

# Current Status of Certified Organic Agriculture in Washington State: 2021

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*Photo: C. Miles*

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### 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 2021 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 found in the NOP database but no area or crop details are available.

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

06/24/22. This document is preliminary as the farm sales data for 2021 have not been received. This will be updated once they have been received and analyzed.



# 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 2020.

The organic market overview for 2020 shows global sales of organic food of US\$129 billion, up 15% from the previous year. The U.S. was the largest single country market (\$56.4 billion), followed by Germany (\$17.1 billion), France (\$14.5 billion), and China (\$11.6 billion). Switzerland was the country with the highest per capita organic expenditure, at about 7% of total food dollars (slide [5](#)).



# Consumer Demand for Organic Food

Global market, 2020 - US\$129 billion

## Leading countries (billion \$):

USA	56.4
Germany	17.1
France	14.5
China	11.6
Canada	4.9

## Per capita consumption of organic:

Switzerland	418 €/yr (~7% of food \$)
Denmark	384 €/yr
Luxemburg	285 €/yr
U.S.	148 €/yr

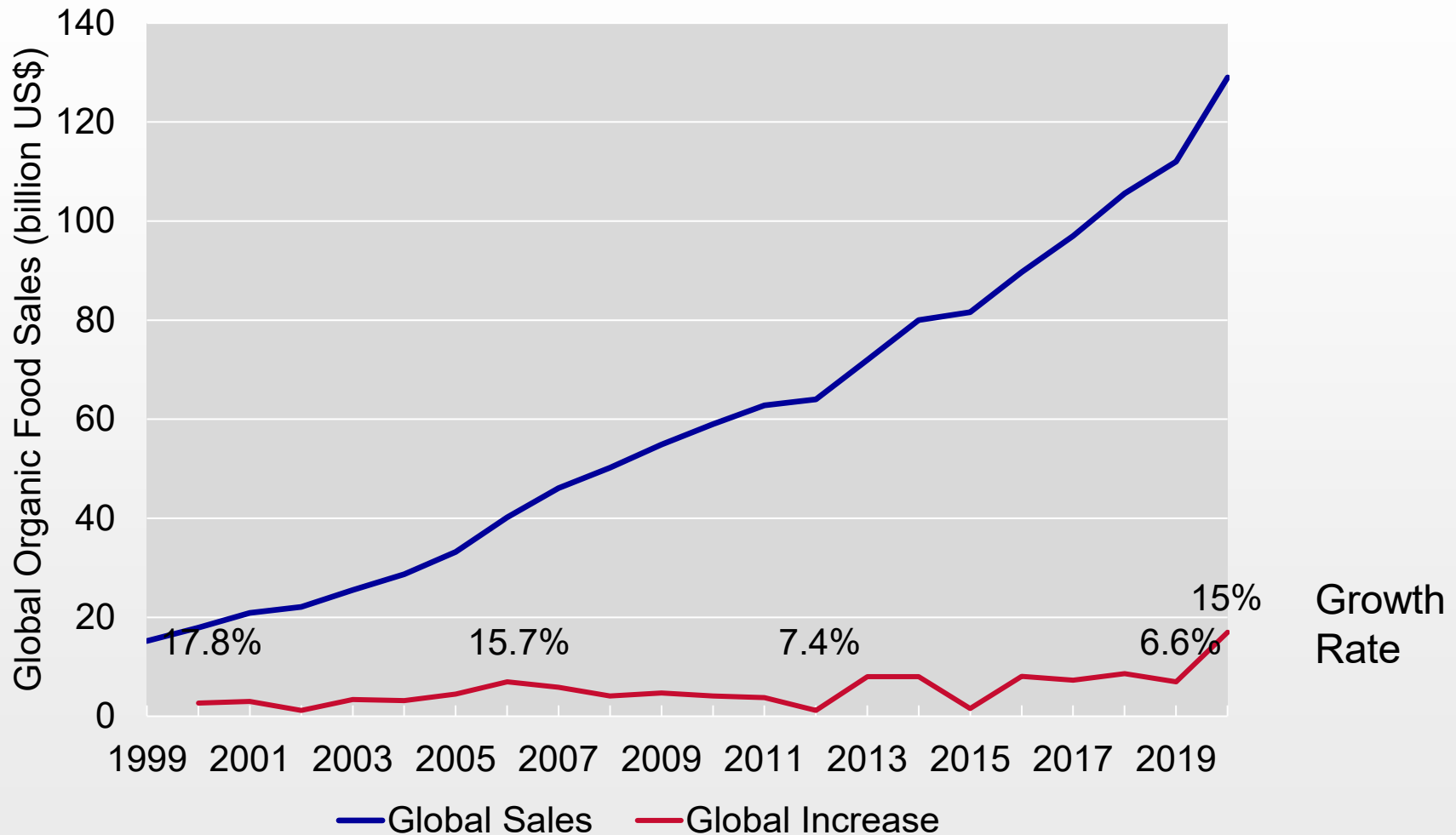


The steady increase in global organic sales (slide [7](#)) has been driven by annual growth rates of 10-20% over the last 15 years. Even during the 2008 recession period, global growth was over 7%. Sales increased by about US\$17 billion in 2020 over the previous year, driven by changed behavior due to the COVID pandemic.

North America and Europe have accounted for some 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.



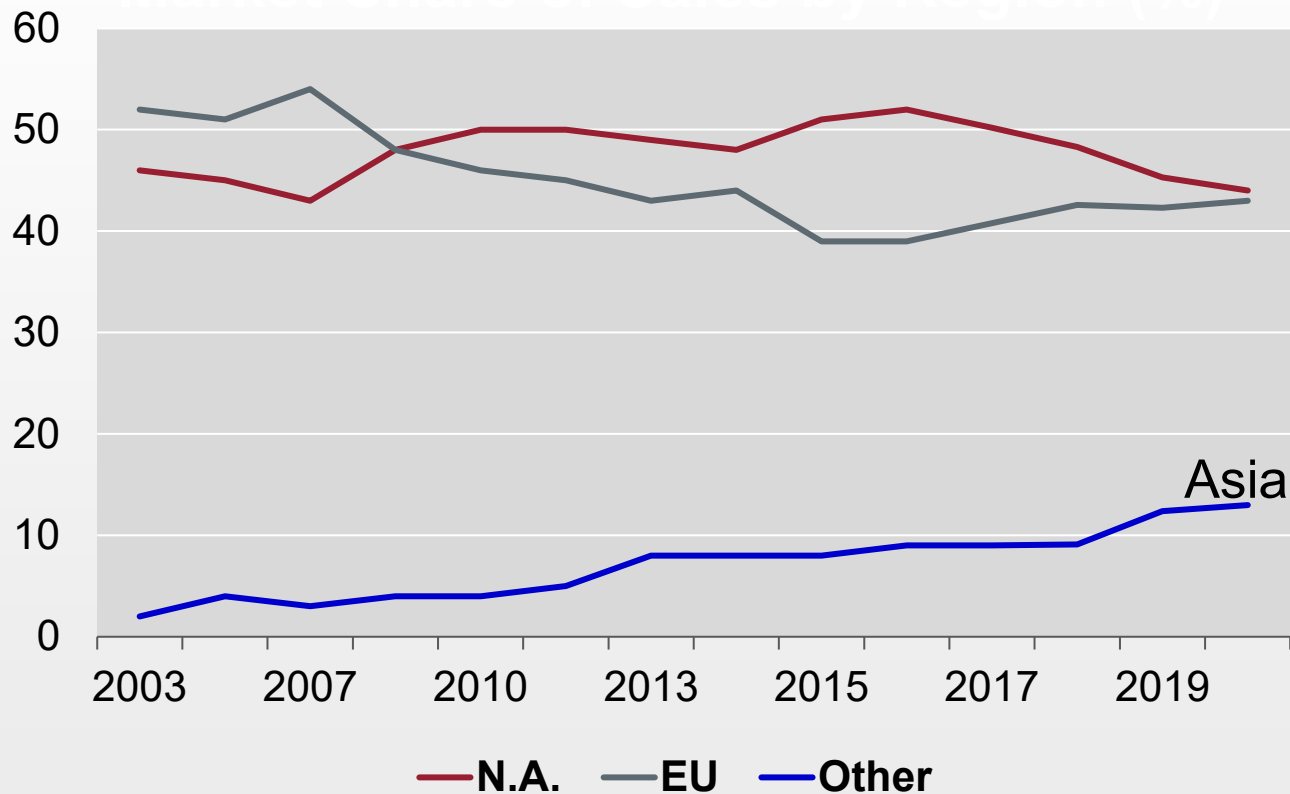
# Consumer Demand for Organic Food





# 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=Europe





In 2020, there were an estimated 185.0 million acres of agricultural land (cropland, permanent crops, permanent grassland, other) under organic management worldwide, up 3.6% from 2019, and equaling about 1.6% 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 9.1 million ac of organic agricultural land, of which 33% was arable land. From 2011 to 2020, global organic arable land grew from 18.7 million ac to 32.4 million ac (+73%), and permanent crop land grew from 7.2 million ac to 12.8 million ac (+78%). 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	0.8%	Grapes	7.2%
Medicinals	9.2%	Berries	11.7%
Vegetables	0.7%	Temperate fruit	2.2%

