

Current Status of Certified Organic Agriculture in Washington State: 2018

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Photo: C. Miles



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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 2018 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 2018, 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.





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 2017.

The organic market overview for 2017 shows global sales of organic food of US\$97.0 billion, up 8% from the previous year. An early estimate for 2018 global sales is \$106 billion. The U.S. was the largest single country market (\$45.2 billion), followed by Germany (\$11.3 billion), France (\$8.9 billion), and China (\$8.6 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, 2017 - US\$97.0 billion

Leading countries (billion \$):

USA	45.2
Germany	11.3
France	8.9
China	8.6
Canada	3.4

Per capita consumption of organic:

Switzerland	288 €/yr (~6% of food \$)
Denmark	278 €/yr
Sweden	237 €/yr
U.S.	122 €/yr



Source: World of Organic Agriculture



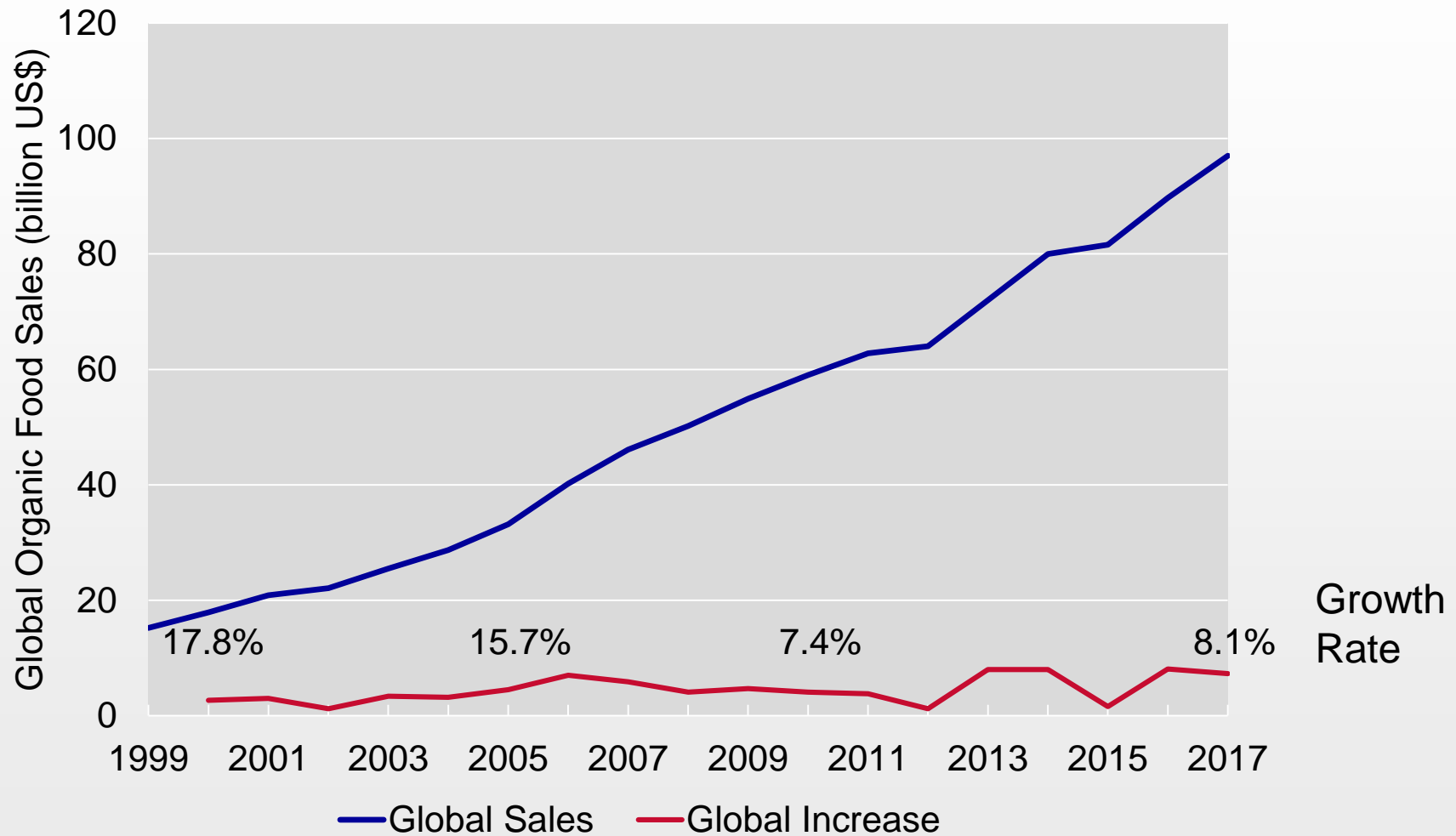
The steady increase in global organic sales (slide 7) has been driven by annual growth rates of 10-20% over the last 15 years. Even during the 2008 recession period, global growth was over 7%. Sales increased by about US\$7.3 billion in 2017 over the previous year.

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.





