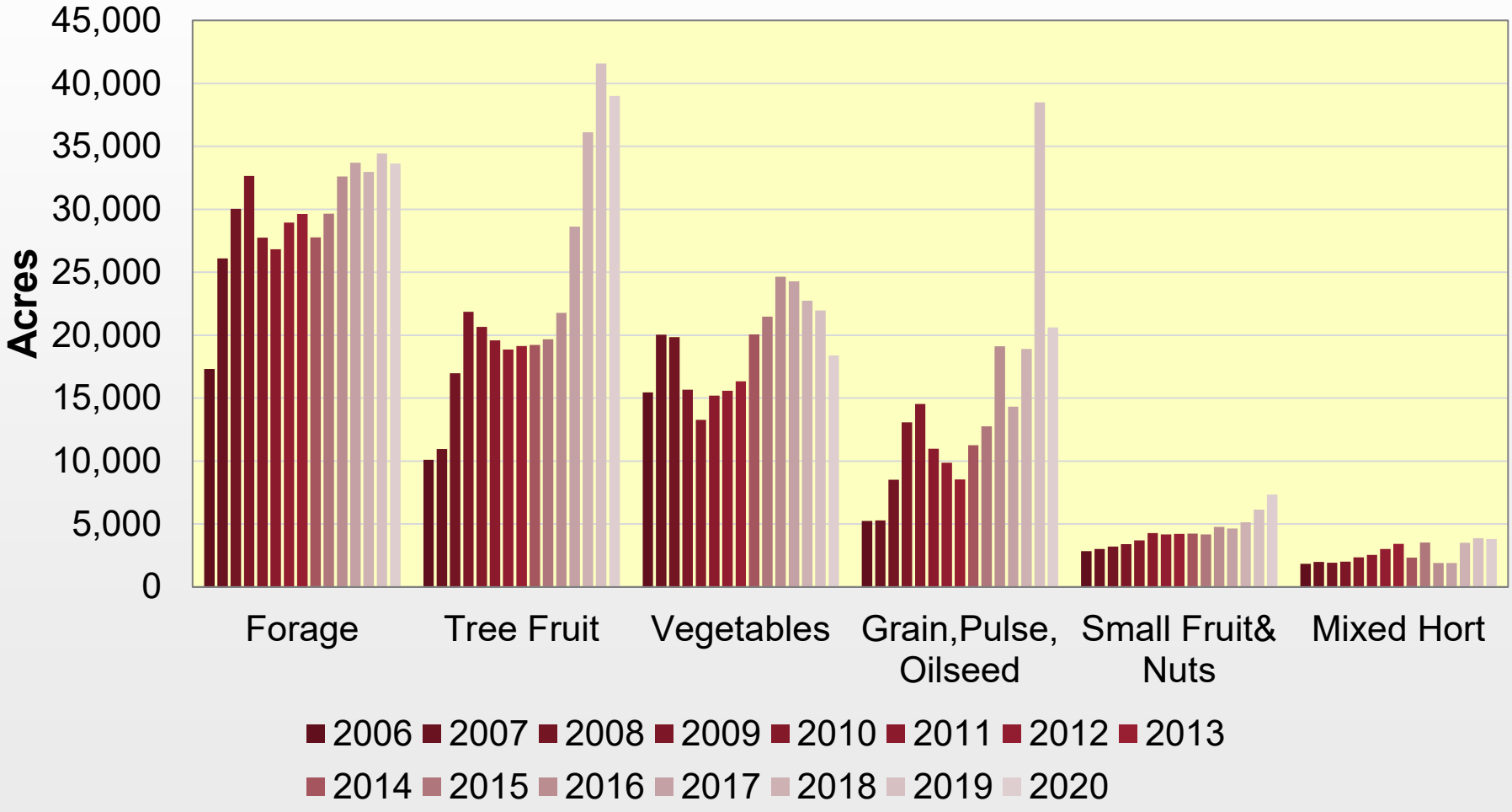
Transition crop acres: 4,176

Total certified site area = **124,213 ac** (e.g. includes undefined land not tracked as crop)

Combined certifier data

Distribution of Certified Organic Acres

Washington State

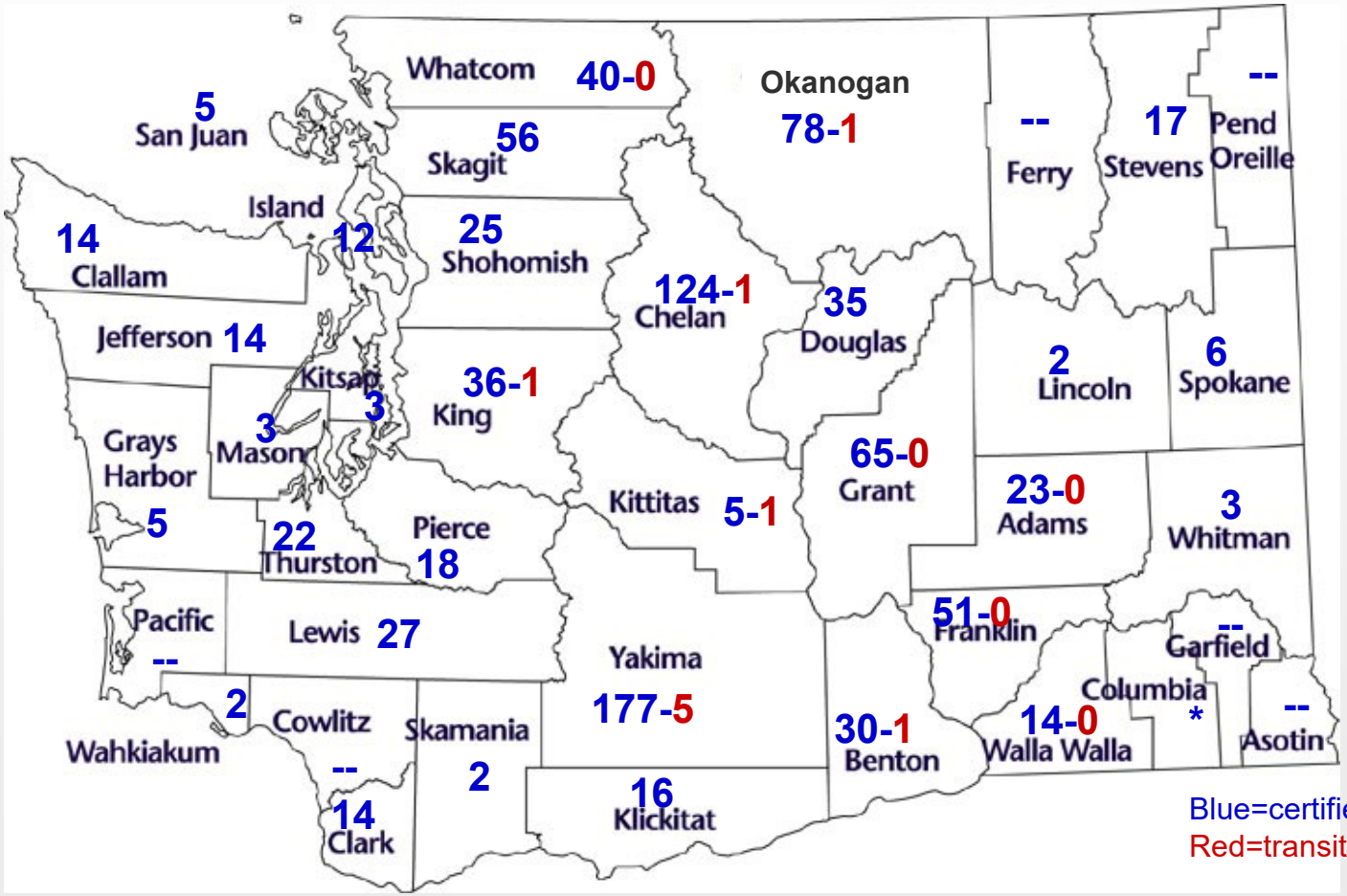


Combined certifier data; double crop acres included

The spatial distribution of organic farms in Washington by county is shown by farm number (slide 19) and area (slide 20). Five counties showed no certified farms in 2020. Grant County had the highest number of certified acres, while Yakima had the highest number of certified farms. Statewide, 944 farms were certified organic in 2020, with another 10 farms registered as transition only, for which acreage detail is available. Another 18 were certified but with no details available. Eastern WA counties had 68% of the certified farms by number and 77% 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 they 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 2019 and declined in 2020. There is 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 2020 was on existing certified farms in eastern WA. (slide 23)