*Source: World of Organic Agriculture*



## National Trends

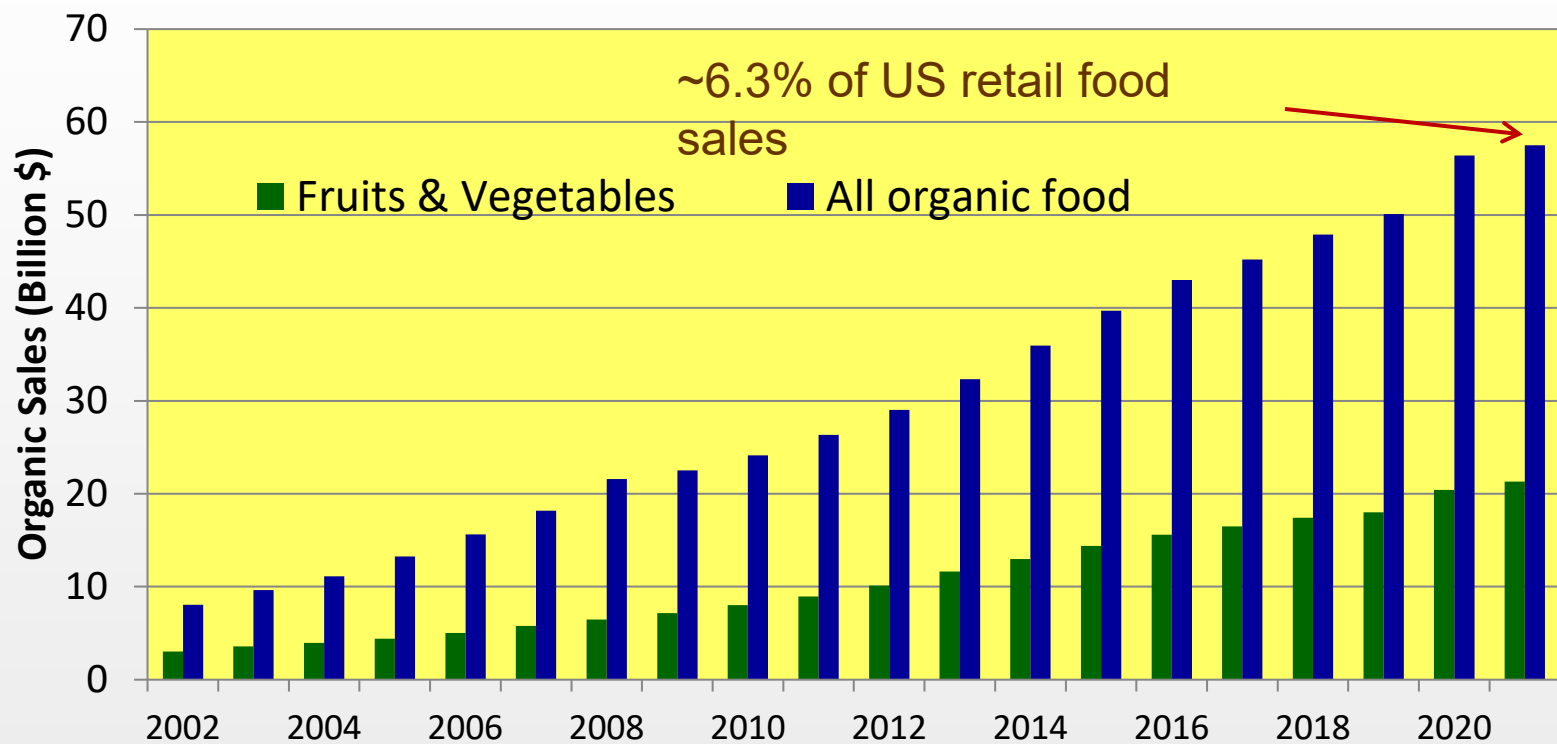
The Organic Trade Association (OTA) in Vermont, USA, commissions an annual organic industry survey. Some highlights are available on line <https://www.ota.com/>. It contains details on sales value of overall organic products, organic foods, and various subcategories (e.g., produce, dairy, bread), with 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 about 2% in 2021 as shopping habits returned to normal after the pandemic. Organic food sales were an estimated 6.3% 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 **2%** in 2021. Organic fruits and vegetable sales increased **4%** and were **36%** of all organic food sales (and 15% of all US produce 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.agcensus.usda.gov/Publications/Organic\\_Survey/](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.



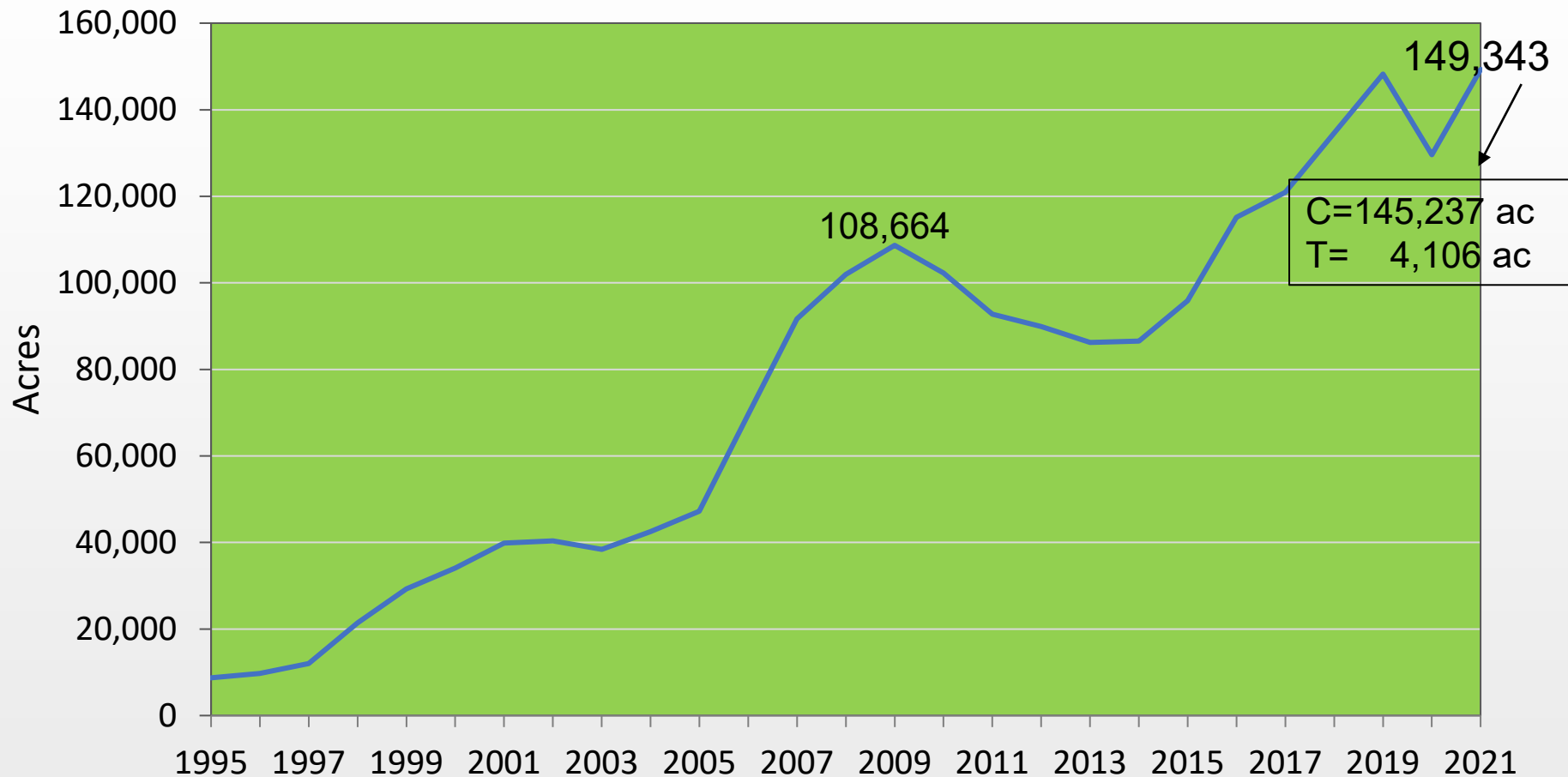
# Washington State Trends

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 14% in 2020, but increased 15% in 2021 to a new record of 149,343 acres. “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 29% of land in 2021. Grains acreage shrunk by 9%, vegetables were up 25%, and small fruits continued to expand due to more blueberries (slide [15](#)). 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 2005-2020.  
WSDA only 1995-2003; additional data added from other certifiers beginning in 2004.



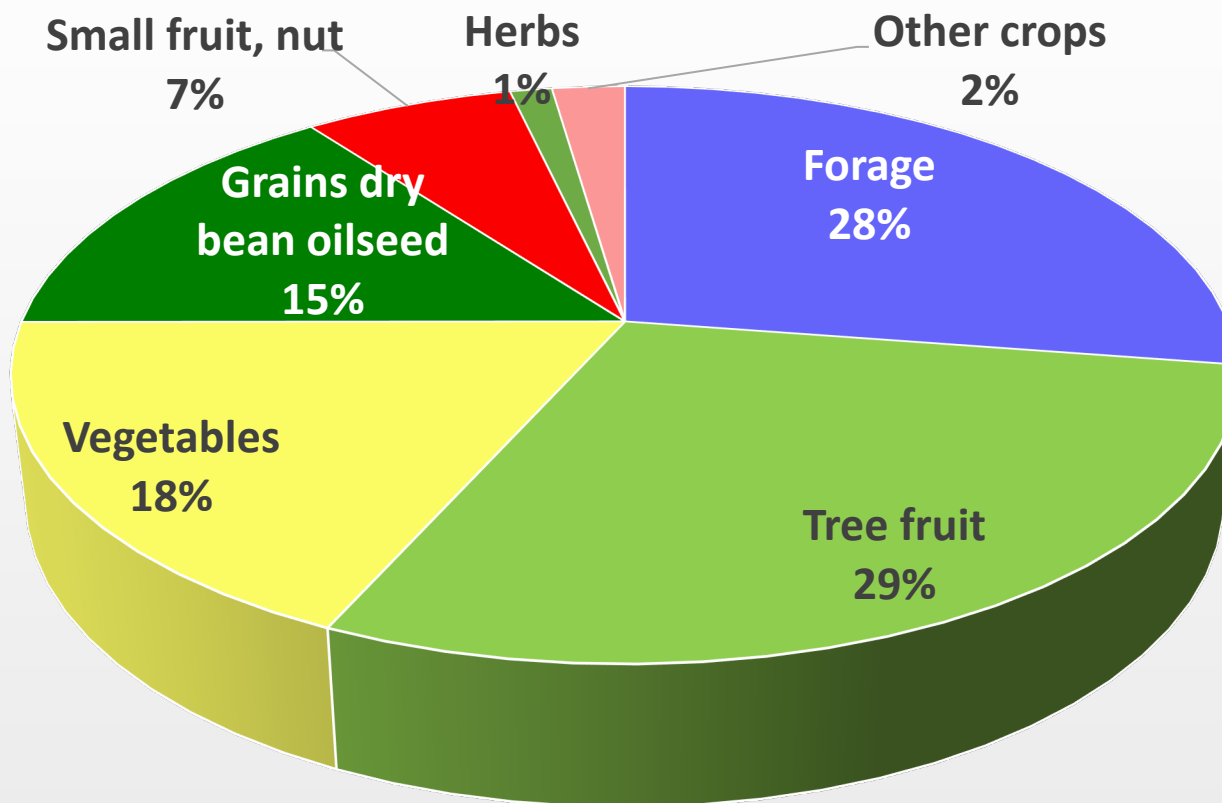
# Certified Organic Crop Acres Washington State

	Acres			% Chg 20-21	% of total
	C 2020	C 2021	T 2021		
Forage	33,637	34,722	1,011	3.2	27.4
Vegetable	18,391	23,142	0	25.8	18.3
Tree Fruit	39,021	37,117	2,037	-4.9	29.3
Grains/Dry Beans/Oilseeds	20,611	18,785	128	-8.9	14.8
Small Fruit, Grapes, Nuts	7,341	8,344	475	13.7	6.6
Herbs	1,499	1,671	0	11.5	1.3
Other crops and land	2,316	2,905	79	25.4	2.3
Undefined land	0	0	0	--	--
Total acres (with double crop)	122,816	126,686		3.1	--
Total area (site acres)	124,213	145,237	3,730	16.9	--

C=certified; T=transition; % Chg is change in certified acres from 2020 to 2021; % of total is for 2021 certified acres. 2021 combined certifier data include an estimated 4,015 ac of double crop; 2020 data include estimated 1,693 ac double crop.