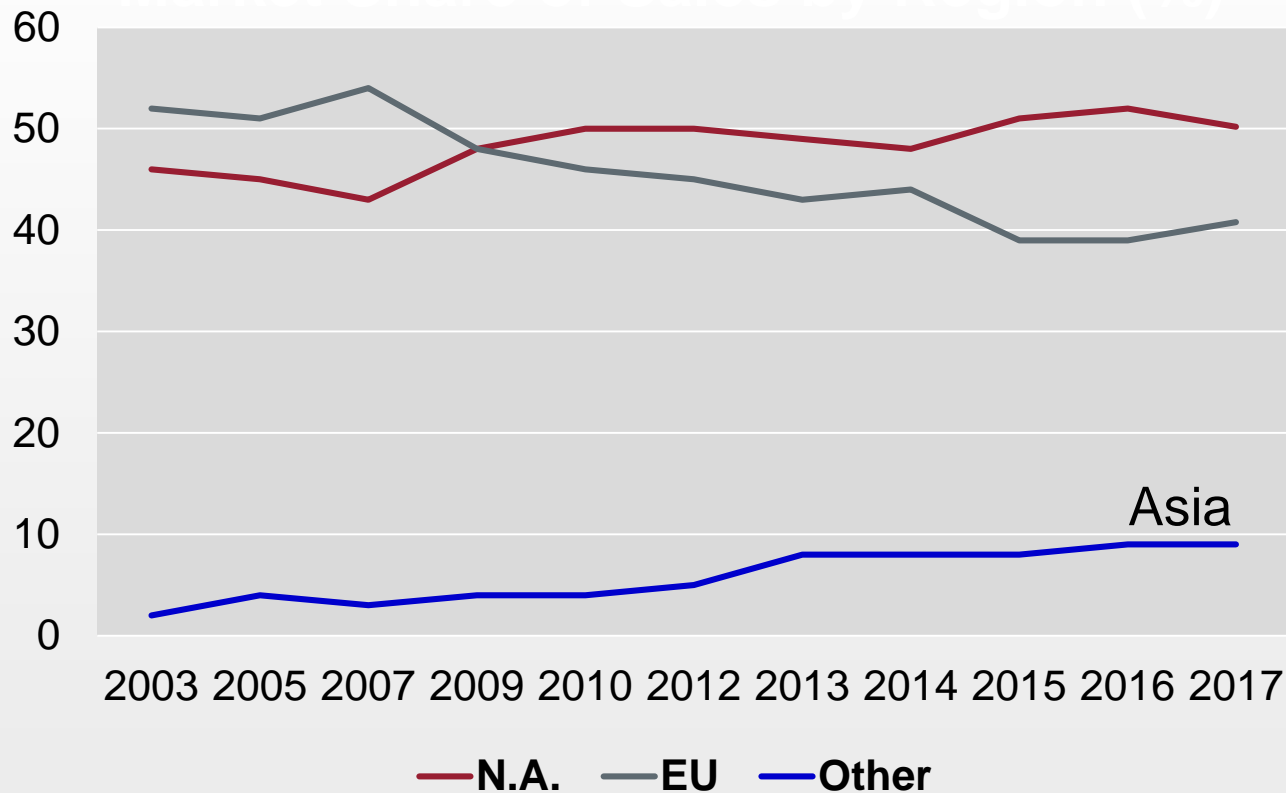
Consumer Demand for Organic Food





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 2017, there were an estimated 172.4 million acres of agricultural land (cropland, permanent grassland, other) under organic management worldwide, up 20% from 2016, and equaling about 1.4% of global agricultural land. Of the organic land, 17% was in arable crops (e.g., grains, vegetables), 7% in permanent crops (e.g., tree fruit, coffee, grapes, olives), and 76% in permanent grassland. North America had 7.9 million ac of organic agricultural land, of which 44% was arable land. From 2011 to 2017, global organic arable land grew from 13.6 million ac to 29.9 million ac (+120%), and permanent crop land grew from 5.9 million ac to 12.1 million ac (+105%). 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	8.1%
Oilseeds	0.5%	Grapes	5.7%
Vegetables	1.1%	Temperate fruit	1.6%



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 slightly in 2018, both in terms of percentage and actual dollars compared with the previous year.

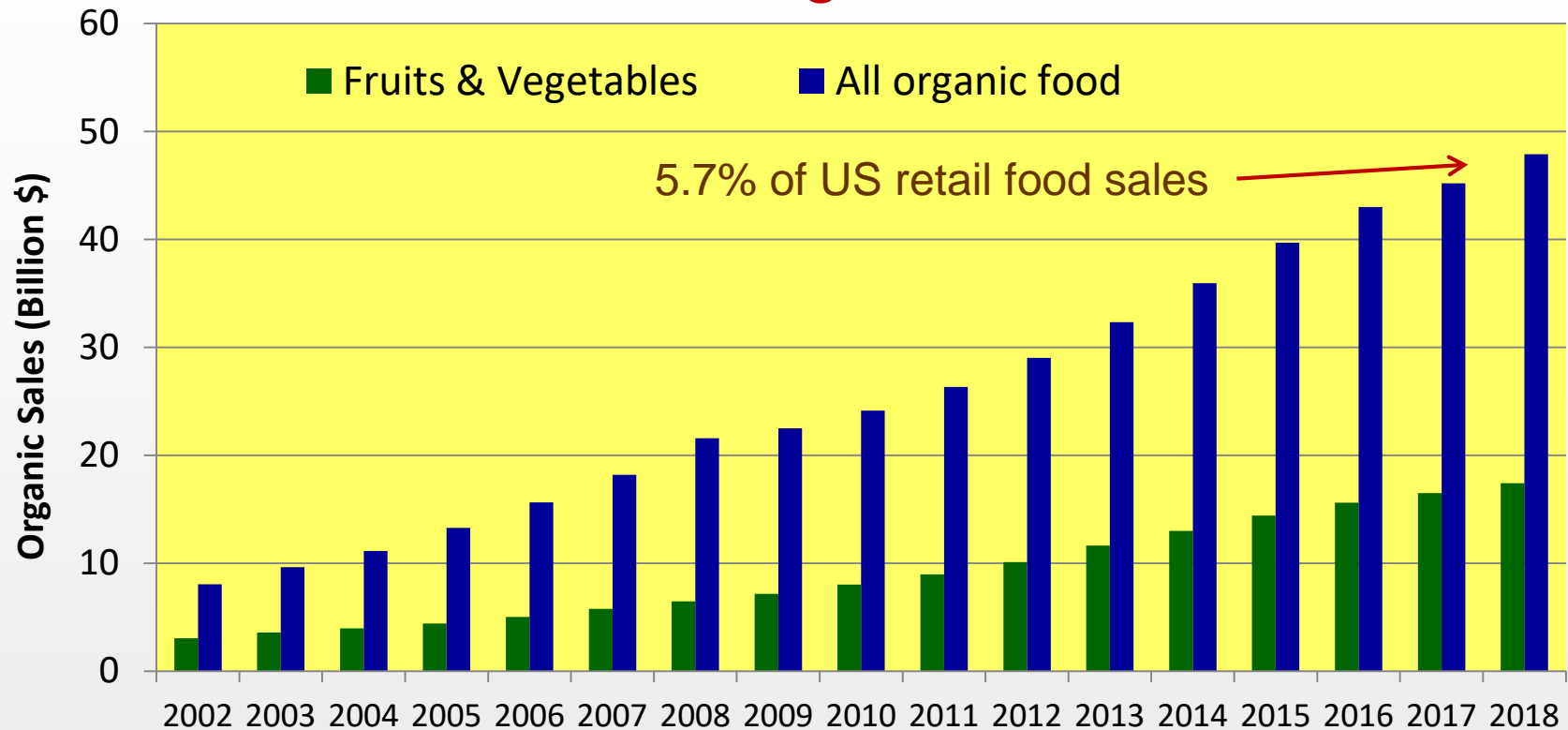
The USDA is increasing its data collection on the organic sector. The Agricultural Marketing Service (AMS), which also houses the National Organic Program, collects data on different crops, livestock and livestock products, market channels, product volume, and price (slide 12). The Economic Research 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 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 **6.0%** in 2018. Organic fruits and vegetable sales increased **5.6%** and were **38%** of all organic food sales (and 14% 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/

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 2018, with certified area up about 11% from 2017 to 2018 (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 declined 38% from 2017 to 2018 after many transition tree fruit acres became certified in 2018.