2020 Number of Certified Farms by County



Farms

944 certified

10 transition only

Eastern WA

68% of farms

Western WA

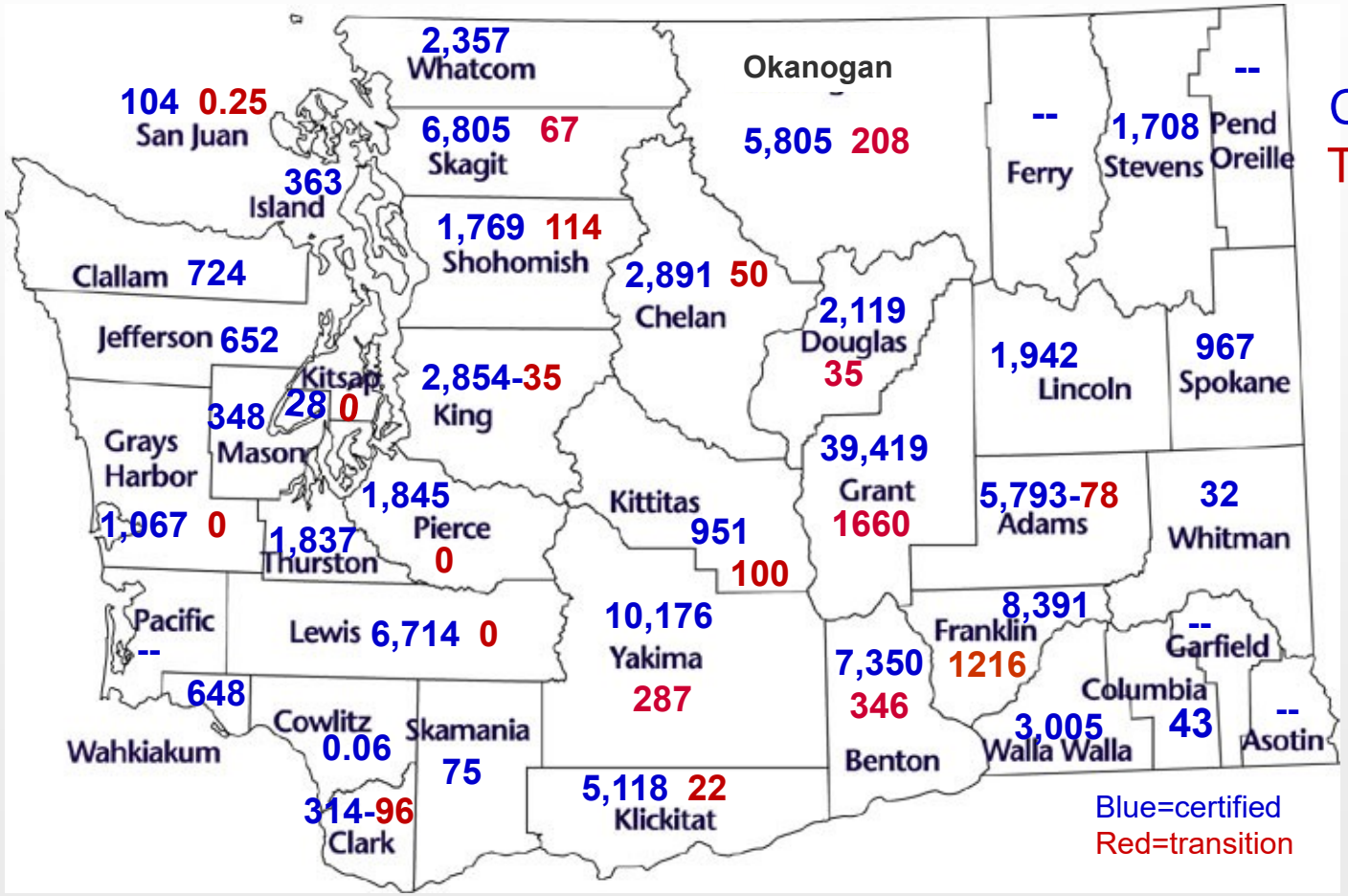
32% of farms

Blue=certified producers (primary county)

Red=transition only producers

*WSDA, OTCO, CCOF data only. T only value may include a few farms pending certification. Data do not include 18 farms with other certifiers that show in the USDA database for 2020, primarily one poultry company with multiple farms in W WA. *1 farm in Columbia Co, but business address is in another.*

2020 Certified Farm Area by County (acres)



Area*
Cert 124,213 ac
Trans 4,315 ac

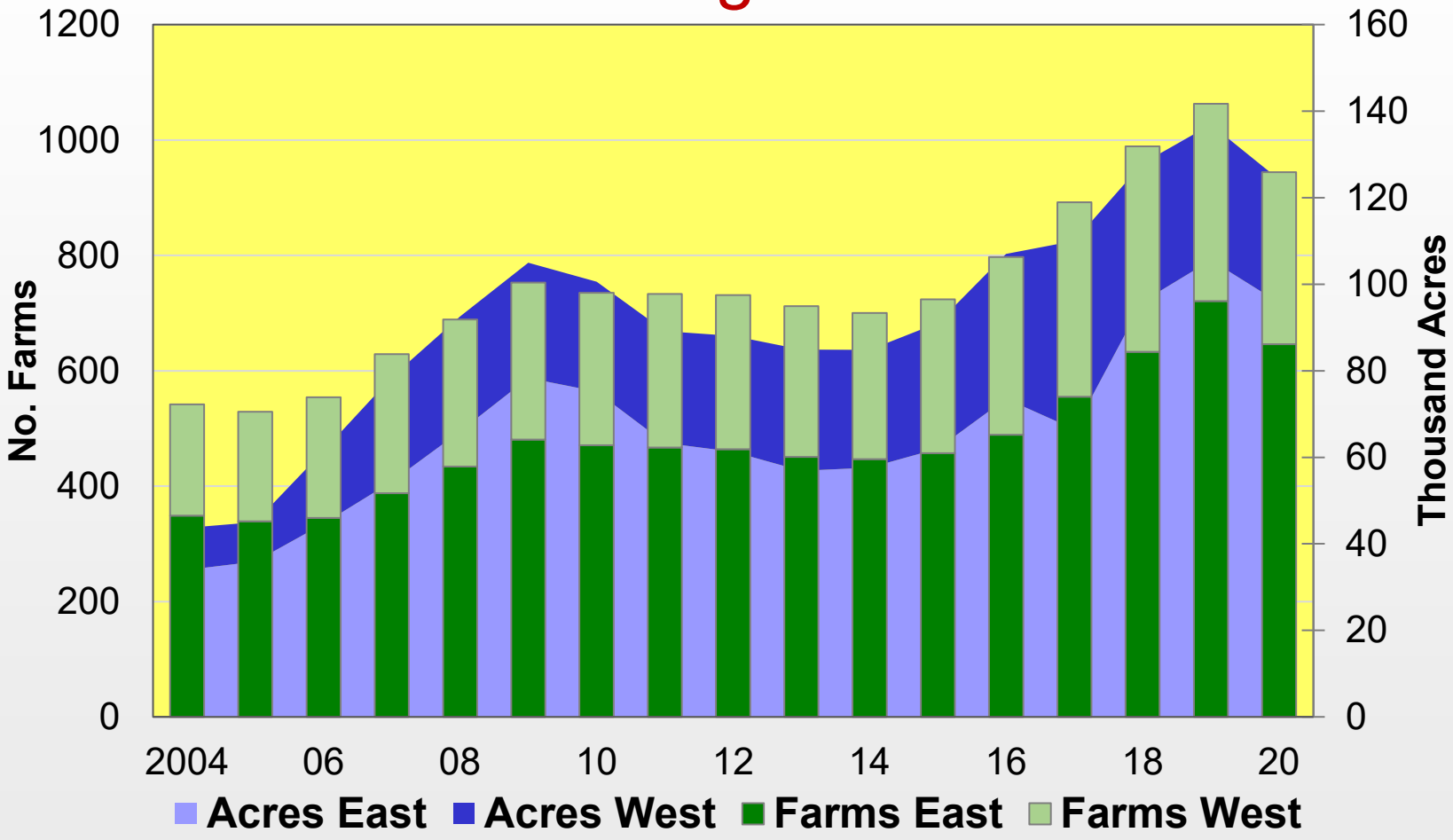
Eastern WA
77%
of certified ac

Western WA
23%
of certified ac

*WSDA, OTCO, CCOF 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 WSDA, OTCO, CCOF. An additional 18 farms certified by other certifiers not included in data as no details available. Site area does not include double crop acres. Farm number includes both livestock and crop producers and is based on business address.

Organic Farm Site Area
Washington State

	2009	2012	2015	2017	2018	2019	2020
Site area	Acres						
Certified	104,962	88,072	91,088	110,043	127,960	142,670	124,213
Transition	3,703	1,817	4,800	10,848	6,693	5,610	4,315
No. of producers[a]	753-10	731-3	724-22	892-29	989-30	1062-28	944-10

[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 2020

	East	West	Total
# farms with Transition acres	49	9	58
# farms T only	9	1	10
% that are T only	18	10	27.5
% T only farms by region	90	10	--
All T acres	4,004	311	4,315
% by region	93	7	--
T ac on C farms			3,515
T ac on C as % all T ac			81

Majority of Transition (T) is happening on previously Certified farms who are expanding, and in eastern WA. Transition acres decreased 23% from 2019 (1,295 ac), the second year in a row of decrease.