# Distribution of Certified Organic Acres Washington 2021



Certified crop acres\*: 126,686

\*includes 4,015 ac double crop

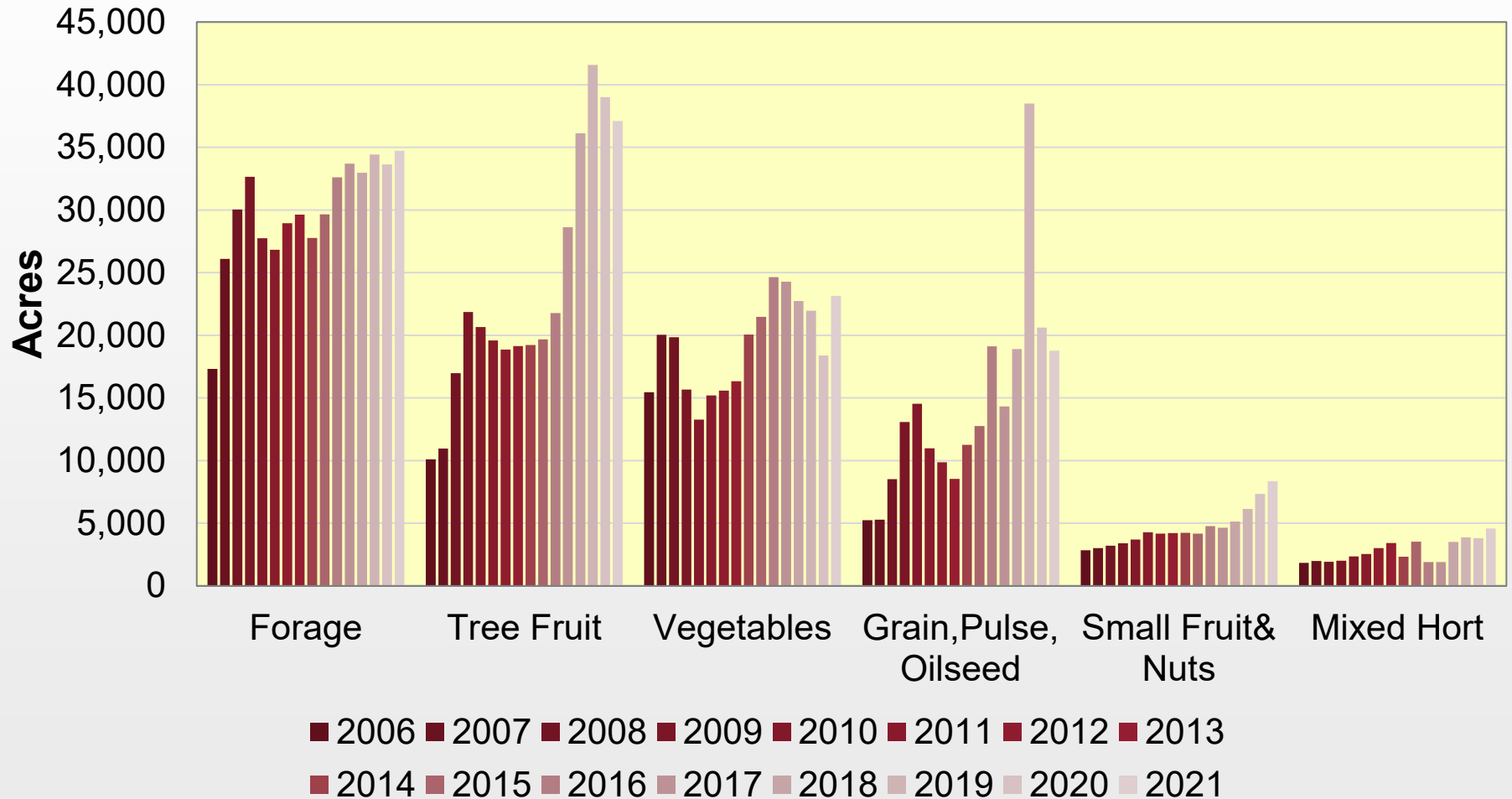
Transition crop acres: 3,730

Total certified site area = **145,237 ac**





# Distribution of Certified Organic Acres Washington State



Combined certifier data; double crop acres included

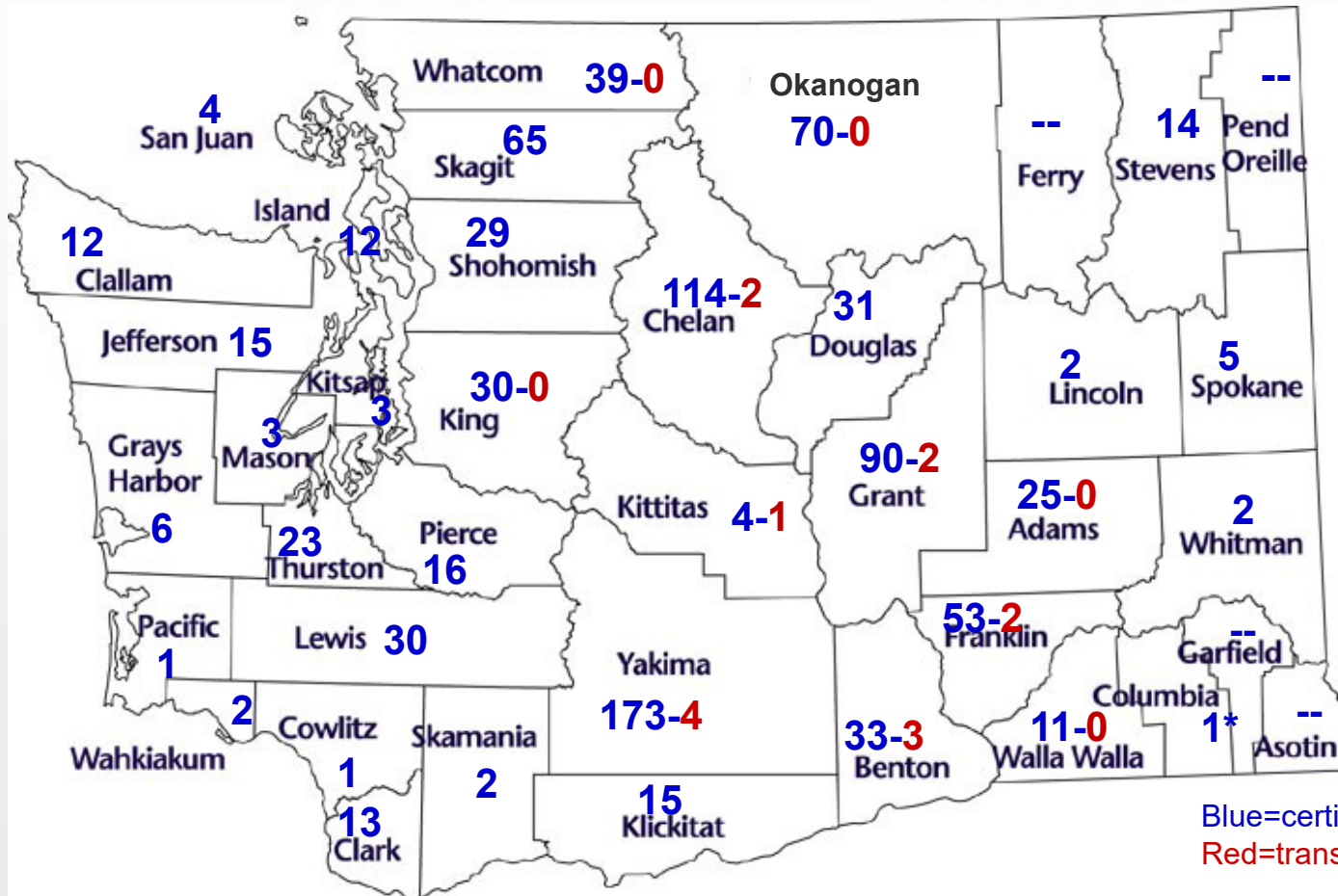


The **spatial distribution** of organic farms in Washington by county is shown by farm number (slide [19](#)) and area (slide [20](#)). Four counties showed no certified farms in 2021. Grant County had the highest number of certified acres, while Yakima had the highest number of certified farms. Statewide, **949** farms were certified organic in 2021, with 17 certified but with no details available. Another **14** farms were registered as transition only, for which acreage detail is available. Eastern WA counties had **68%** of the certified farms by number and **80%** 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](#). Site area reached a new high in 2021 while farm number was little changed. 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 2021 was on existing certified farms in eastern WA. (slide [23](#))