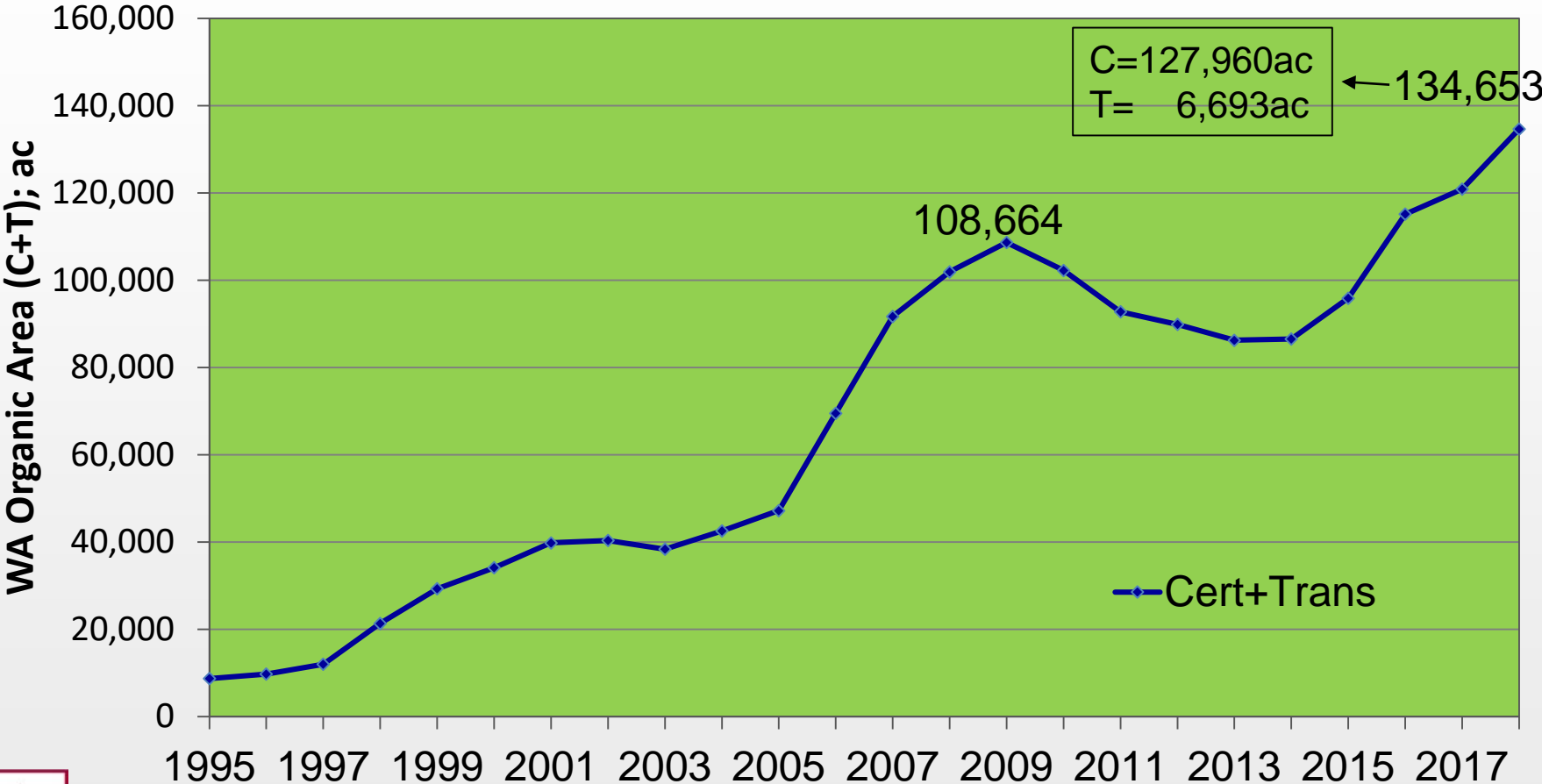
Forages, Vegetables, and Tree Fruit have been the leading crop categories in terms of acres for many years, and Tree Fruit claimed the top spot at 30% of land in 2018 for the first time (slide 16).

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 2005-2018.
WSDA only 1995-2003; additional data added from other certifiers beginning in 2004.





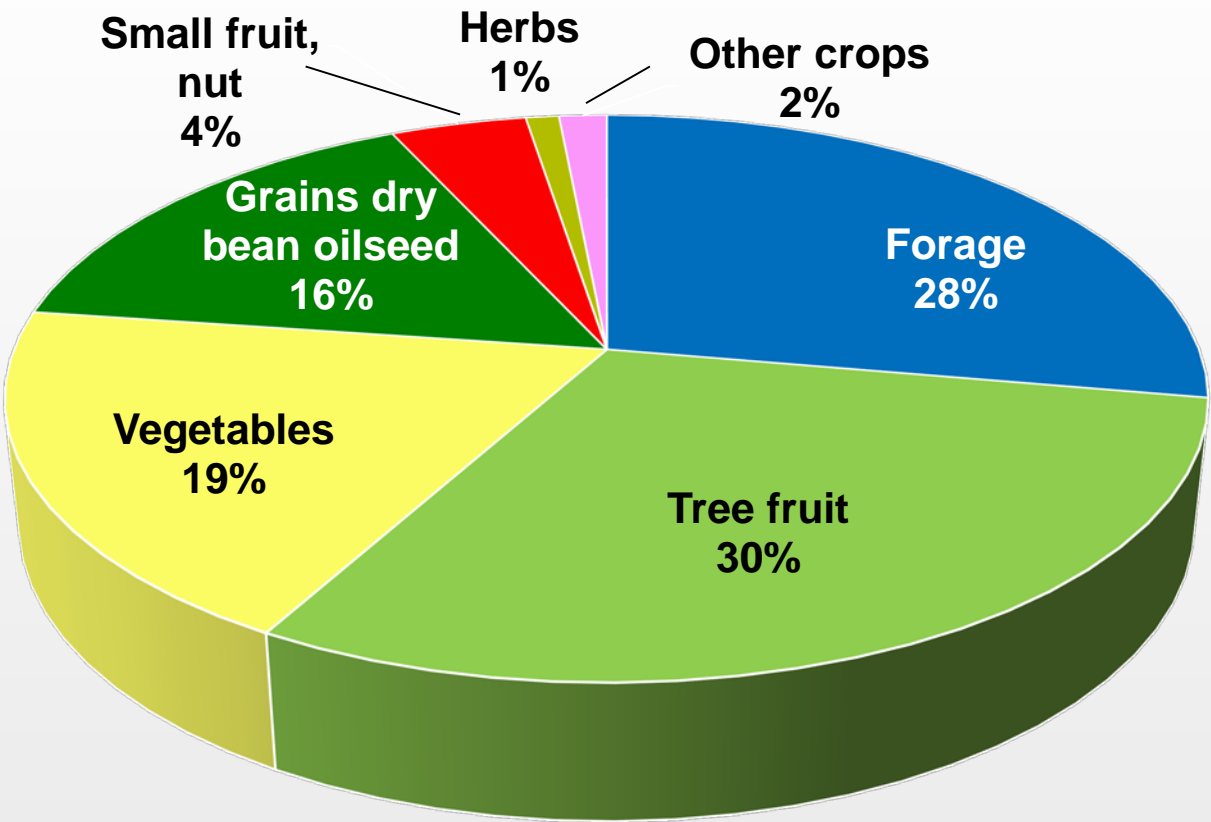
Certified Organic Crop Acres Washington State

	Acres			% Chg 17-18	% of total
	C 2017	C 2018	T 2018		
Forage	33,698	32,974	401	-2.2	27.7
Vegetable	24,282	22,735	79	-6.4	19.1
Tree Fruit	28,624	36,122	4,045	26.1	30.4
Grains/Dry Beans/Oilseeds	14,332	18,913	1	32.0	15.9
Small Fruit, Grapes, Nuts	4,643	5,129	1,247	10.5	4.3
Herbs	1,261	1,254	1	-0.5	1.1
Other crops and land	1,648	1,804	5	9.5	1.5
Undefined land	6,784	0	914	--	--
Total acres (with double crop)	115,263	118,932	--	3.2	--
Total area (site acres)	110,043	127,960	6,693	16.4	--

C=certified; T=transition; % Chg is change in certified acres from 2017 to 2018; % of total is for 2018 certified acres. 2018 combined certifier data includes an estimated 4,206 ac of double crop; 2017 data include estimated 5,083 ac double crop;