Combined certifier data

The following group of slides shows more detail on several of the major crop categories. In 2020, organic tree fruit (slide 25) accounted for 32% of total organic crop acreage, but for over 50% of farmgate sales, given its high value per acre. Organic apple acreage declined 6% from the previous year and transition acres were less than half. Pear and cherry acreage changed little. Few acres were in transition compared to recent years (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 was down again from the previous high in 2017. The biggest change in 2020 was the reduction to near zero for green beans. Sweet corn and green peas, which are often double-cropped, still have the largest area. These two organic crops are estimated to account for 7% and 10%, respectively, of all acres of those crops grown in the state.

Organic Tree Fruit Acres
Washington State

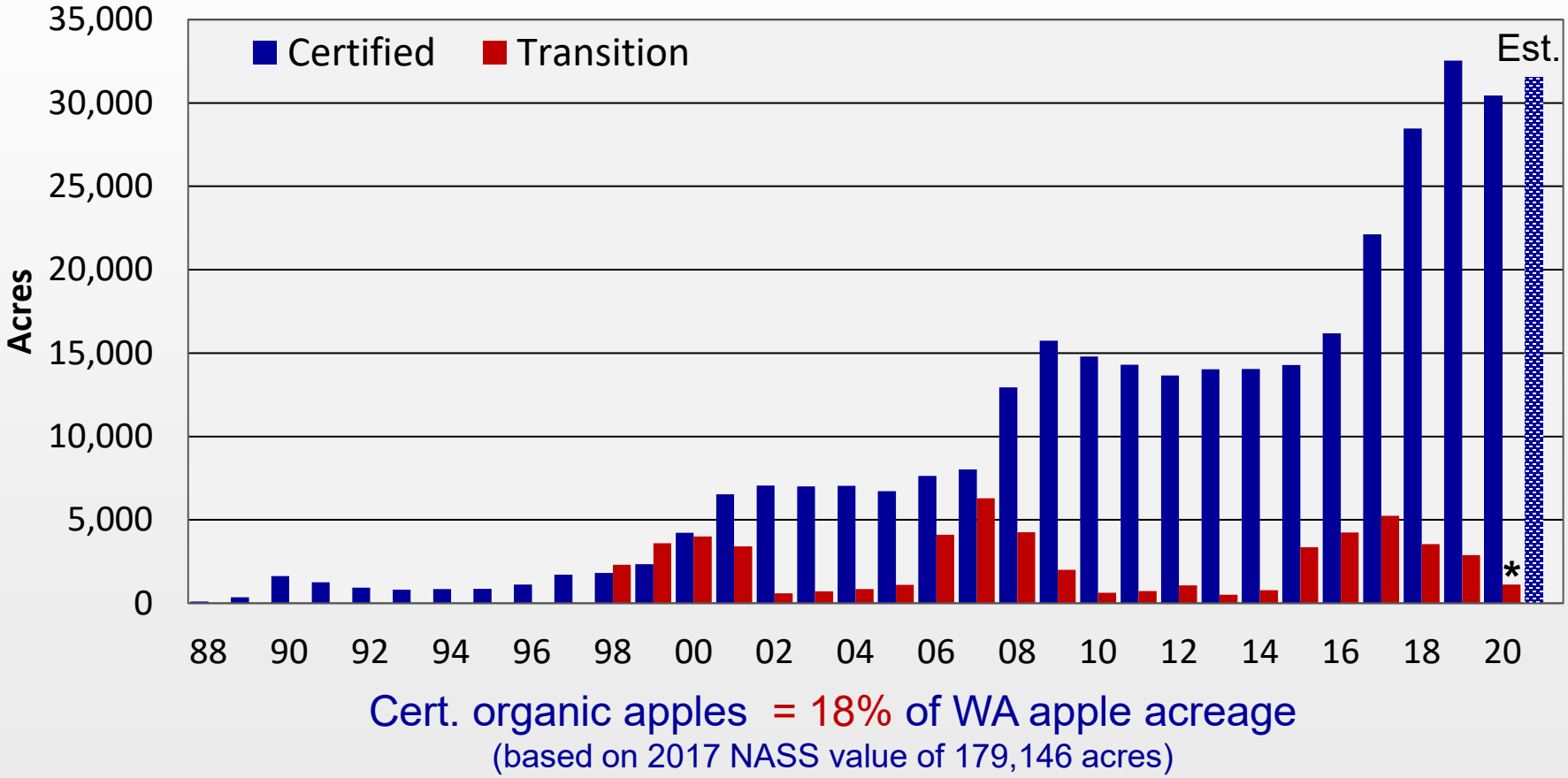
	--- Certified acres ---								Trans acres†
	2010	2012	2014	2016	2017	2018	2019	2020	2020
Apple	14,790	13,657	14,052	16,191	22,116	28,473	32,537	30,424	1,122
Pear	2,033	1,900	1,843	2,243	2,763	3,263	4,201	4,256	128
Cherry	2,147	1,792	1,939	2,078	2,546	3,014	3,352	3,180	75
Apricot*	299	266	299	251	216	271	360	268	9
Nectarine	550	488	440	379	357	470	472	318	0
Peach	701	618	580	553	580	580	602	469	0
Plum/Prune*	125	89	58	76	45	49	53	106	1
Mixed stone	13	45	17	--	1	4	2	0	0
Total*	20,658	18,855	19,228	21,771	28,624	36,122	41,580	39,021	1,335

*apricot includes aprium; plum includes prune, pluot and plumcot; totals do not include mixed tree fruit;
†only those acres registered with a certifier

Organic tree fruit accounted for about 14% of all tree fruit acres in Washington State in 2018.

Combined certifier data

Organic Apple Acreage
Washington State

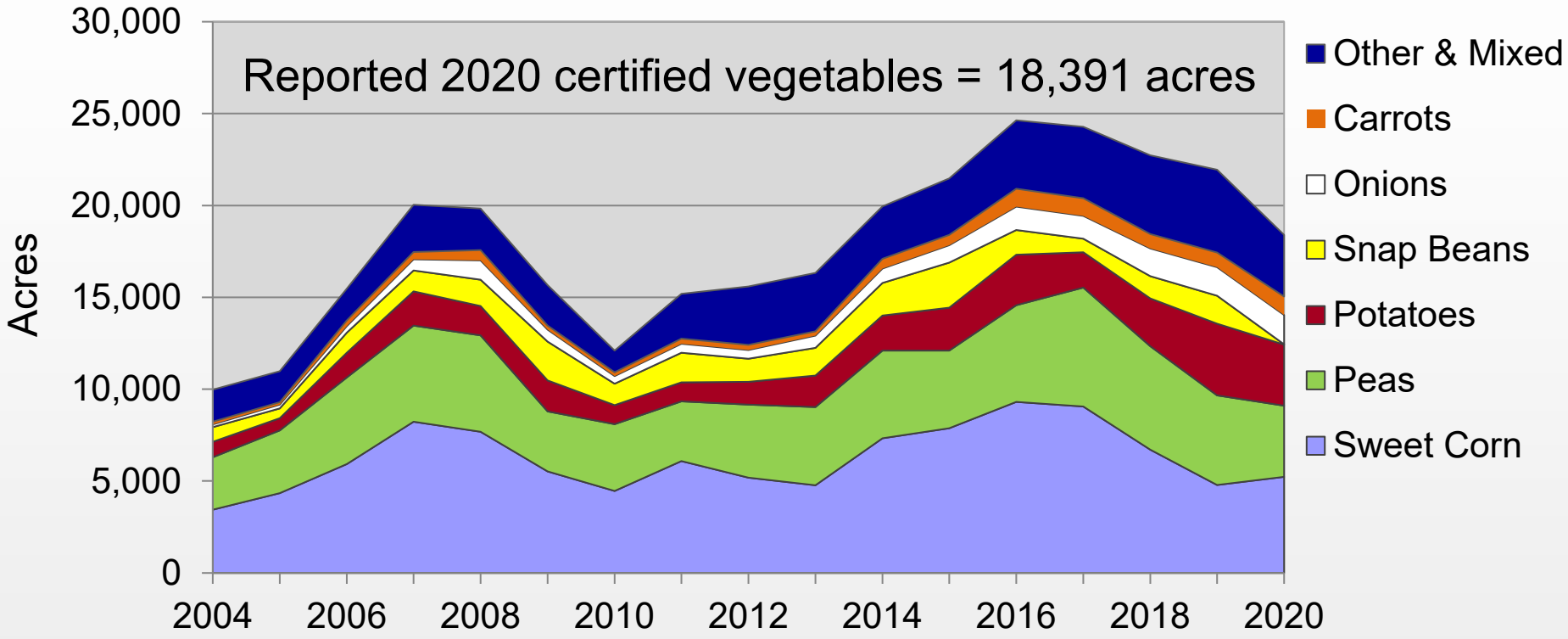


Cert. organic apples = 18% of WA apple acreage
(based on 2017 NASS value of 179,146 acres)