# 2021 Number of Certified Farms by County



# Farms  
949 certified  
12 transition only

Eastern WA  
68% of farms

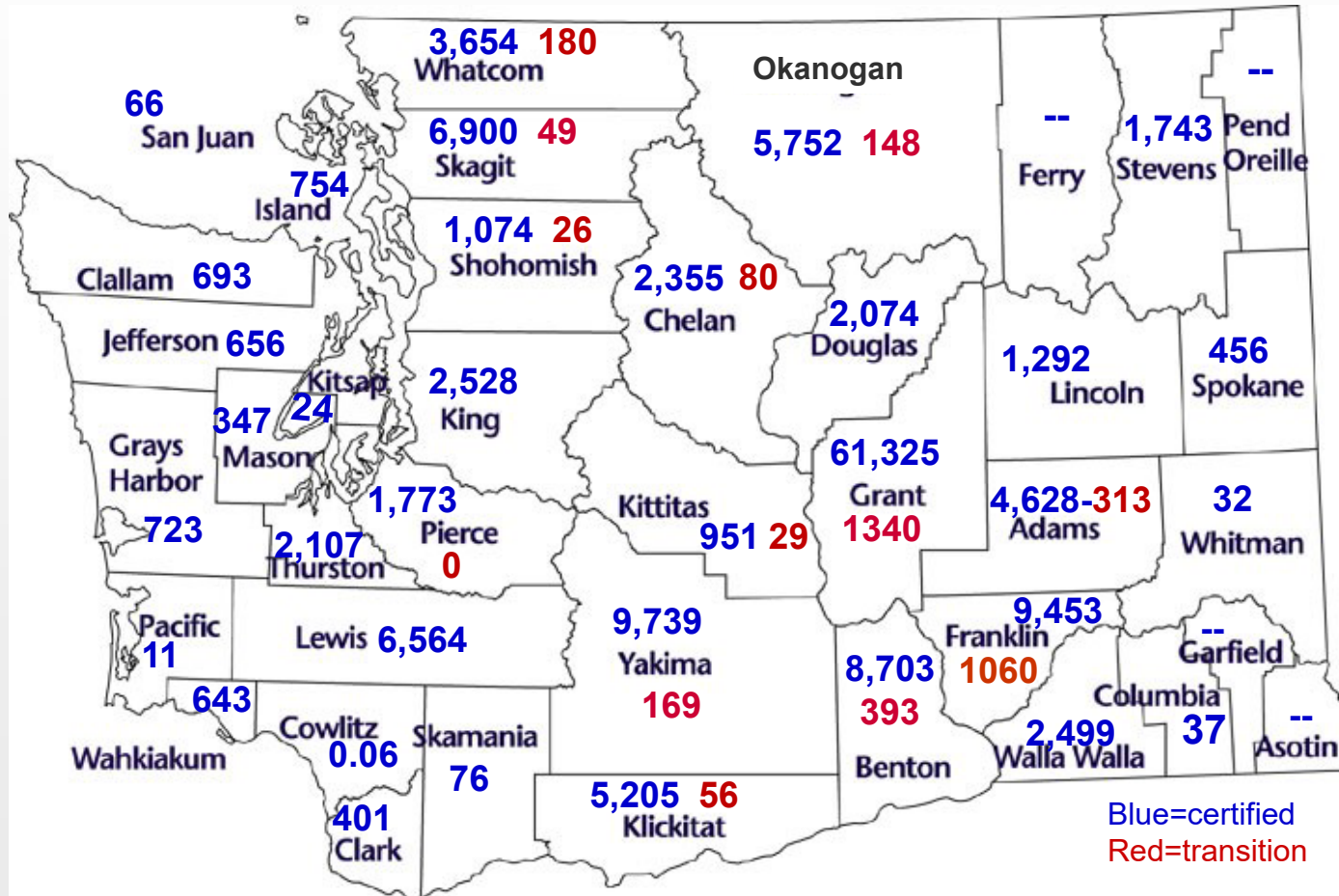
Western WA  
32% of farms

Blue=certified producers (primary county)  
Red=transition only producers

WSDA, OTCO, CCOF data only. T only value may include a few farms pending certification. \*1 farm in Columbia Co, but business address is in another.



# 2020 Certified Farm Area by County (acres)



Area\*  
Cert 145,237 ac  
Trans 4,106 ac

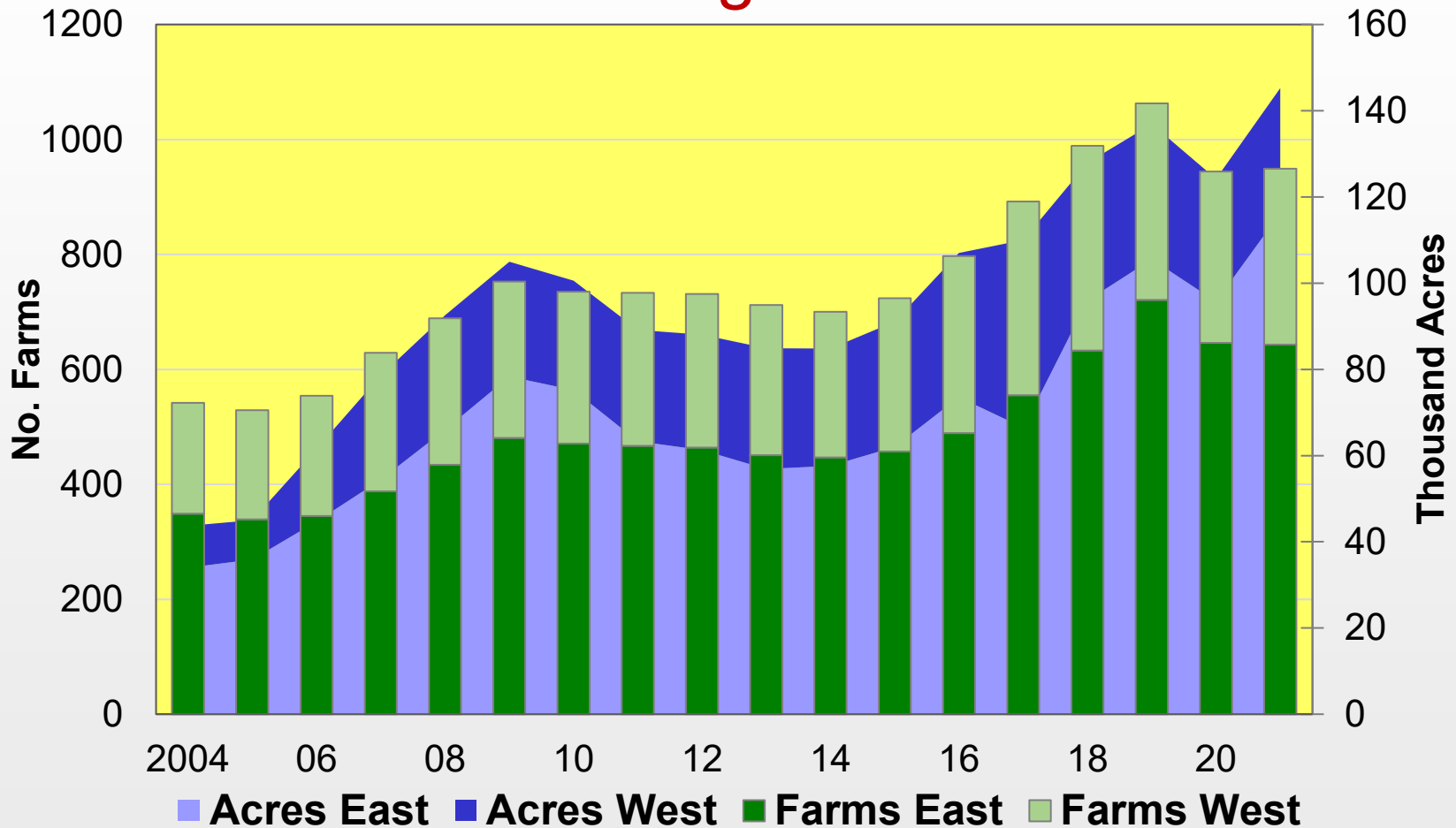
Eastern WA  
80%  
of certified ac

Western WA  
20%  
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. Does not include acreage from farms in the NOP database certified by other than WSDA, OTCO, CCOF.



# Certified Farms and Area by Region Washington State



*Combined certifier data WSDA, OTCO, CCOF. An additional 17 farms certified by other certifiers not included in acres 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



*Photos: Organic Trade Assoc.*

	2009	2012	2015	2018	2019	2020	2021
Site area	Acres						
Certified	104,962	88,072	91,088	127,960	142,670	124,213	145,237
Transition	3,703	1,817	4,800	6,693	5,610	4,315	4,106
No. of producers <sup>a</sup>	753-10	731-3	724-22	989-30	1062-28	944-10	949-14

<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 transition acres only.



## WA Transition Land 2021

	East	West	Total
# farms with Transition acres	66	9	75
# farms T only	14	0	14
% that are T only	21	0	19
% T only farms by region	100	0	--
All T acres (site)	3,833	273	4,106
% by region	93	7	--
T ac on C farms			3,270
T ac on C as % all T ac			80

Majority of Transition (T) is happening on previously Certified farms who are expanding, and in eastern WA. Transition acres decreased 16% from 2020.



The following group of slides shows more detail on several of the major crop categories. In 2021, **organic tree fruit** (slide [25](#)) accounted for 29% of total organic crop acreage, but for over 50% of farmgate sales, given its high value per acre. Organic apple acreage declined 5% from the previous year and transition acres increased a bit. Pear and cherry acreage each declined slightly. 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 2020 reduction to near zero acres for snap beans repeated in 2021. Sweet corn and green peas, which are often double-cropped, still have the largest area. These two organic crops are estimated to account for 9% and 17%, respectively, of all acres of those crops grown in the state.