Distribution of Certified Organic Acres Washington 2018



Certified crop acres*: 118,932

*includes 4,209 ac double crop

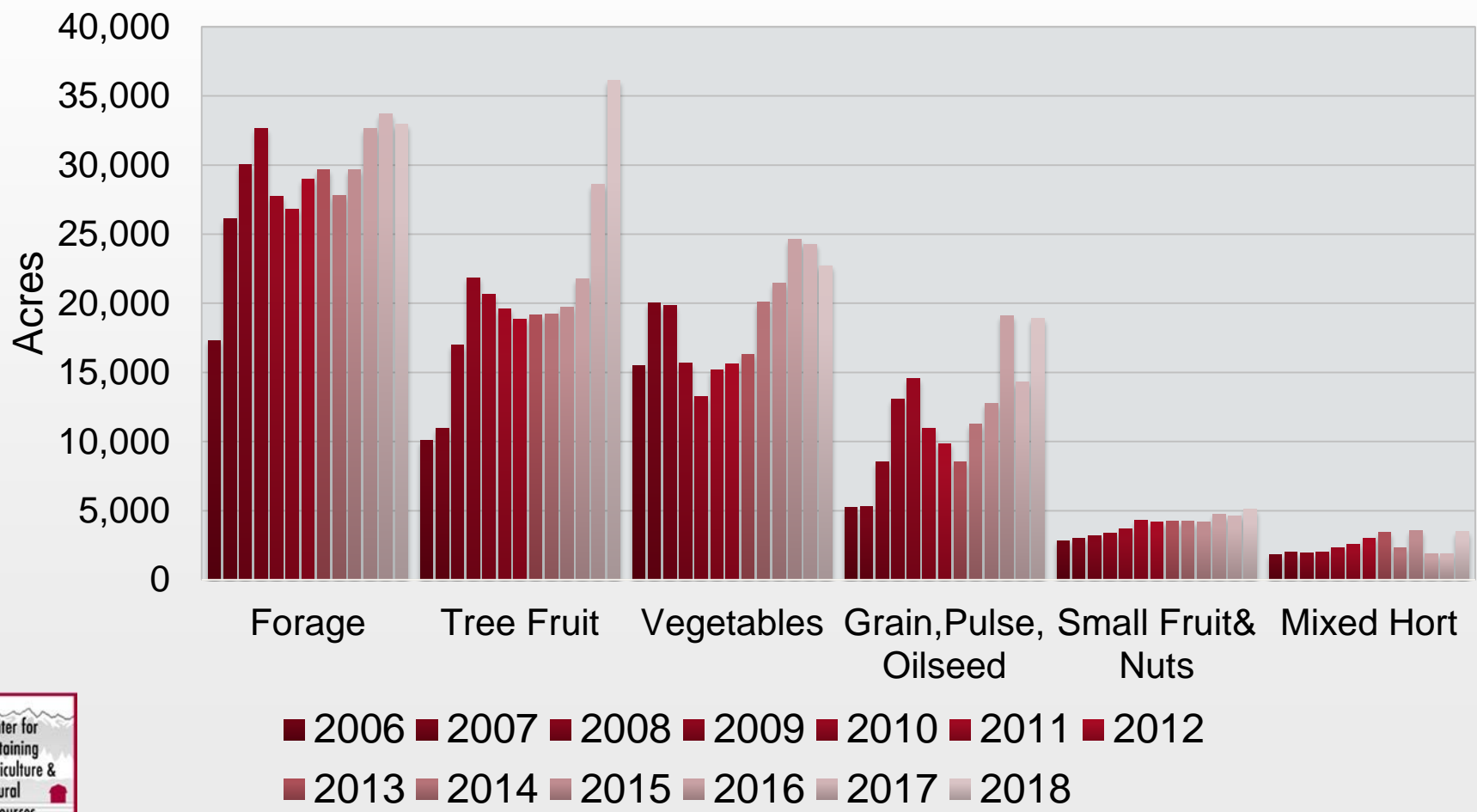
Transition crop acres: 6,693

Total certified site area = **127,960 ac** (e.g.
includes undefined land not tracked as crop)





Distribution of Certified Organic Acres Washington State



Combined certifier data; double crop acres included

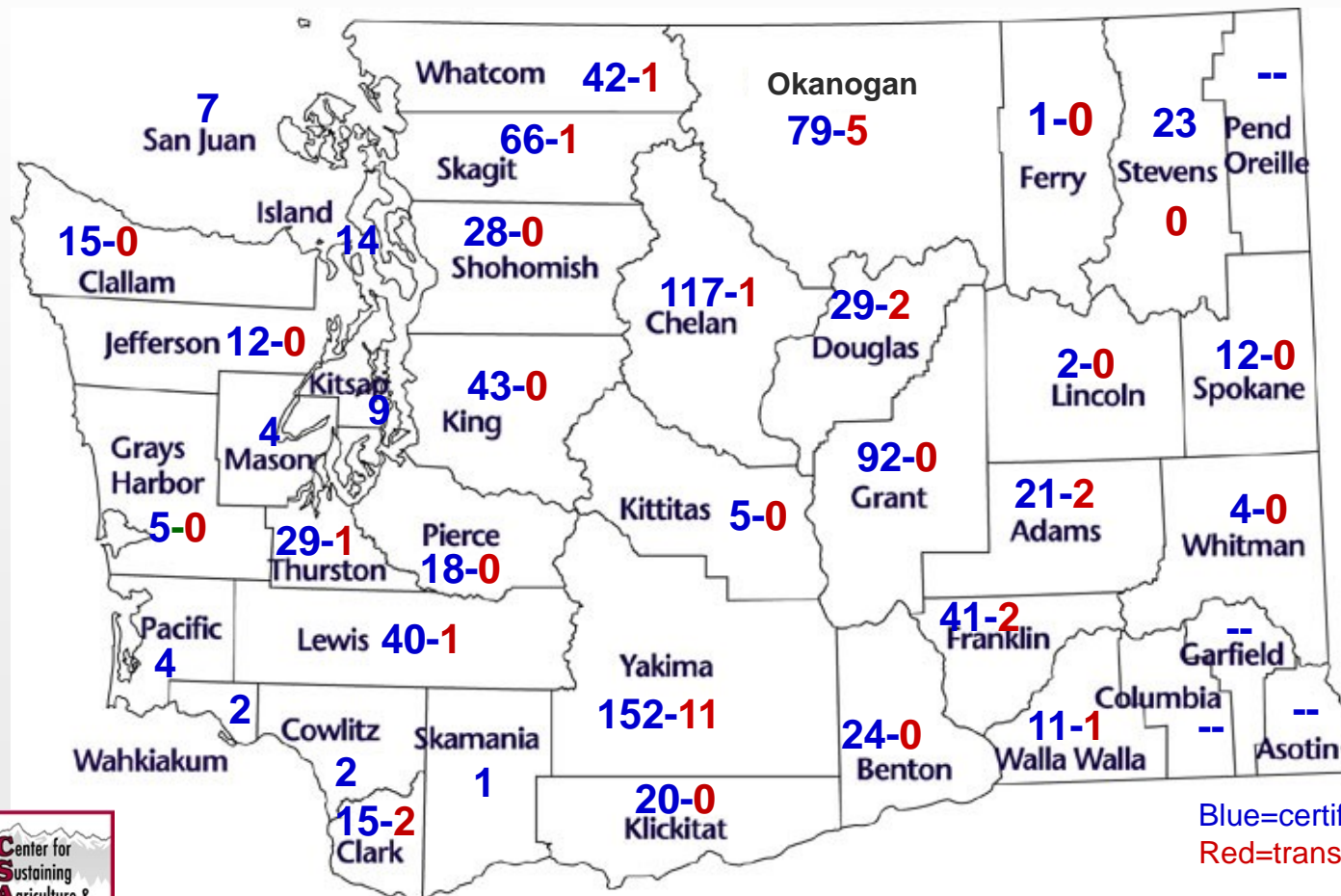


The **spatial distribution** of organic farms in Washington by county is shown by farm number (slide 19) and area (slide 20). Four counties showed no certified farms in 2018. Grant County had the highest number of certified acres, while Yakima had the highest number of certified farms. Statewide, **989** farms were certified organic in 2018, with another **30** farms registered as transition only. Eastern WA counties had **64%** of the certified farms by number and **75%** 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 2018. 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 2018 was on existing certified farms in eastern WA. (slide 23)