*Transition acres from WSDA only

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 6.8%;
Peas 10.5%; Onion 8.1%

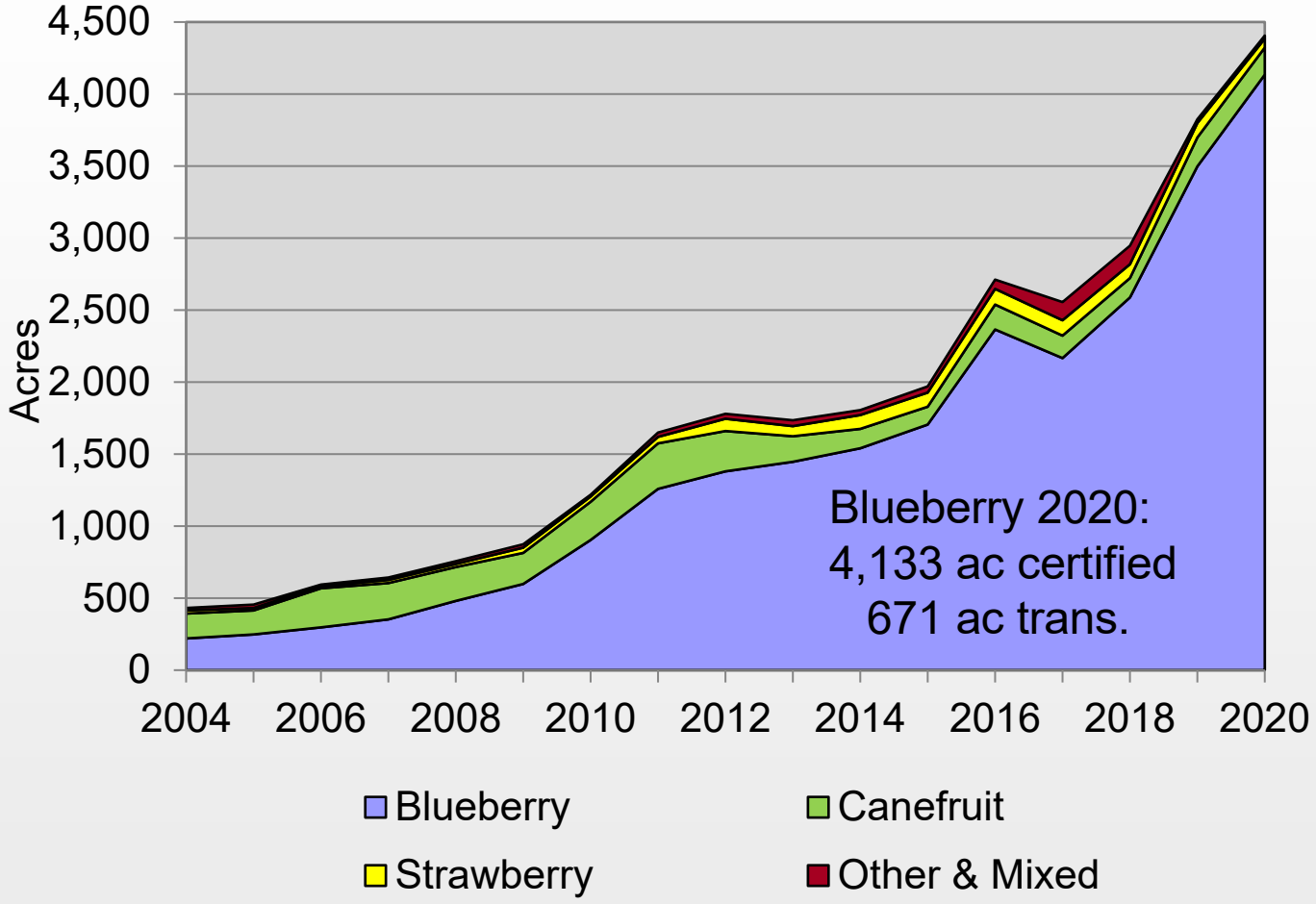
Organic acreage share is the % of all state acres of the crop that are certified organic

Combined certifier data

Blueberries account for the largest share of organic berries in the state (slide 30). Blueberries in general have experienced tremendous growth (up 18% in 2020, with 671 ac in transition), 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 then leveled off. Organic wine grape acres declined 15% in 2020. 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.

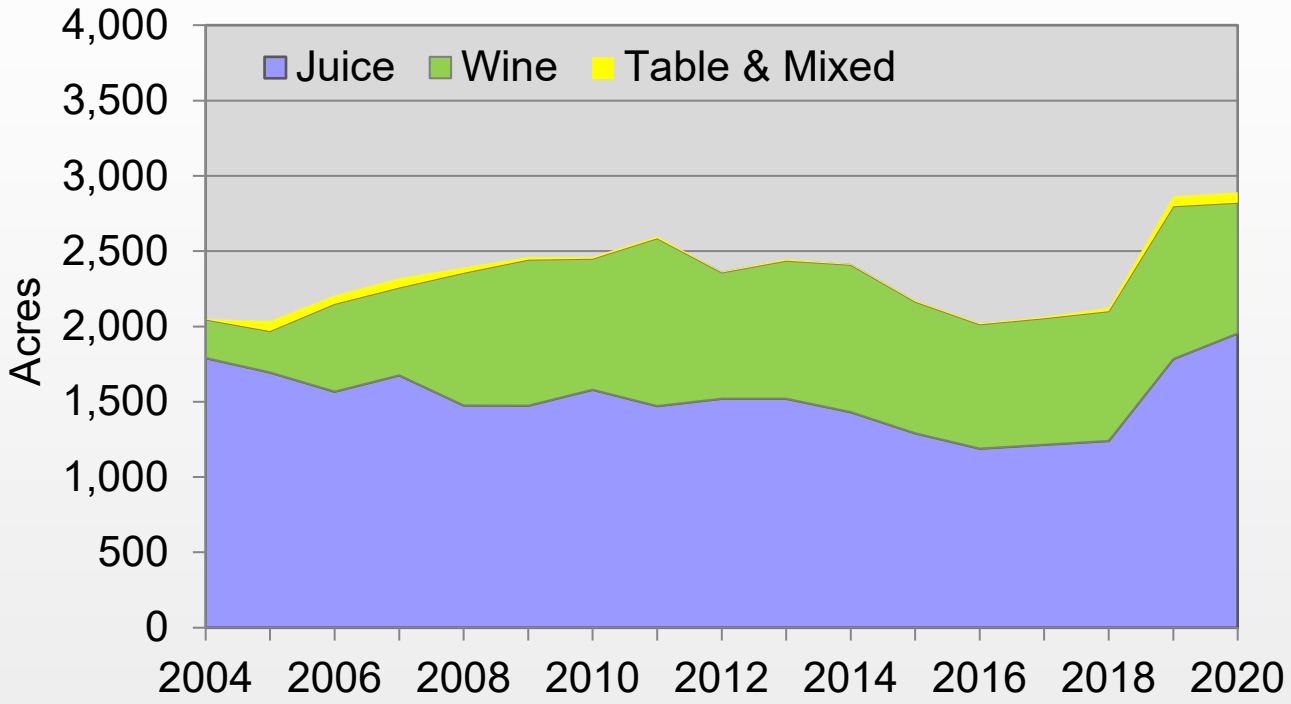
Washington Organic Berry Acres



Organic is ~23% of total WA blueberry acreage (using 18,200 harvested ac state total from NASS 2020).