# Organic Tree Fruit Acres Washington State

--- Certified acres ---									Trans acres†
	2010	2014	2016	2017	2018	2019	2020	2021	2021
Apple	14,790	14,052	16,191	22,116	28,473	32,537	30,424	28,750	1,836
Pear	2,033	1,843	2,243	2,763	3,263	4,201	4,256	4,205	83
Cherry	2,147	1,939	2,078	2,546	3,014	3,352	3,180	3,053	61
Apricot*	299	299	251	216	271	360	268	274	20
Nectarine	550	440	379	357	470	472	318	371	29
Peach	701	580	553	580	580	602	469	416	8
Plum/Prune*	125	58	76	45	49	53	106	46	1
Mixed, other	13	17	--	1	4	2	0	18	
Total*	20,658	19,228	21,771	28,624	36,122	41,580	39,021	37,135	2,037

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

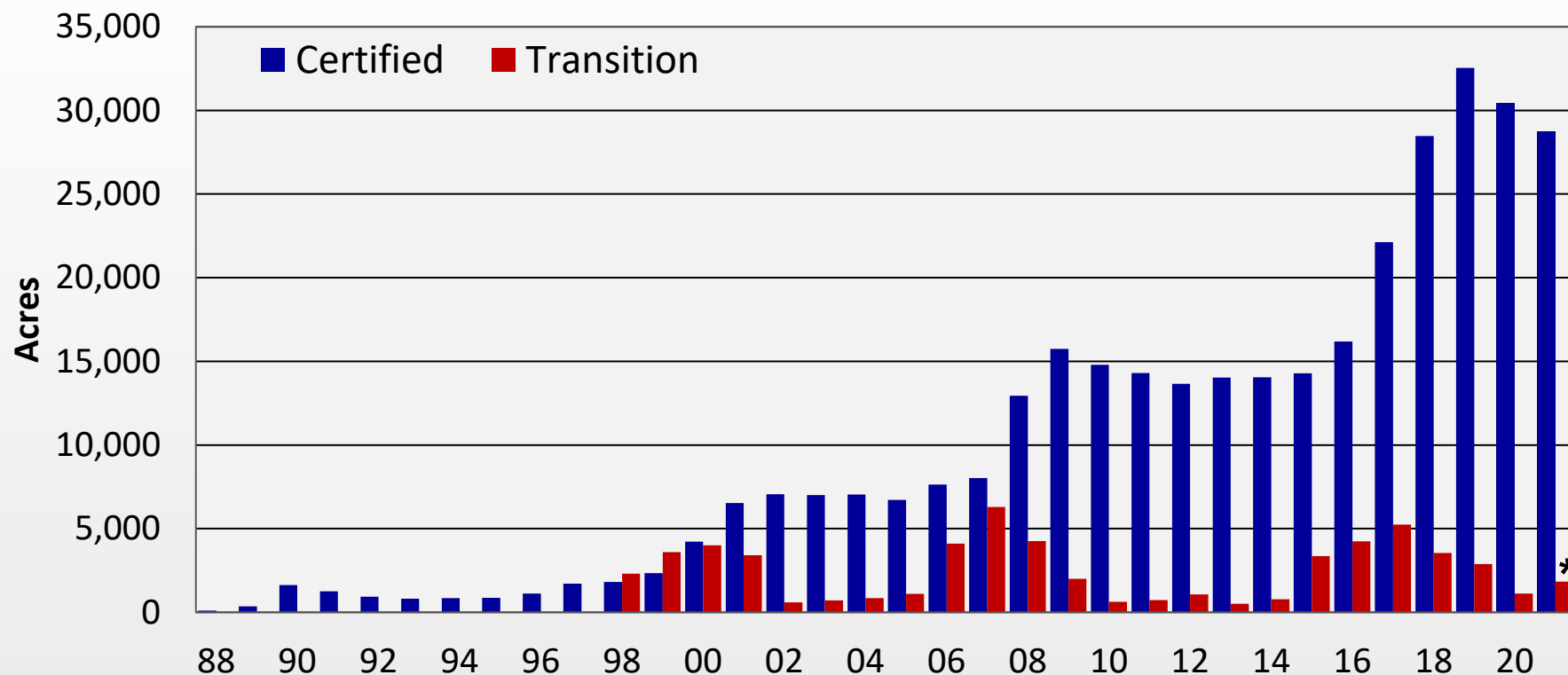
†only those acres registered with a certifier

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



Photo: F. Peryea

# Organic Apple Acreage Washington State



**Cert. organic apples = 16% of WA apple acreage**  
(based on 2017 NASS value of 179,146 acres)

\*Transition acres from WSDA and OTCO



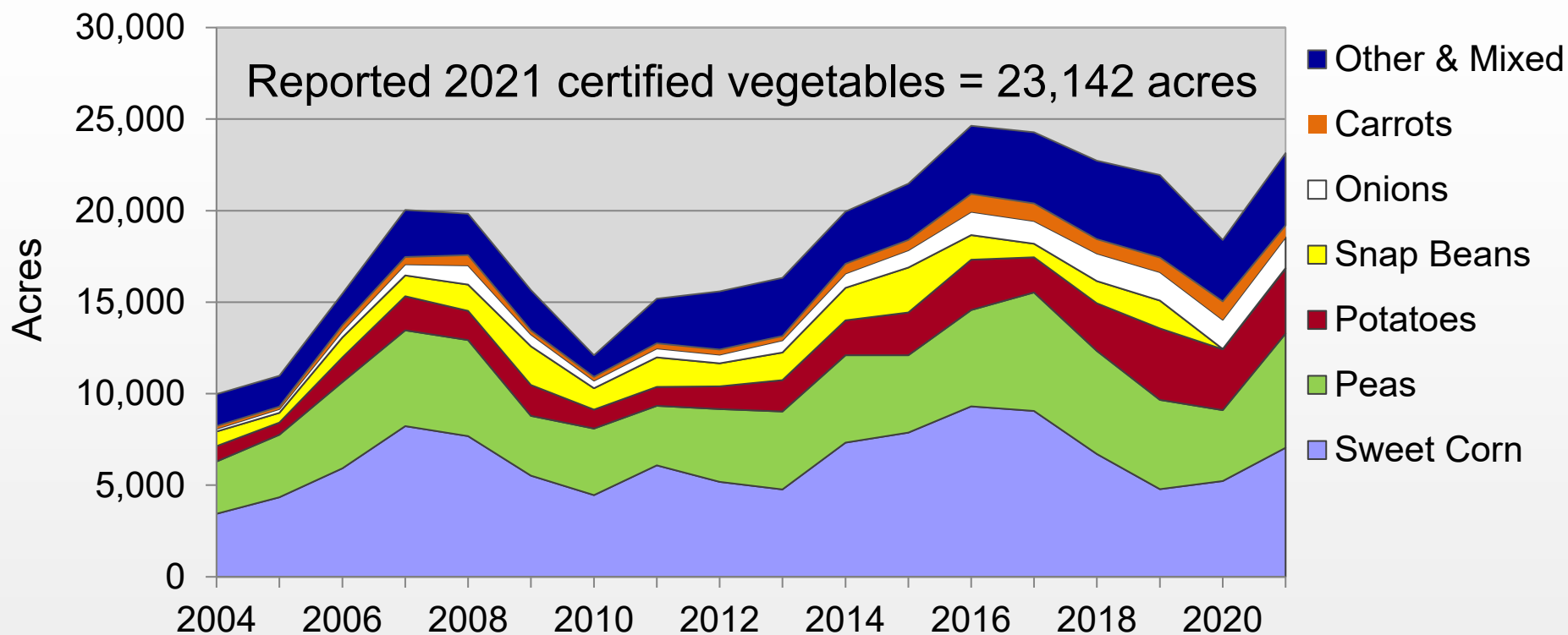
More information on Washington organic tree fruit statistics  
is available on-line at:

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





# WA Organic Vegetable Acres



Estimated organic acreage share: Sweet corn 9.0%;

Peas 17.3%; Onion 8.4%

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 24% in 2021, with 367 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 increased slightly in 2021. 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](#).