2018 Number of Certified Farms by County



Farms
989 certified
30 transition only

Eastern WA
64% of farms

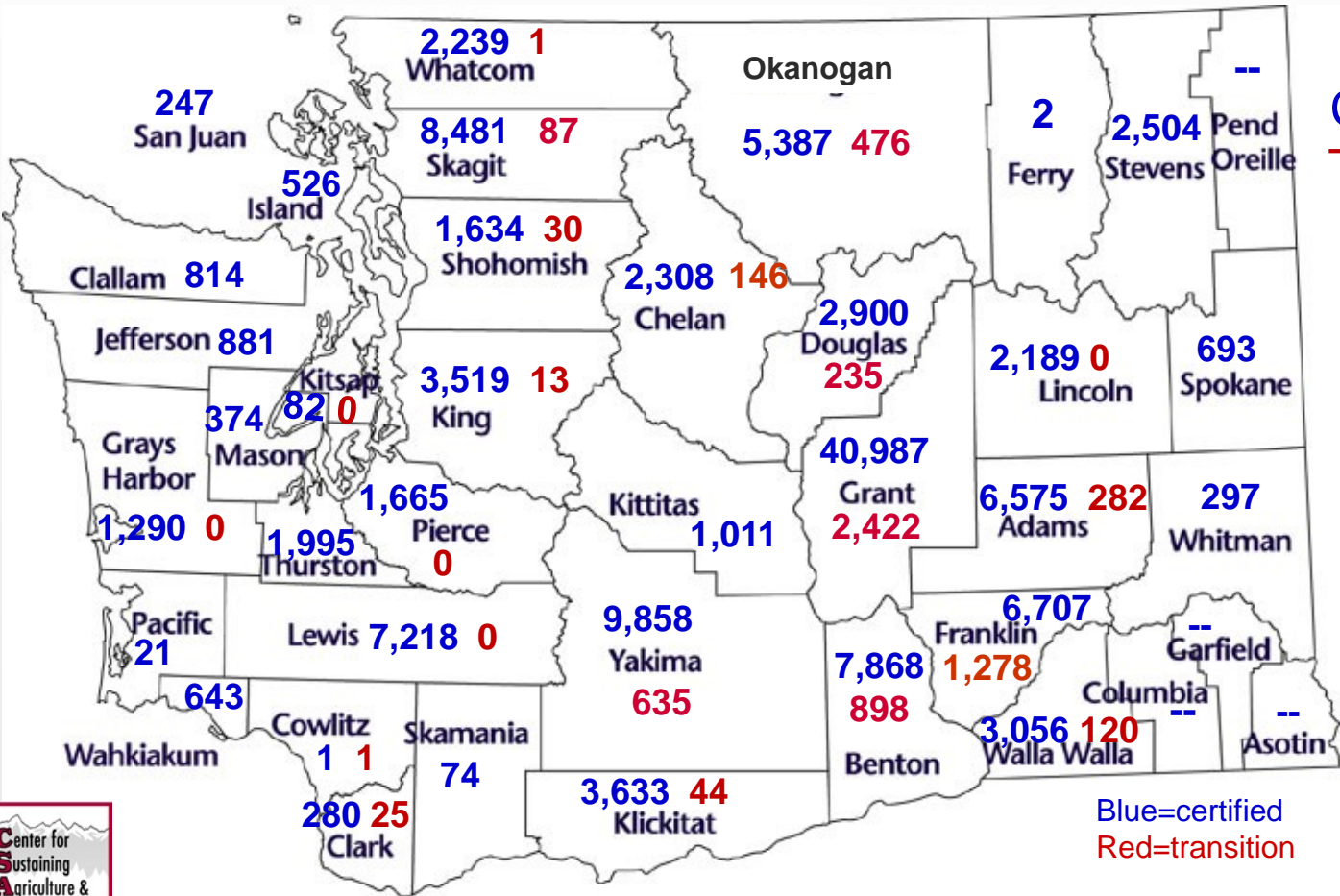
Western WA
36% of farms

Blue=certified producers (primary county)
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