Combined certifier data

Washington Organic Grape Acres



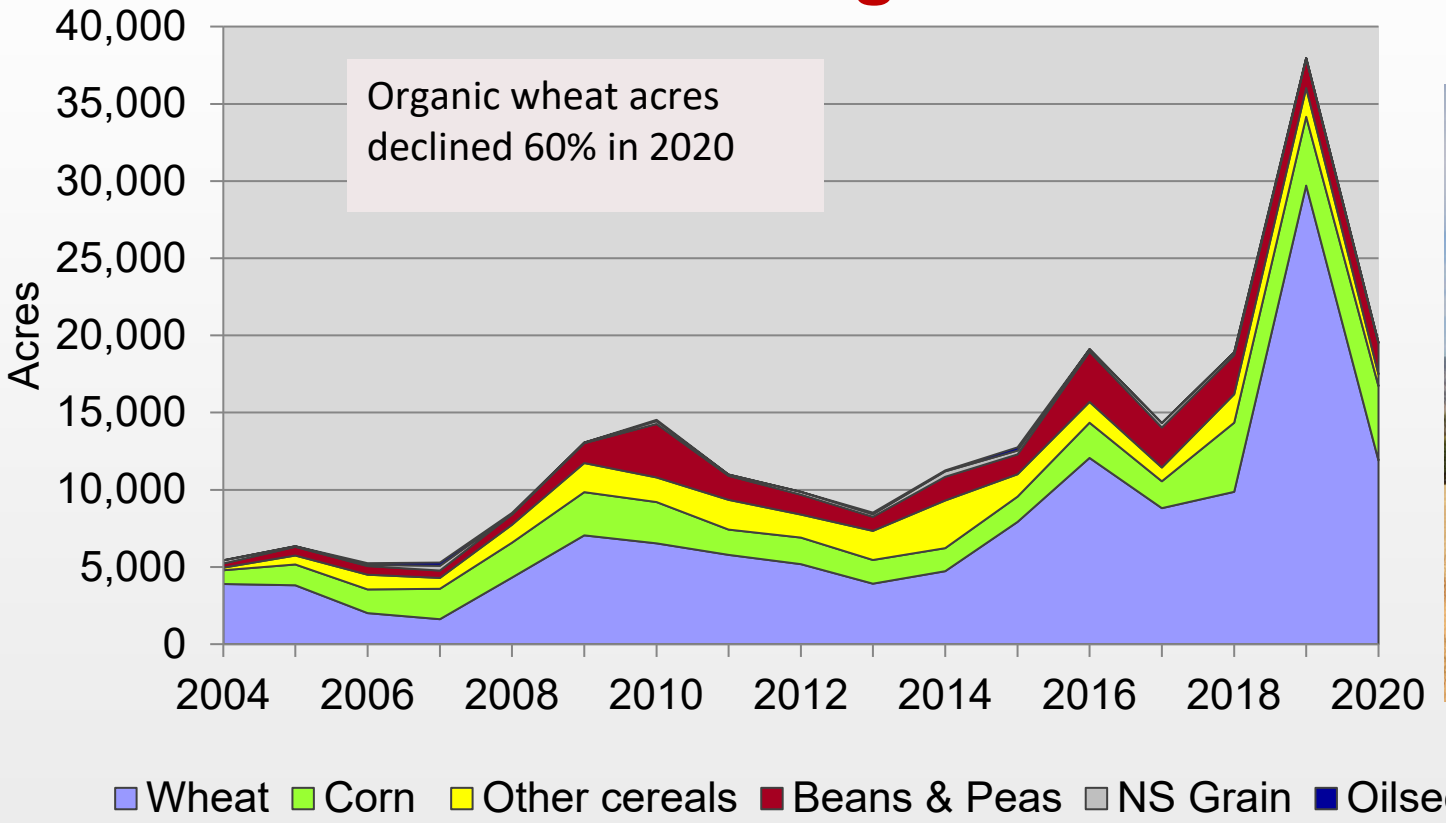
Reported 2020 total certified grapes = 2,891 acres
(Concord = 68%)
Estimated organic share of WA grape acreage = 10% of juice and 1% of wine grapes

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 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 has expanded and leveled off. The forage area showed a small decrease for 2020.

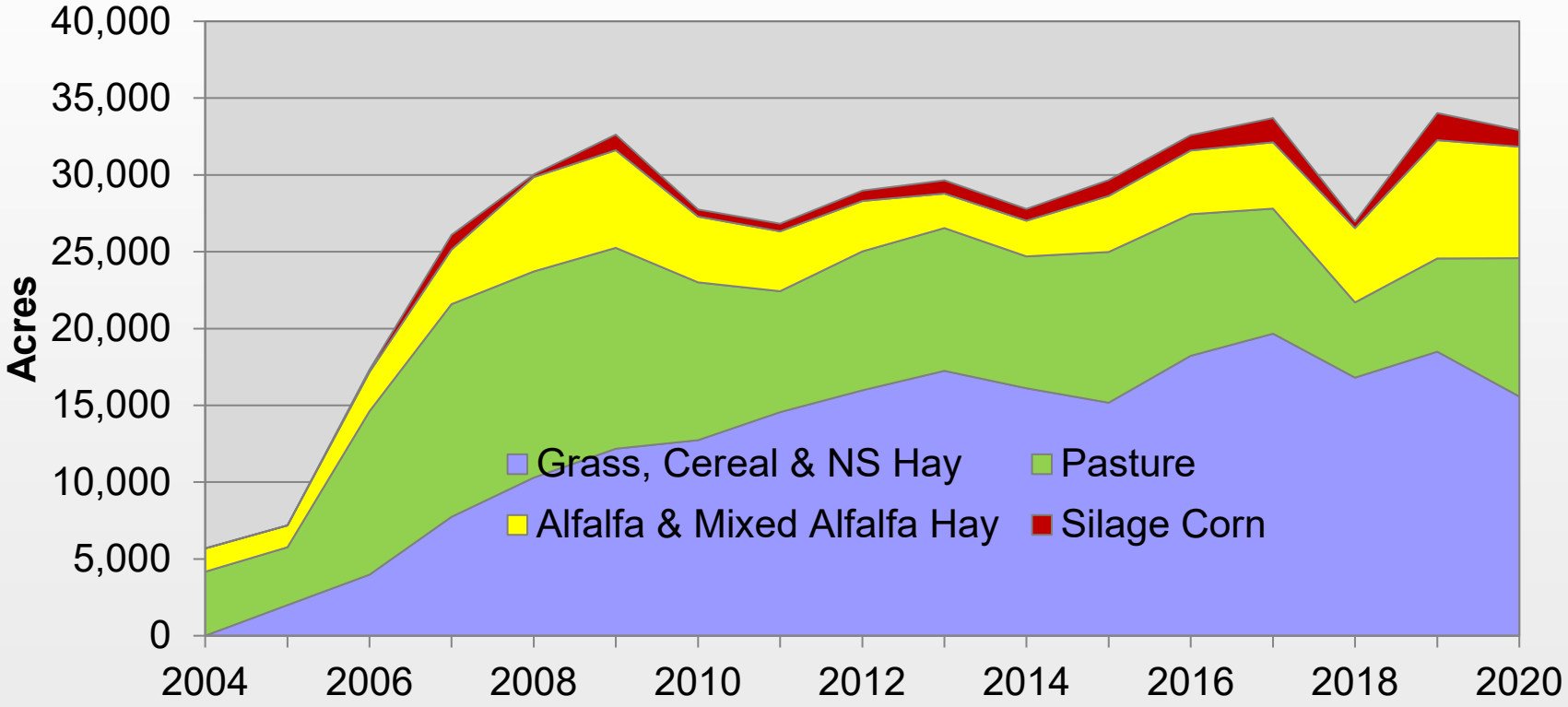
Organic Grain, Pulse & Oilseed Acres
Washington State



Reported 2020 organic grain, pulse and oilseed = 20,611 acres

Combined certifier data

Organic Forage Acres
Washington State



Reported 2020 WA organic forage total = 33,637 ac; much of the hay ground is also cut as silage, haylage or greenchop, or grazed as 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 3.5% of the state dairy herd in 2019.

There were 45 certified cow dairies in 2019, and 1 certified goat dairy. The number of dairy cows rose slightly from 2016. Statewide organic milk production rose an estimated 6% from 2016 to 2019, while the total value of organic milk (farmgate) decreased 11% due to apparent prices dropping from an average of $34.13/cwt in 2016 to $28.66/cwt in 2019.