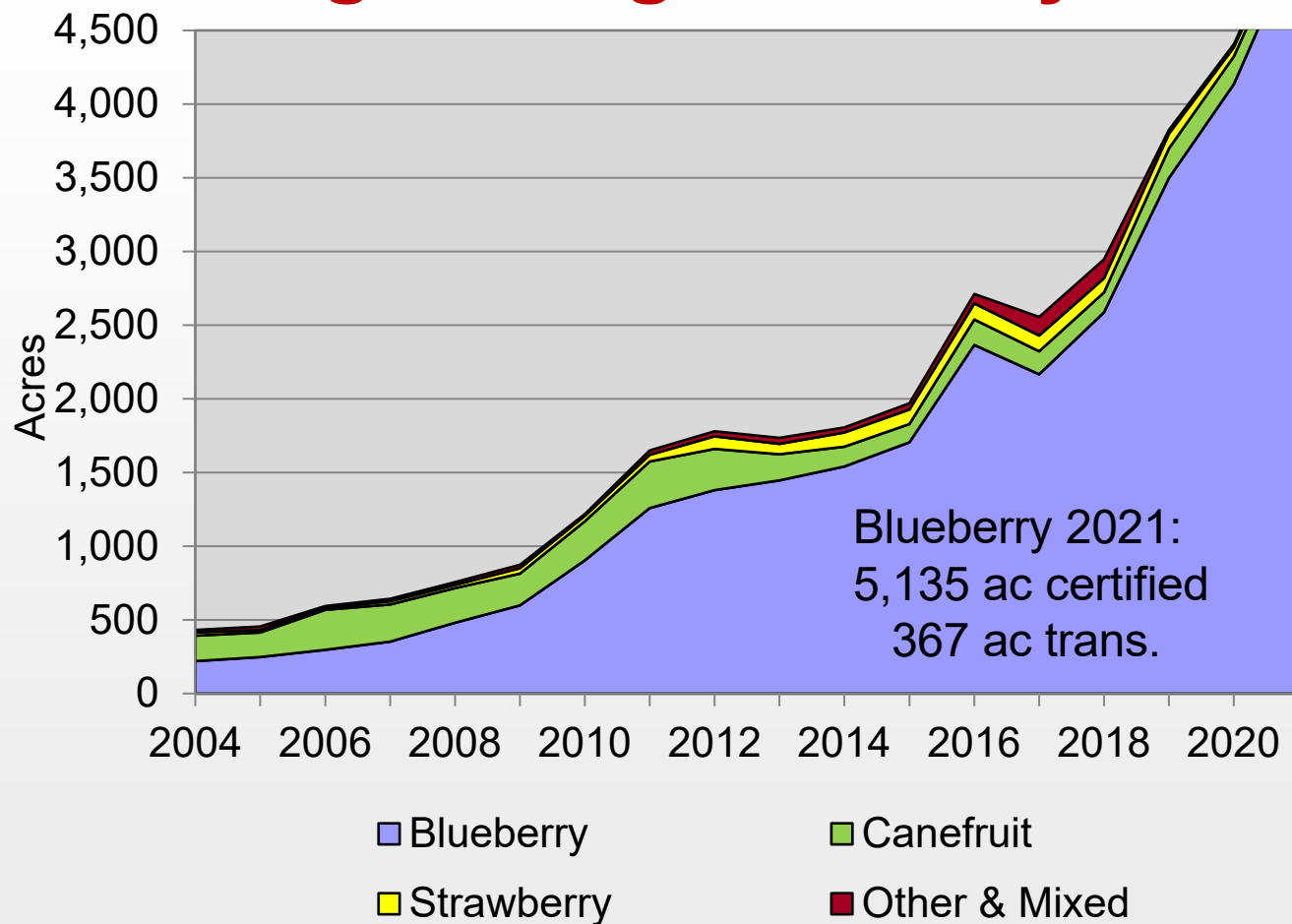


Photo: Blue Dog Farm



Photo: Boistfort Valley Farm

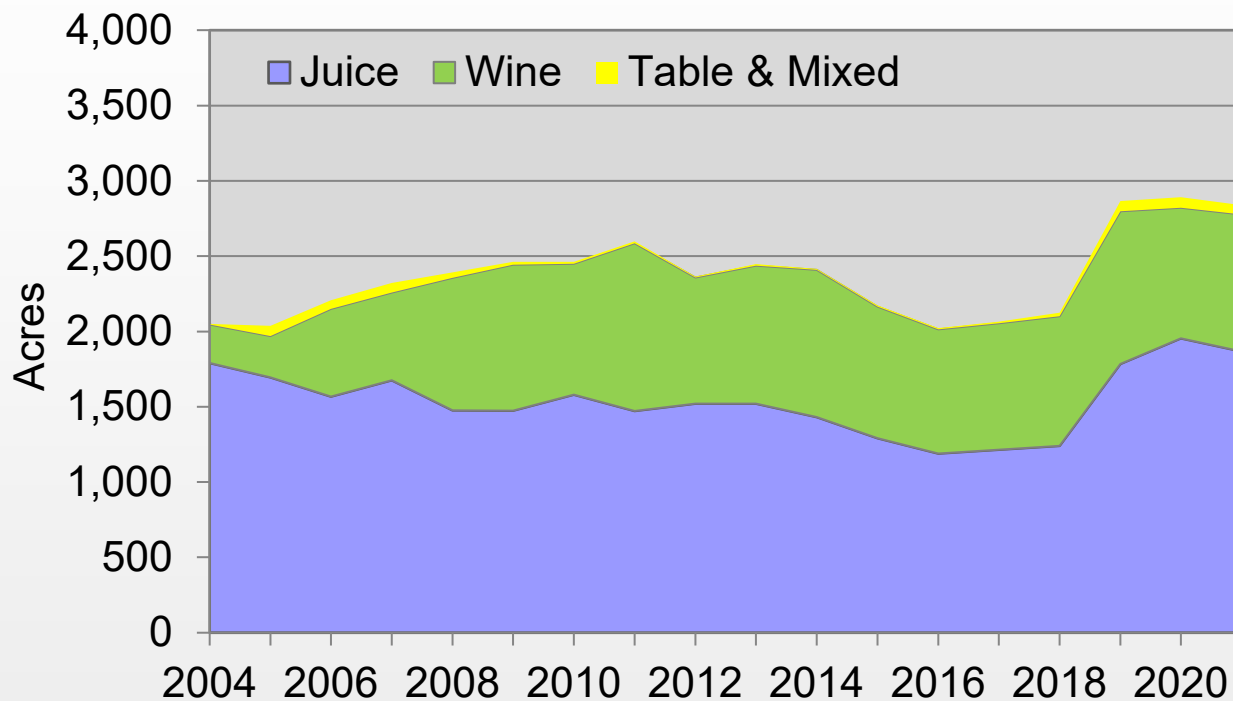
# Washington Organic Berry Acres



Organic is ~25% of total WA blueberry acreage (using 20,200 harvested ac state total from NASS 2021).



# Washington Organic Grape Acres



Reported 2021 total certified grapes = 2,838 acres  
(Concord = 62%)

Estimated organic share of WA grape acreage = 10% of  
juice and 1% of wine grapes







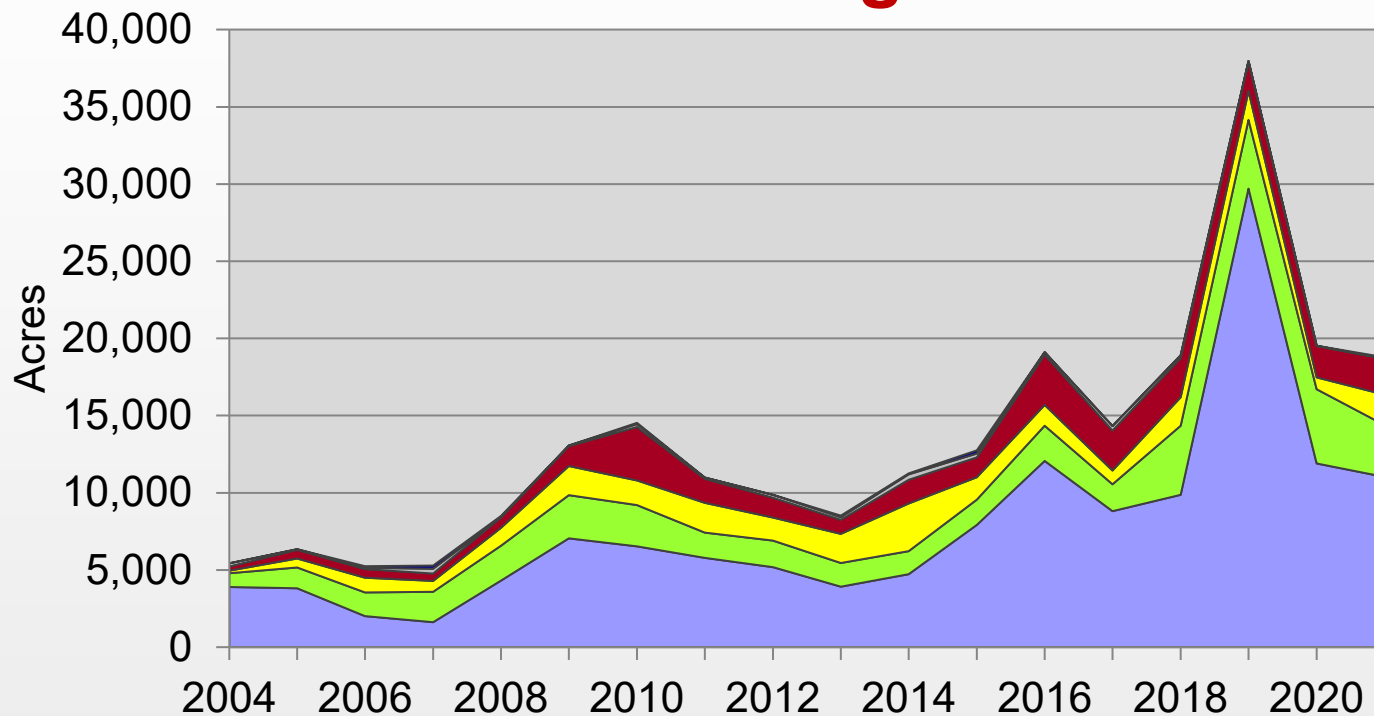
Washington is a major grain producer with extensive wheat production in the dryland regions of eastern Washington. However, it lags behind other states such as Montana and North Dakota for organic wheat production. While demand and prices for organic grains are currently high, dryland organic cereal production remains a challenge in dryland 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 (e.g., emmer, 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 increase for 2021.





# Organic Grain, Pulse & Oilseed Acres Washington State

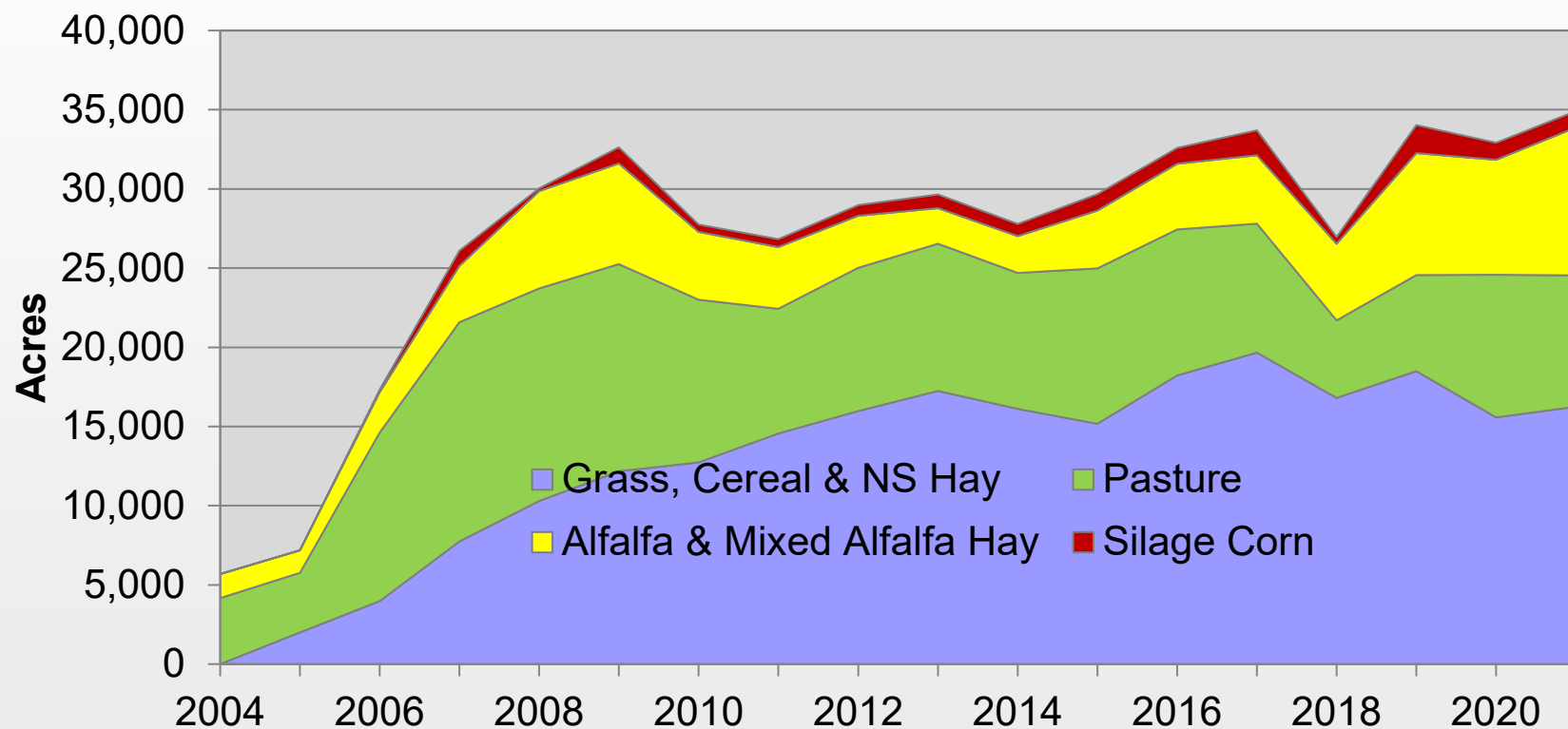


■ Wheat ■ Corn ■ Other cereals ■ Beans & Peas ■ NS Grain ■ Oilseed

Reported 2021 organic grain, pulse and oilseed = 18,785 acres



## Organic Forage Acres Washington State



Reported 2021 WA organic forage total = 34,722 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 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.