2018 Certified Farm Area by County (acres)



Area*
Cert 127,960 ac
Trans 6,693 ac

Eastern WA
75%
of certified ac

Western WA
25%
of certified ac

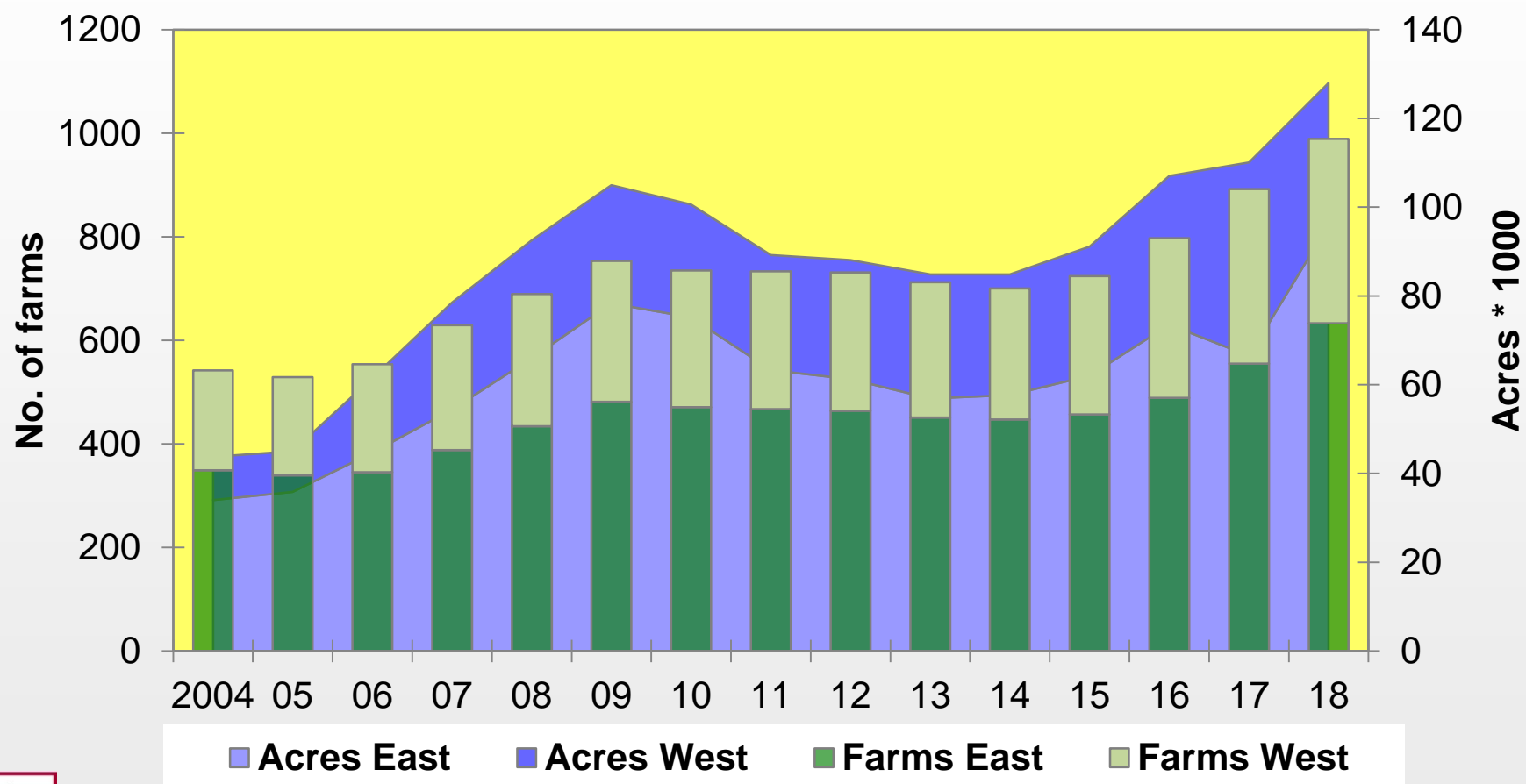
Blue=certified
Red=transition



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. Site 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	2014	2015	2016	2017	2018
Site area	Acres						
Certified	104,962	88,072	84,848	91,088	107,003	110,043	127,960
Transition	3,703	1,817	1,676	4,800	8,153	10,848	6,693
No. of producers ^a	753-10	731-3	700-7	724-22	797-34	892-29	989-30

^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 2018

	East	West	Total
# farms with Transition acres	97	12	109
# farms T only	24	6	30
% that are T only	24.7	50.0	27.5
% T only farms by region	80	20	--
All T acres	6,536	157	6,693
% by region	97.6	2.4	--
T ac on C farms			5,355
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 in 2018 from 2017 as a large area of new tree fruit was certified for the first time in 2017.



The following group of slides shows more detail on several of the major crop categories. In 2018, **organic tree fruit** (slide 25) accounted for 30% of total organic crop acreage, but over 60% of farmgate sales, given its high value per acre. Organic apple acreage expanded dramatically in 2018 as predicted and continued the step-wise pattern of growth seen historically (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 slightly from the previous high in 2017. Sweet corn and green peas, which are often double-cropped, have the largest area. These two organic crops are estimated to account for 7% and 22%, respectively, of all acres of those crops grown in the state.





Organic Tree Fruit Acres Washington State

	--- Certified acres ---								Trans acres†
	2010	2012	2013	2014	2015	2016	2017	2018	2018
Apple	14,790	13,657	14,030	14,052	14,283	16,191	22,116	28,473	3,541
Pear	2,033	1,900	1,820	1,843	2,050	2,243	2,763	3,261	179
Cherry	2,147	1,792	1,850	1,939	2,056	2,078	2,546	3,014	238
Apricot*	299	266	285	299	260	251	216	271	16
Nectarine	550	488	464	440	395	379	357	470	13
Peach	701	618	594	580	553	553	580	580	43
Plum/Prune*	125	89	64	58	56	76	45	49	0
Mixed stone	13	45	22	17	32	--	1	4	14
Total*	20,658	18,855	19,129	19,228	19,685	21,771	28,624	36,122	4,045

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

†only those acres registered with a certifier; 2018 certified value includes a small number of acres pending certification

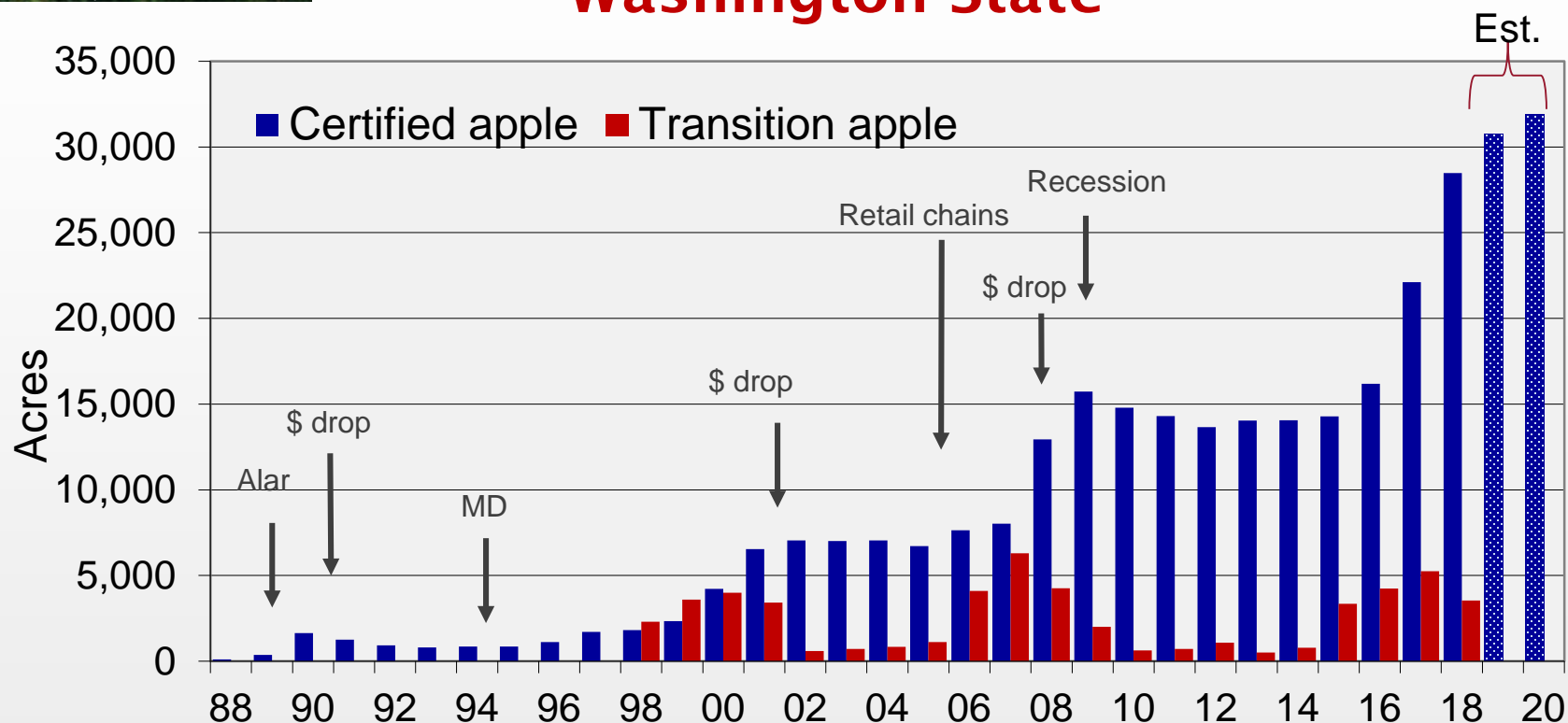
Organic tree fruit accounted for about **14%** of
all tree fruit acres in Washington State in 2018.

Combined certifier data



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)

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).