Estimated Organic Dairy Cows

Washington State

	- - - - - - - - -Number Certified - - - - - - - - -							
	2006*	**2008**	**2010**	**2014**	**2016**	**2017**	**2018**	**2019**
Milkers & dry	2,970	9,022	5,898	7,505	9,012	9,707	9,323	9,657
Calves & Replacements	2,180	7,022	4,154	5,514	6,033	6,469	7,121	n.a.
Total	5,150	16,044	10,052	13,091	15,045	16,176	16,445	n.a.
No. organic dairies	23	46	34	38	45	50	50	45

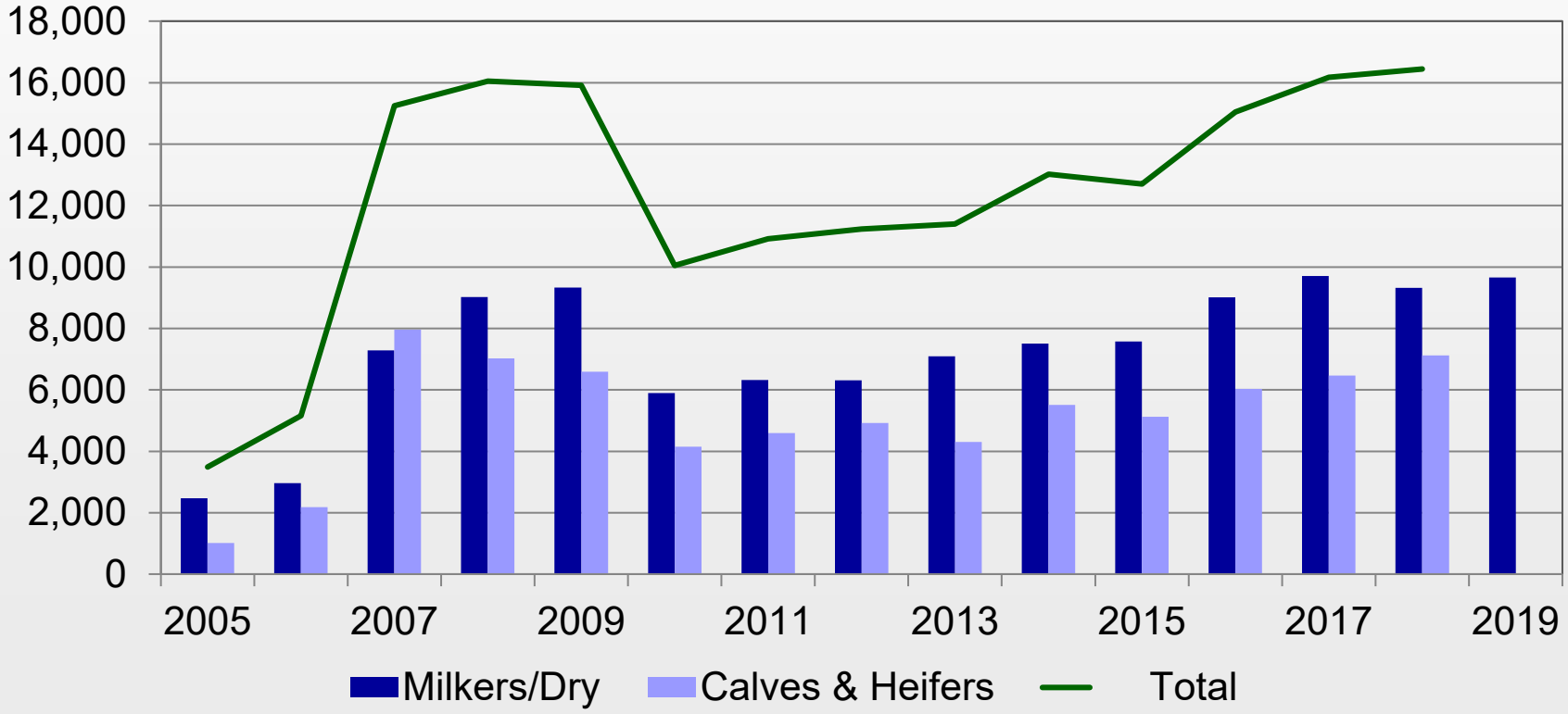
There was also 1 certified organic goat dairy in 2019

Organic dairy cows represented 3.7% (2008) and 3.5% (2019) of state milk herd**

*Combined certifier data, WSDA and OTCO. *An additional 5,112 milkers had "pending" status in 2006. ** Milkers only; based on NASS (WA) 2018 statistics.*

Organic Dairy Cow Numbers

Washington State



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, 2019) did gather livestock data, and these are compared for WA in slide 39. The value of livestock and livestock product sales were 25%, 16%, and 19% of total organic sales in the state in 2015, 2016, and 2019, respectively. This is lower than the U.S. average of 42-44%.

Washington was #9 in organic milk production, and #5 in organic eggs in 2019 (slide 40). Organic egg production in the state doubled from 2016 to 2019. There are also large organic broiler producers in the state; WA ranked #4 for organic broilers sold in 2019. 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. increased from 2016 to 2019 (layers +14%; broilers +54%). US organic hogs and pigs inventory dropped 3% and sheep and lambs dropped 14%, while cattle rose by 21%.

WA Organic Livestock

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

	WA			US		
	2015	2016	2019	2015	2016	2019
Livestock sales	6%	6%	9%	12%	15%	17%
Livestock product sales	19%	10%	10%	31%	29%	25%

2019 WA	# inventory	# sold	Sales $
Milk cows	9,657	2,403	2.25 Mil
Beef cows	584	43	68 K
Other cattle, calves	7,736	6,836	4.42 Mil
Layers	1,025,900	*(nd)	83 K
Broilers	2,108,276	10.1 Mil	68.6 Mil

*nd: not disclosed

Sources: USDA NASS 2015, 2016, 2019 Certified Organic Surveys

WA Organic Livestock

	2016	2019
Livestock and poultry sales	$37.4 mil	$76.5 mil
Livestock and poultry product sales	$65.5 mil	$92.2 mil
U.S. rank	8	9
% of U.S. sales	3%	4%
Organic milk production	128.7 mil lb	136.9 mil lb
Organic milk sales	$43.9 mil	$39.2 mil
U.S. rank	8	11
% of U.S. sales	3%	3%
Organic egg sales	$21.5 mil	$52.9 mil
U.S. rank	10	5
% of U.S. sales	3%	6%

WA organic eggs (dozen): 2008 – 4.6 mil; 2016 – 8.9 mil; 2019 – 18.2 mil

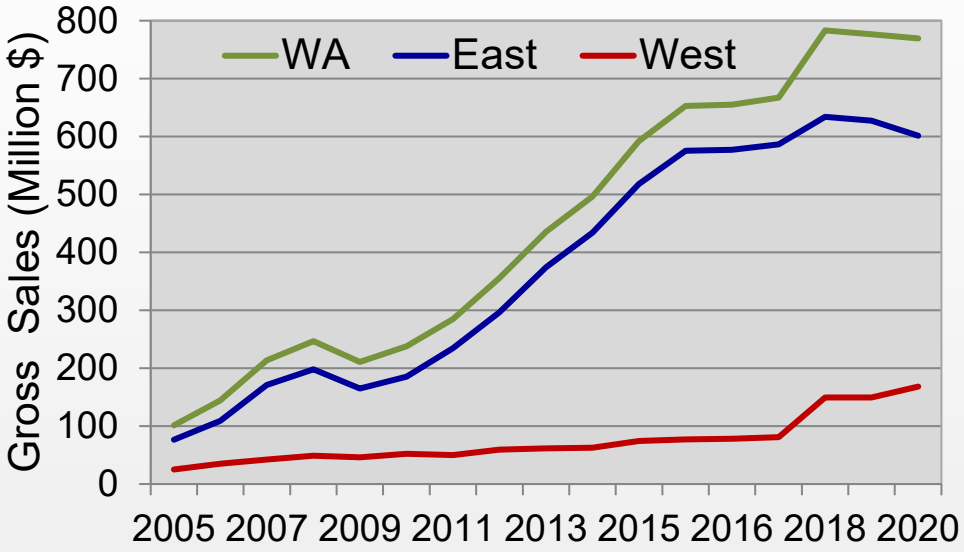
Source: NASS 2016, 2019 Certified Organic Surveys

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 78% of farmgate sales coming from 77% of certified acres (slide 42). Total sales declined by 0.8% in 2020, likely due to lower organic apple prices. Leading organic sales were Grant County ($226 million) in eastern Washington and Pierce County ($38 million) and Mason County (not disclosed) in western Washington (slides 43 and 44). Not included in these totals are sales for a number of broiler farms, some mushroom production, the value of wine grapes that are only reported as finished wine, and several dairies who report through their cooperative. Seven counties experienced sales declines of greater than 10%, while sales grew more than 10% in 13 counties. About 88% of farm sales came from crop production versus 12% from livestock.

The distribution of organic sales (WSDA-certified only) by farm economic class shows that 35% of farms have annual sales less than $100,000 in 2020, and in aggregate, these farms account for only 1.5% of all organic sales in the state (slide 45). Farms with more than $1 million in sales (24% of farms) accounted for 77% of organic sales in 2020 (slide 46).

Trend of Farmgate Sales Value

Cert. Organic Crop and Animal Products Washington State Producers



	--------2020--------			
	Million $	% +/- 2019-20	% of $	% of acres
East	601	-4	78	77
West	168	+13	22	23
Total	769	-1	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.

2020 Farmgate Sales

Certified organic crop & animal products

Eastern WA county estimates

	$ Million
Grant	226.6 ↓
Yakima	82.0 ↑
Benton	67.4 ↑
Adams	39.9 ↓
Okanogan	35.6 ↓
Walla Walla	28.3 ↓
Franklin	60.6 ↑
Chelan	33.5 ↑
Douglas	12.5 ↓

	$ Million
Klickitat	12.6 ↑
Stevens	1.1 ↑
Whitman	<0.1 ↑
Spokane	<0.1 ↓
Columbia, Kittitas, Lincoln & Whitman 2018 sales not disclosed to protect confidentiality.	