Updated data on organic dairy cows have not been available since 2018.



# 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



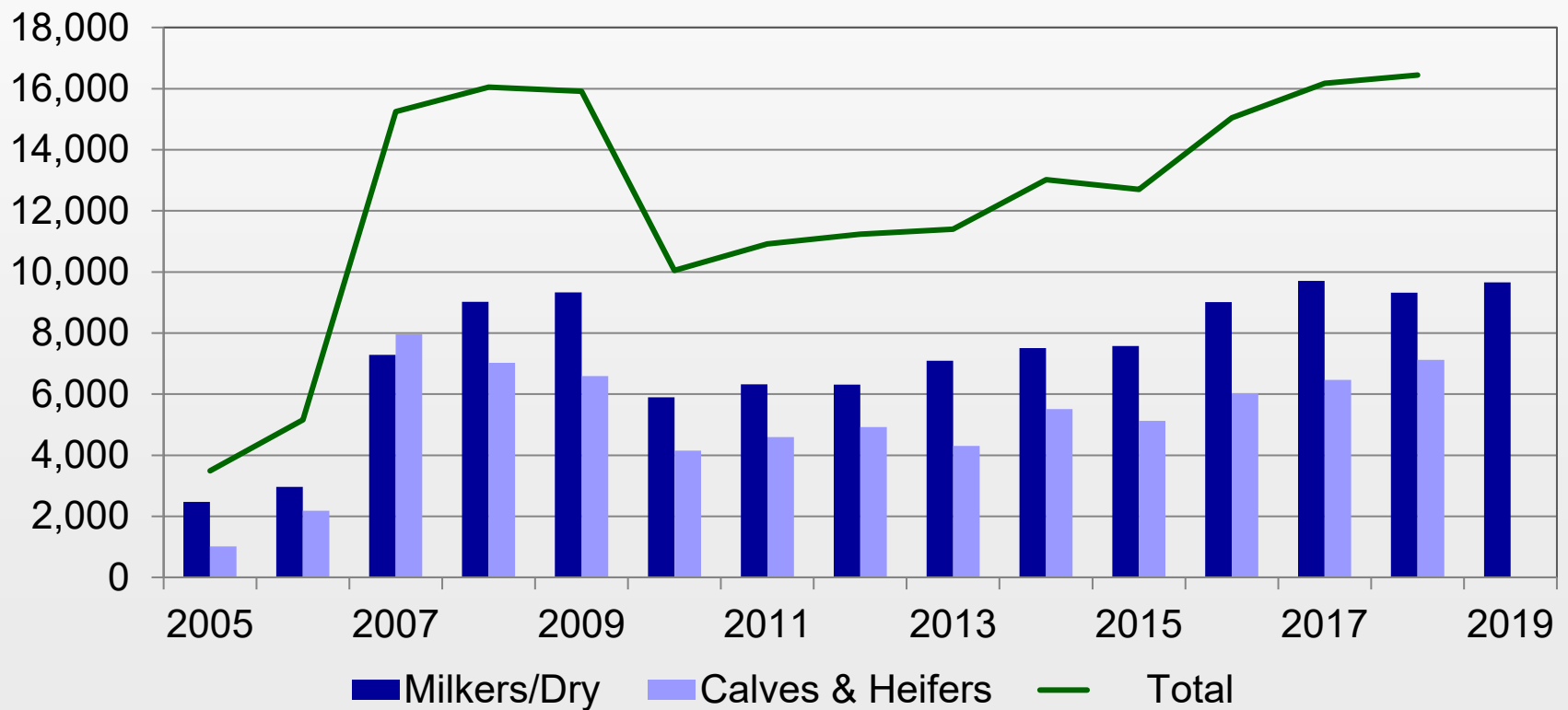
*Photo: Organic Valley*

**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





## 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%

<u>2019 WA</u>	<u># inventory</u>	<u># sold</u>	<u>Sales \$</u>
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

	<u>2016</u>	<u>2019</u>
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





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.

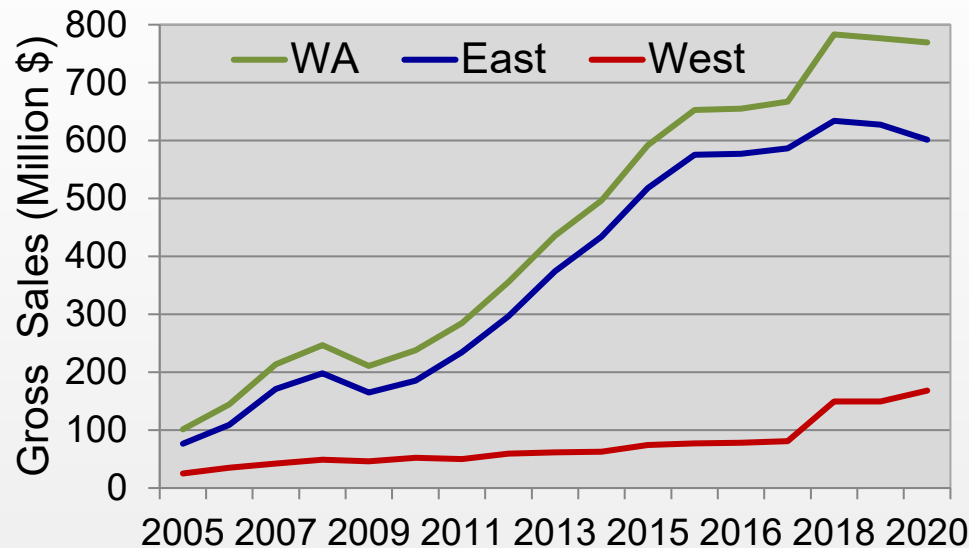
The distribution of organic sales (WSDA-certified only) by farm economic class shows that 35% of farms have annual sales less than \$100,000 in 2020, and in aggregate, these farms account for only 1.5% of all organic sales in the state (slide [45](#)). Farms with more than \$1 million in sales (24% of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



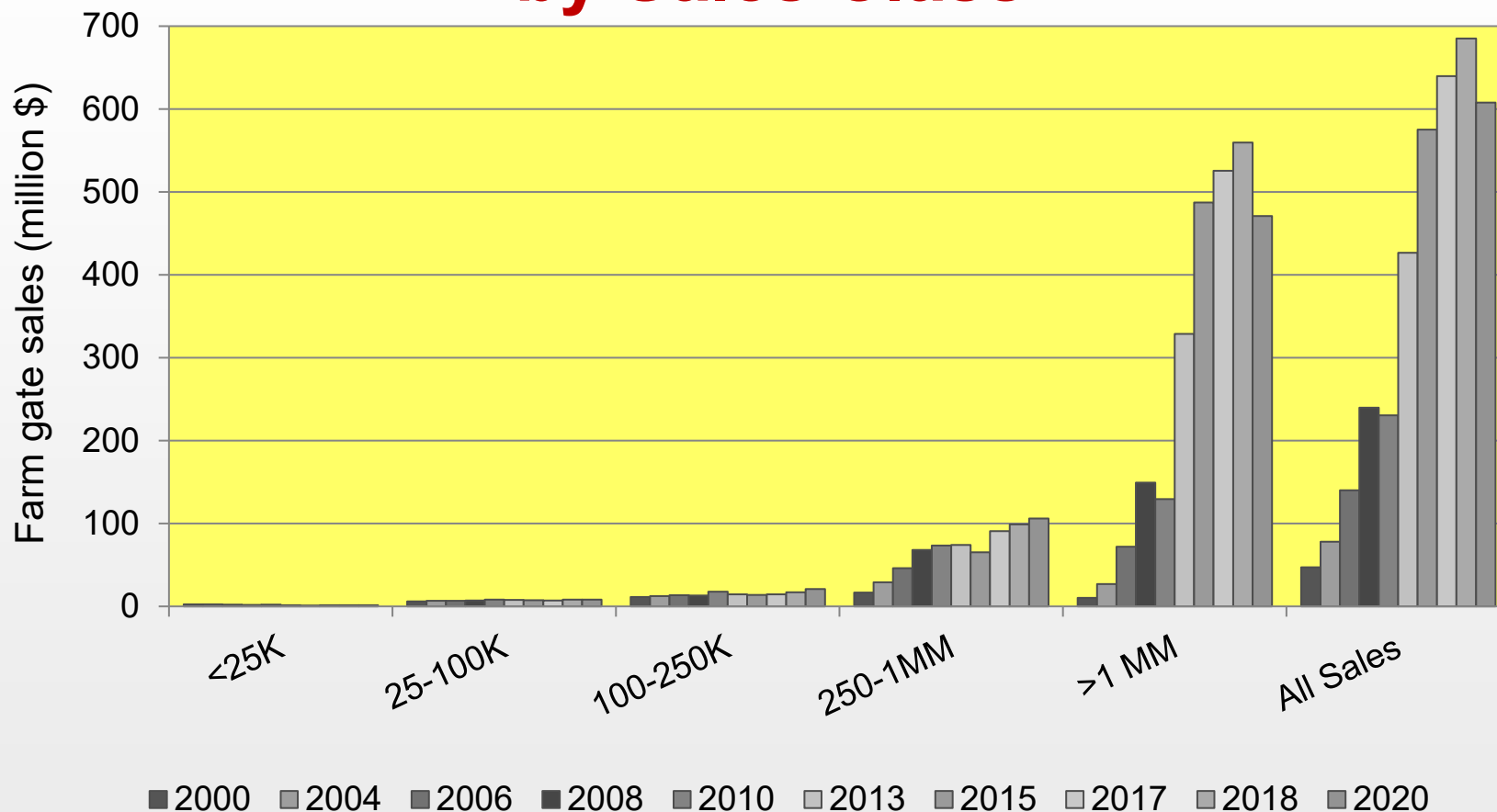
Photo: WSU Small Farms

**\*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\*



## Farm size class by gross annual sales

**\*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

<b>No. Farms</b> (2021 base data, 35,300 farms)	<b>2.7%</b>
<b>Cropland</b> (2017 cropland base data 4.472 mil ac)	<b>3.2%</b>
<b>Value</b> (NASS 2020 data, at least \$8.702 billion)	<b>8.6%</b>