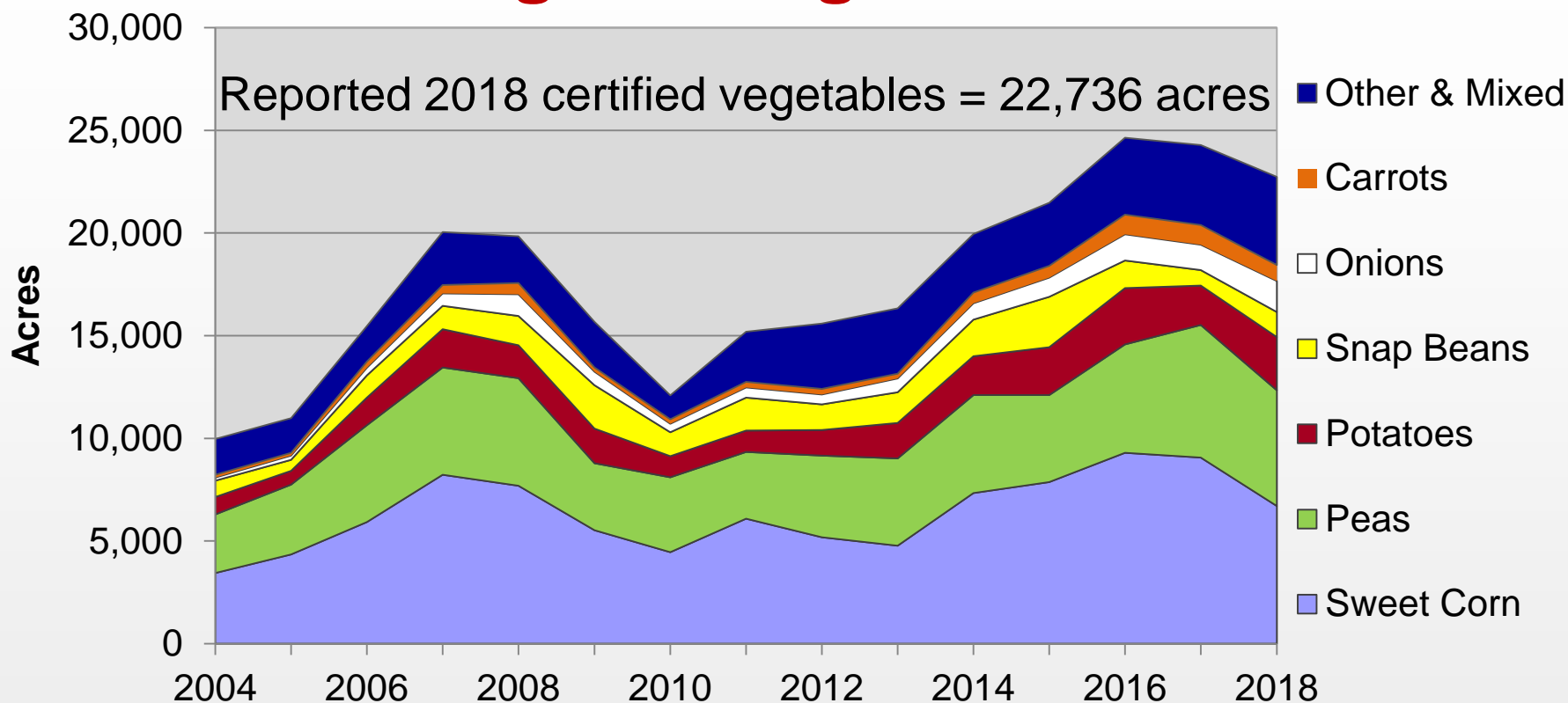


More information on Washington organic tree fruit statistics
is available on-line at:

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



WA Organic Vegetable Acres



Estimated organic acreage share: Sweet corn 7.6%; Peas ~22%;
Onion 6.3%; Snap bean 50.1%

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

Combined certifier data





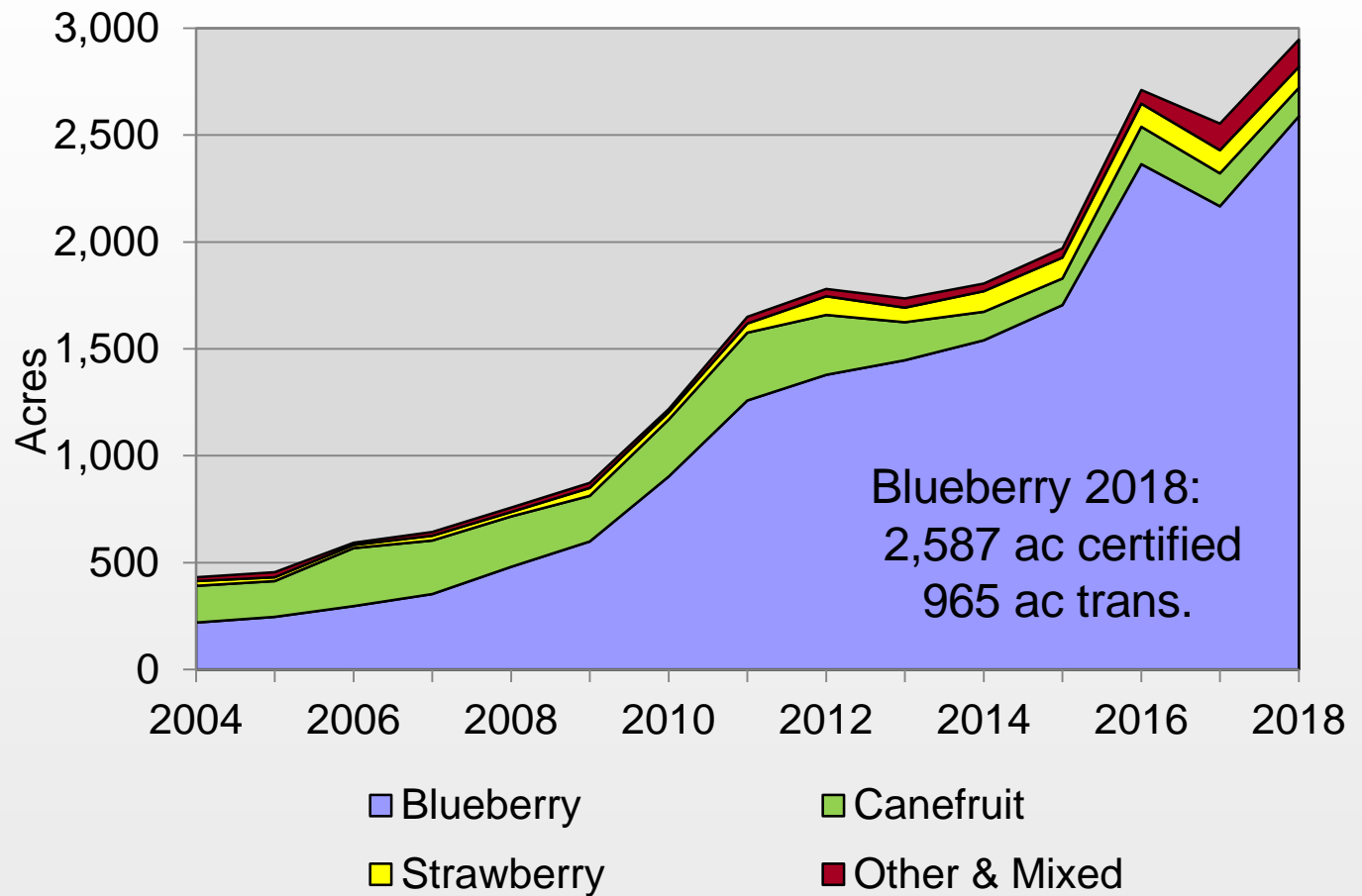
Blueberries account for the largest share of **organic berries** in the state (slide 30). Blueberries in general have experienced tremendous growth in recent years, and much of the growth has occurred in irrigated central Washington as opposed to the traditional western Washington growing area, due to 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](#).