$601 MIL total East

78% of state sales

$769 MIL total WA

Arrow indicates direction of sales change from previous year

Kittitas Co. up 72% compared to 2019

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

2020 Farmgate Sales

Certified organic crop & animal products

Western WA county estimates

	$ Million
Pierce	38.7 ↑
Skagit*	24.4 ↑
Snohomish	14.1 ↑
King	8.4 ↓
Thurston*	11.7 ↑
Whatcom*	7.8
Lewis	10.1 ↑
Clark	2.3 ↓
Jefferson	2.6 ↑
Clallam	1.1 ↓

	$ Million
Kitsap	0.4
Island	1.4 ↑
Greys Harbor	1.3 ↓
Mason, San Juan, Skamania & Wahkiakum not disclosed, to protect confidentiality.	

$168 MIL total West
22% of state sales
$769 MIL total WA

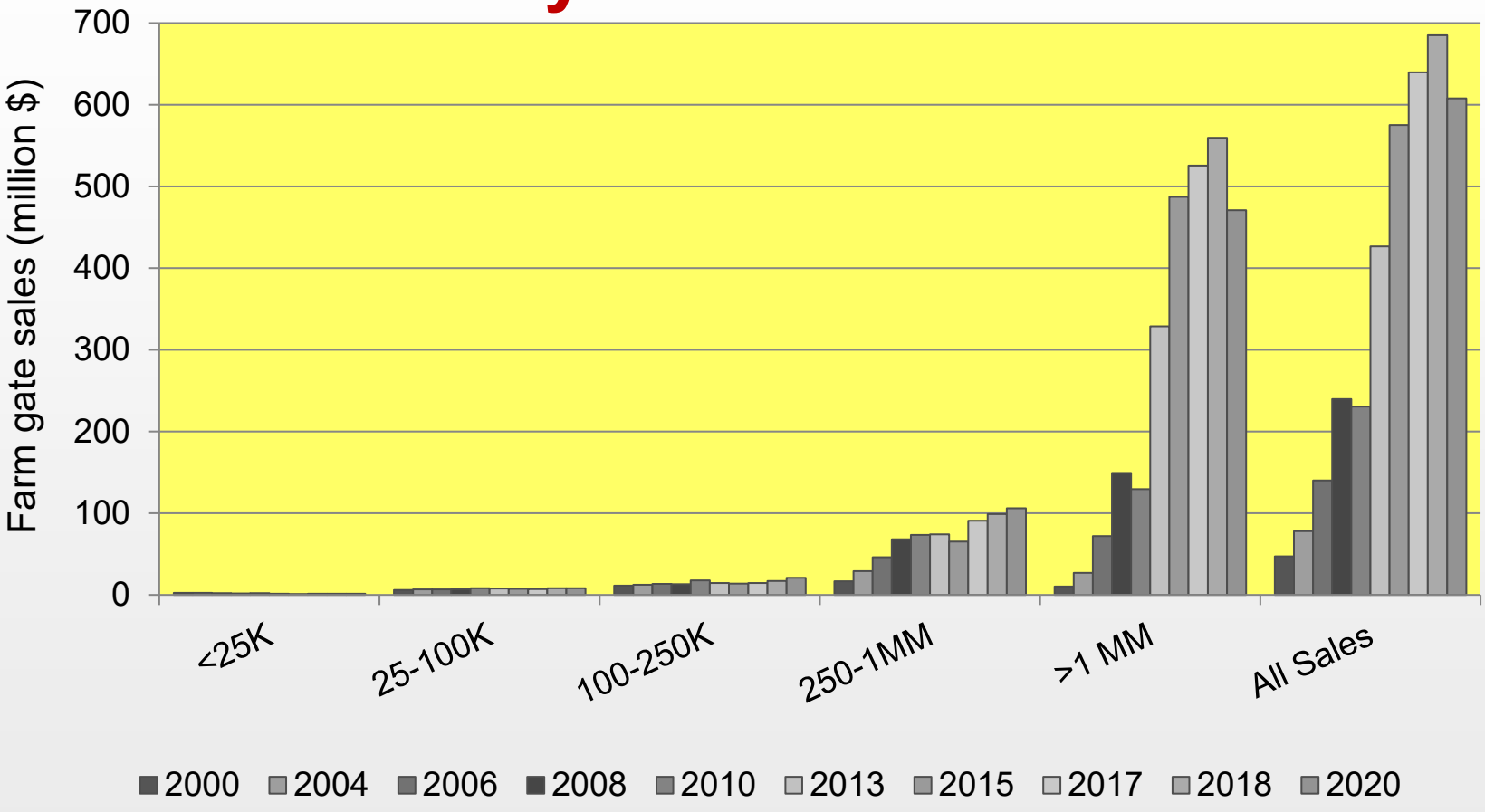
*Significant egg, broiler, and mushroom production sales value not available or not disclosed for these counties, totaling >$10 mil. WSDA & OTCO data. County sales are estimates (sales reported for county may include sales from sites in other counties).

Organic Farm Economic Class (by Sales) Washington*

Annual Gross Sales Class	% of Farms				% of Sales			
	2006	2010	2015	2020	2006	2010	2015	2020
<25K $	38	31	21	16	1	1	0.2	0.2
25-100K $	24	22	21	19	5	3	1	1.3
100-250K $	15	17	14	18	10	8	2	3.5
250K-1MM $	17	21	21	28	33	32	11	17.5
>1MM $	6	9	24	19	51	56	85	77.5

***WSDA certified farms only.** Gross farmgate sales in dollars. 718 farms reported sales for 2020. Sales do not include values from new applicants and farms that did not reapply during reporting year. Producer_processors not included.*

Distribution of WA Organic Farmgate Sales by Sales Class*



***WSDA farms only.** Gross farmgate sales in dollars. 718 farms reported sales in 2020. Sales do not include values from new applicants or farms that did not reapply during reporting year. Producer-processors not included.

Estimated Certified Organic Share of Washington Agriculture

No. Farms (2020 base data, 35,500 farms)	2.7%
Cropland (2019 base data)	1.7%
Value (NASS 2020 data, at least $8.702 billion)	8.6%


Alvarez Farm produce: C. Donovan

If organic ag was considered a single commodity, it would rank no. **6** among all Washington commodities for dollar value in 2020 (after apples, milk, cattle, wheat, and potatoes).

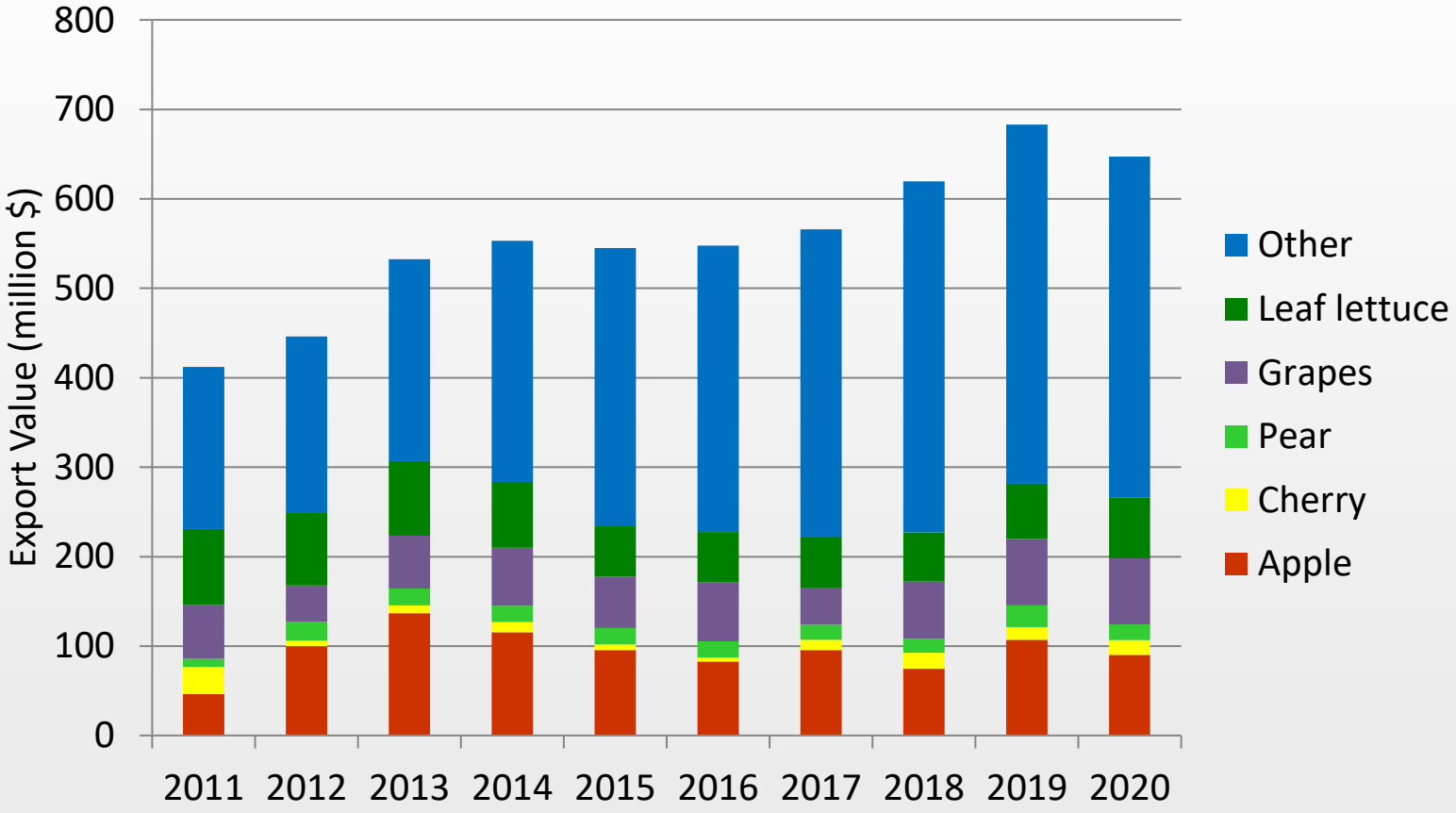
Comparisons are based on the combined certifier organic data and the statewide data from NASS and WSDA