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



*Alvarez Farm produce: C. Donovan*



## Organic Trade

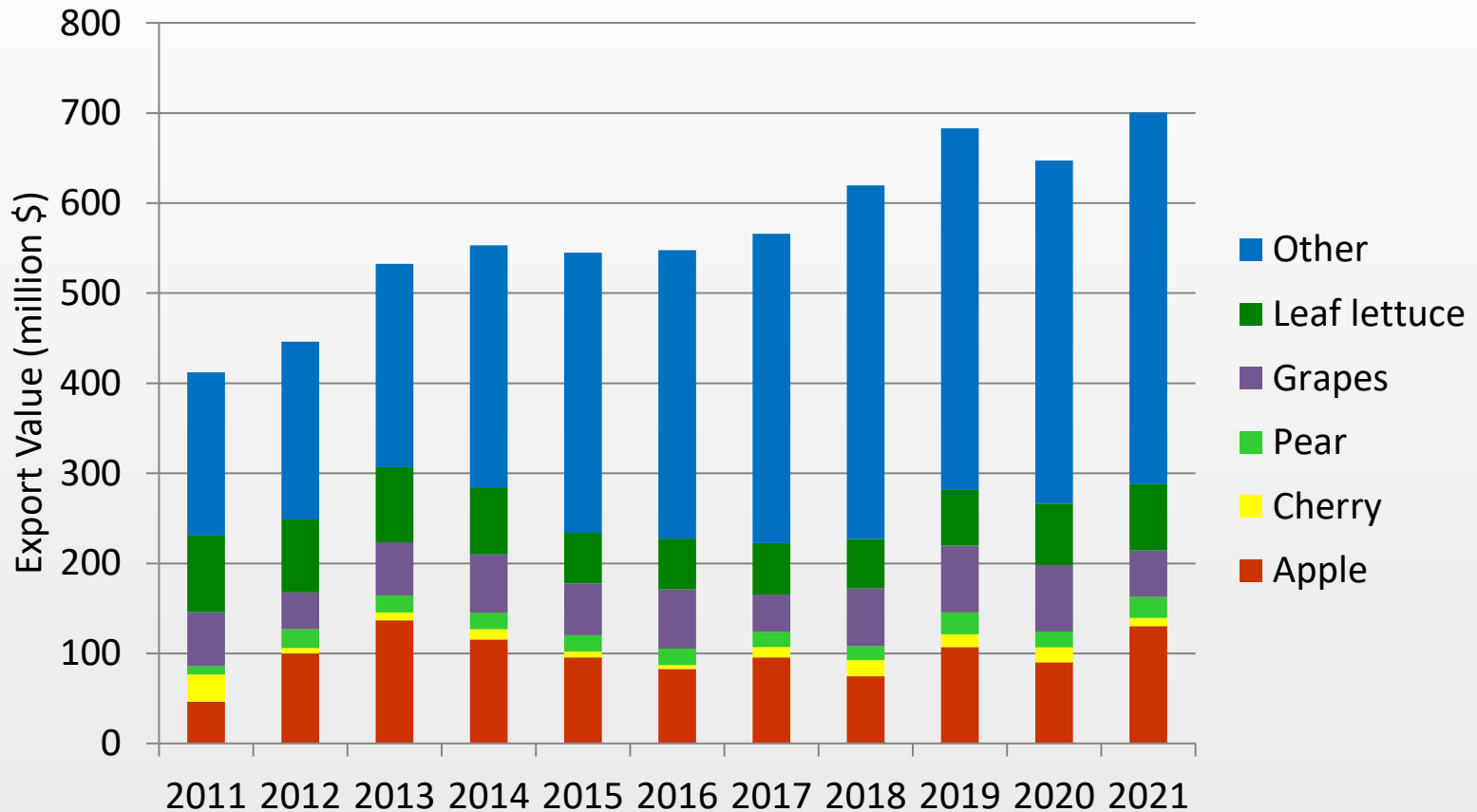
Many organic products are actively exported and imported among countries. Certain tropical products, such as coffee and bananas, account for significant shares of organic imports in the main North American and European markets. Estimates of U.S. organic exports and imports have been made by the USDA 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, banana, and honey imports have risen (slide [50](#)). The estimated \$130 million of organic apple exports in 2021 is diminished by the \$51 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 (\$130 mil) were the leading U.S. organic produce export in 2021, followed by leaf lettuce (\$73 mil) and strawberry (\$62 mil).



*“other” is all other select organic exports tracked by GATS*

Source: USDA-FAS GATS



# U.S. Organic Imports

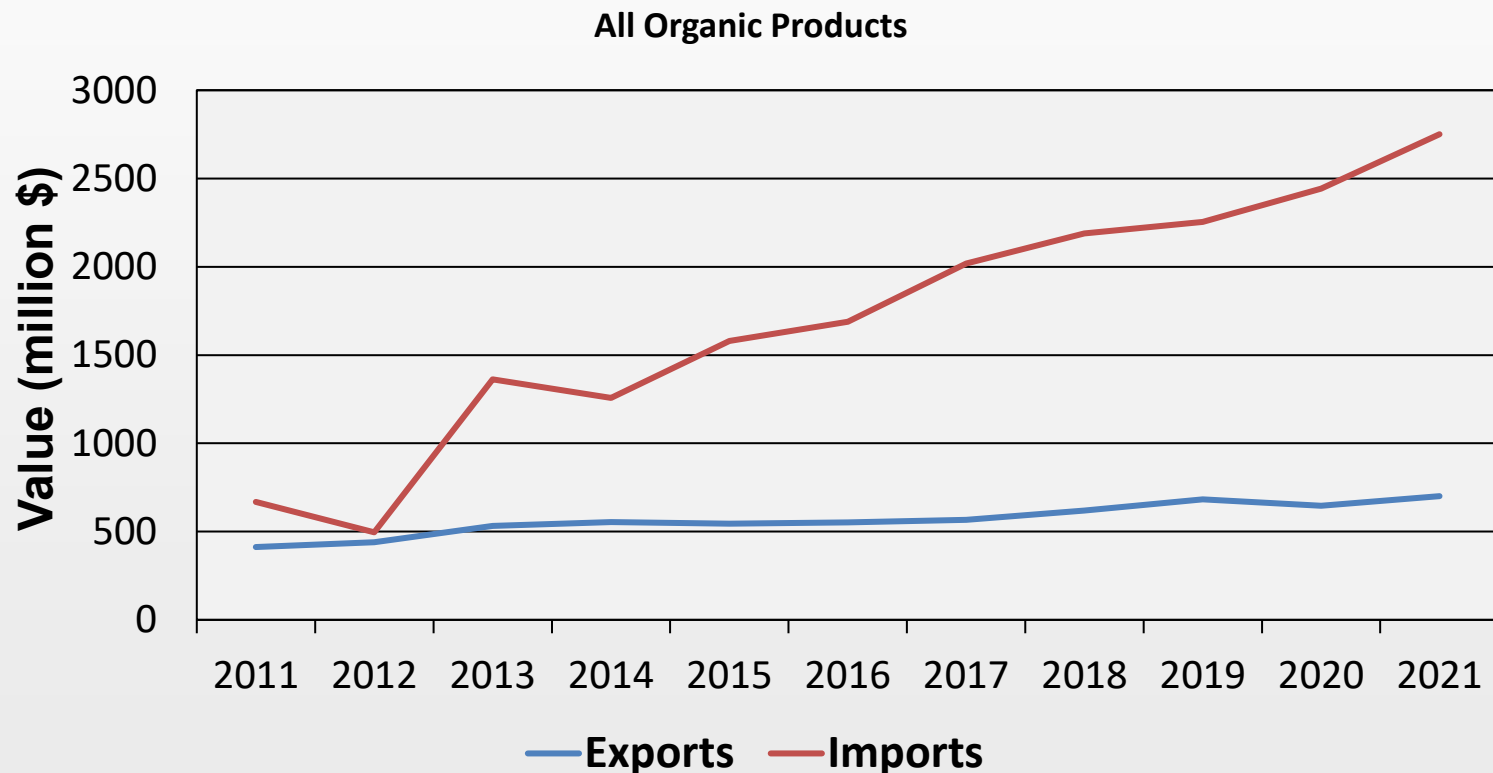
The top 8 organic imported products in 2021 (below) accounted for 84% of all import value. Of these 8, two (coffee, banana) are primarily tropical crops, while two (blueberry, soybean) are major conventional crops in the U.S.

Product	Import Value (\$ million)	
	<u>2021</u>	<u>2020</u>
Coffee	454	449
Banana	323	315
Olive oil	271	278
Blueberry	363	252
Soybean	184	168
Sugar	140	125
Avocado	195	135
Honey	128	75



# 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 \$2 billion in 2021 despite exports rising to a record level.



Source: USDA-FAS GATS



Some highlights from the USDA NASS Organic Producer Surveys are in the following slides. The surveys are not done on a regular schedule. And participation is often quite low, around 60% for WA State. However, they collect data that are not available elsewhere.



## 2019 NASS Organic Survey

	<u>WA</u>	<u>CA</u>
% 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	28.4
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

	<u># farms</u>	<u>Peak animals</u>	<u>% of US</u>
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

		<u>Production</u>	
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



## Organic Certifiers

There are multiple certifiers working with farms and businesses in Washington State. Many only work with handlers or processors. Three certifiers cover virtually all of the organic farmland – WSDA, OTCO, and CCOF. QAI certifies a number of broiler chicken operations in northwest WA.

	<u>WSDA</u>	<u>OTCO</u>	<u>CCOF</u>	<u>Other</u>
# farms cert	853	56	24	16
% farms cert	90	6	2.5	1.7
% acres cert	90.6	7.9	1.5	*

\* No acres available for these farms; most are broiler production with limited area.



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:** Granatstein, D. 2022. Current status of organic agriculture in Washington State: 2021. Organic Trend Series, Center for Sustaining Agriculture and Natural Resources, Washington State University, Wenatchee, WA.