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 49); most of the trade is with Canada. U.S. imports of organic corn and soybean have declined from their highs, while organic avocado, blueberry, coffee and banana imports have risen (slide 50). The estimated $90 million of organic apple exports in 2020 is diminished by the $46 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 51.

U.S. Organic Exports

Apples ($90 mil) were the leading U.S. organic produce export in 2020, followed by grapes ($74 mil) and leaf lettuce ($68 mil).



"other" is all other select organic exports tracked by GATS

Source: USDA-FAS GATS

U.S. Organic Imports

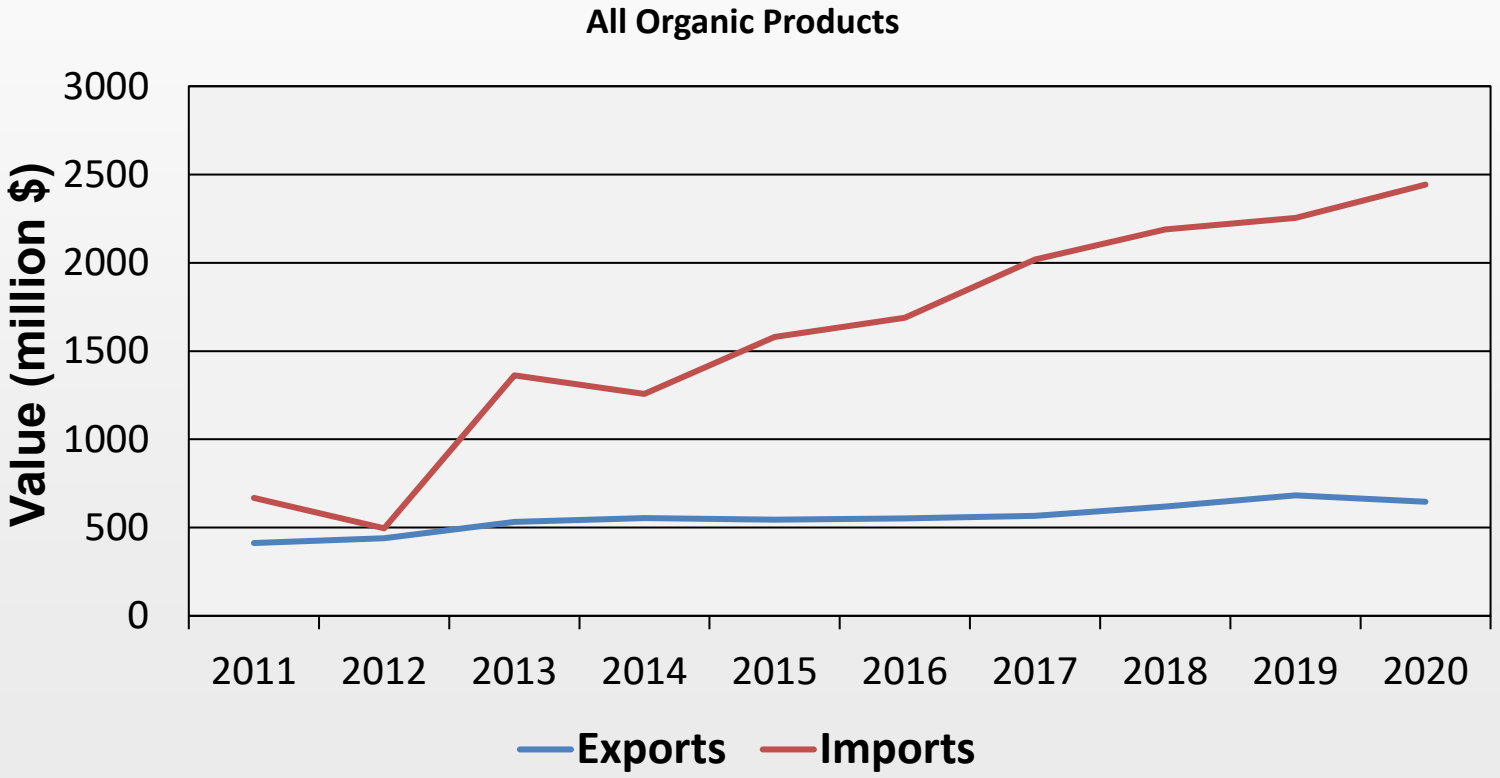
The top 8 organic imported products in 2020 (below) accounted for 74% of all import value. Of these 8, two (coffee, banana) are primarily tropical crops, while two (blueberry, soybean) are major conventional crops in the U.S.

Product	Import Value ($ million)
Coffee	449
Banana	315
Olive oil	278
Blueberry	252
Soybean	168
Sugar	125
Avocado	135
Bell pepper GH	91

Source: USDA-FAS GATS

U.S. Organic Trade

Value of U.S. organic imports has exceeded organic exports for the past 10 years. The “organic deficit” reached a record $1.8 billion in 2020.



Source: USDA-FAS GATS

2019 NASS Organic Survey

	WA	CA
% of US cert. organic farms	4.5	18.2
% of US cert. organic cropland	2.7	12.4
% of US total organic sales	8.9	36.2
WA ranks #2 after CA		
% of US organic crop sales	12.4	49.7
Est. $ sales per acre cropland	7,523	6,557
WA ranks #1, US ave. is $1,645/ac		

WA grows a higher percentage of high-value specialty crops compared to most states.

2019 NASS Organic Survey

WA Organic Fruit Production

	% US*	US rank	Top State	Value Mil $
Apple	93.3	1	WA	447.6
Cherry, sw	91.8	1	WA	28.37
Pear	73.7	1	WA	18.3
Apricot	21.6	2	CA	1.2
Nectarine	22.1	2	CA	2.4
Peach	17.8	2	CA	3.9
Blueberry	45.7	1	WA	74.3
Raspberry	10.8	2	CA	0.6
Grapes	6.4	2	CA	8.9

* WA share of total US production

WA accounts for 30.9% of US farmgate organic fruit sales worth $590 mil

2019 NASS Organic Survey

WA Organic Vegetable Production

	% US*	US rank	Top State	Value Mil $
Carrot	5.1	2	CA	6.31
Herbs	7.9	2	CA	--
Onion (all)	13.6	3	OR	--
Peas, gr	39.0	1	WA	8.39
Potato	19.3	2	CA	8.91
Spinach	1.8	2	CA	4.21
Squash	10.7	2	CA	5.38
Sweet corn	40.8	1	CA	9.84
Other	--	2	CA	11.31

* WA share of total US production

WA accounts for 3.8% of US farmgate organic vegetable sales worth $80 mil

2019 NASS Organic Survey

Livestock

	# farms	Peak animals	% of US
Milk cows	45	9,657	2.7
Other cows	60	8,320	
Layers	29	1.026 mil	5.1
Broilers	13	2.108 mil	7.2
		Production	
Milk	45	136.89 mil lb	2.7
Eggs	25	18.201 mil doz	4.6

2019 organic milk value = $39.2 mil
2019 organic egg value = $52.9 mil

Visit our websites for more information!

http://csanr.wsu.edu/pages/Organic_Statistics or
http://tfrec.cahnrs.wsu.edu/organicag/organic-statistics/

Citation: Granatstein, D. and C. Miles. 2021. Current status of organic agriculture in Washington State: 2020. Organic Trend Series, Center for Sustaining Agriculture and Natural Resources, Washington State University, Wenatchee, WA.

Photo: Sunbreak Farm website