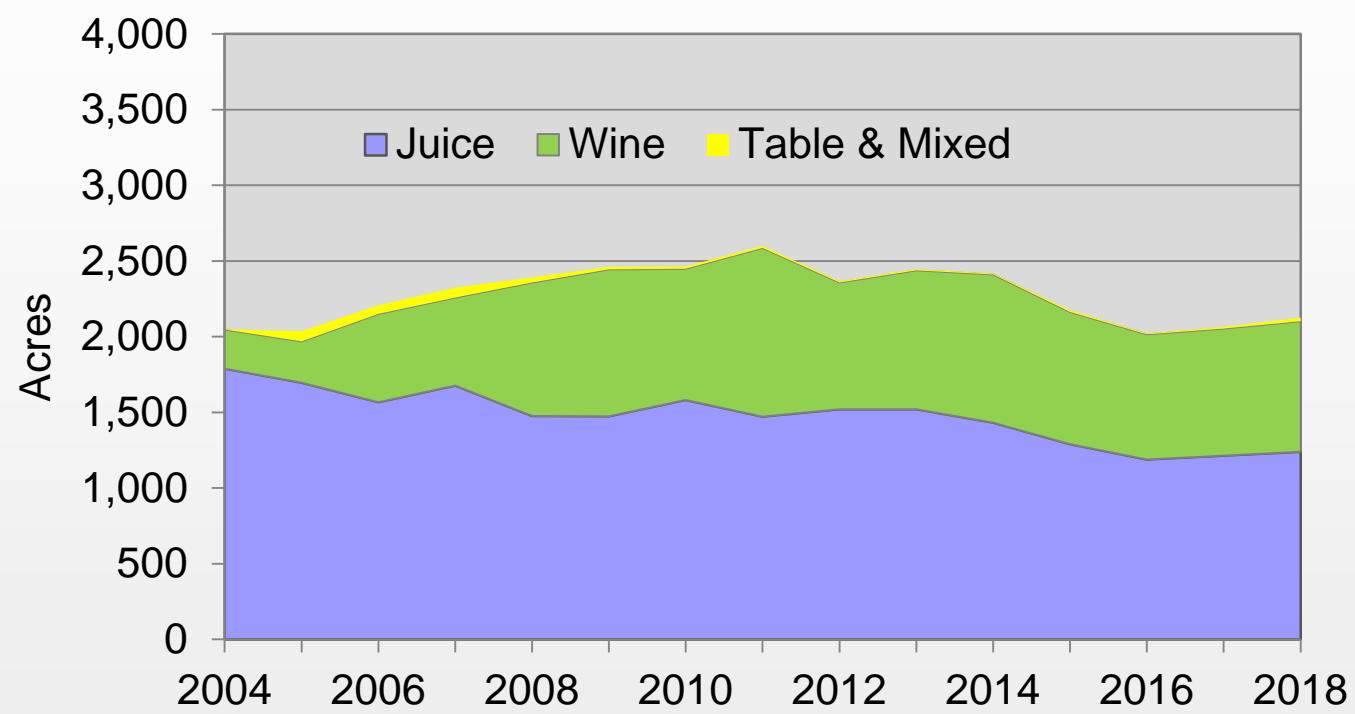
Washington Organic Berry Acres



Organic is ~19% of total WA blueberry acreage (using 13,700 harvested ac state total from NASS 2017).



Washington Organic Grape Acres



Reported 2018 total certified grapes = 2,125 acres
(Concord = 56%)

Estimated organic share of WA grape acreage = 6% of juice
and 1% of wine grapes



M. McCoy



Lopez Island Vineyards





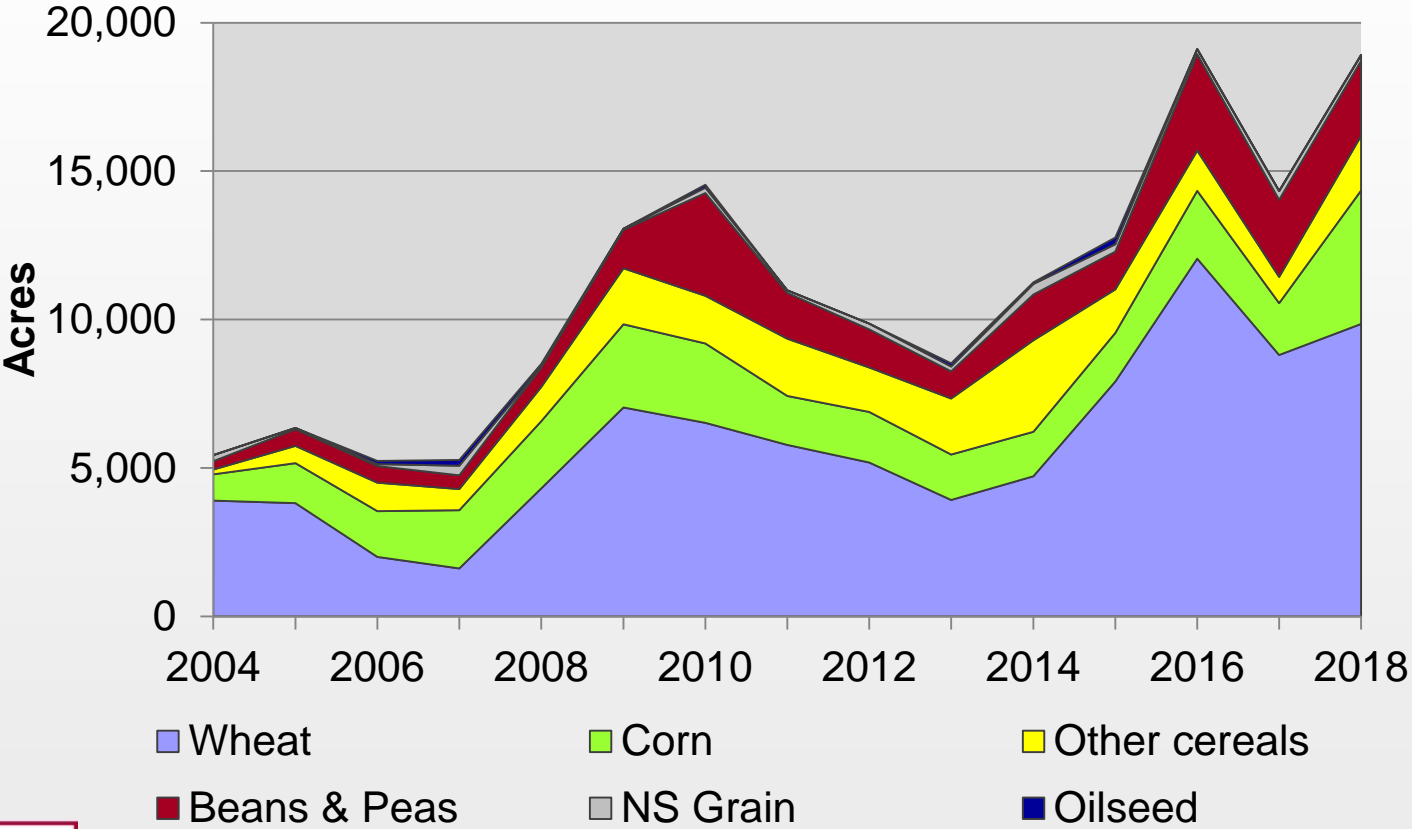
Washington is a major grain producer with extensive wheat production in the dryland regions of eastern Washington. However, it lags behind other states such as Montana and North Dakota for organic wheat production. While demand and prices for **organic grains** are currently high, dryland organic cereal 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, but forage area showed a decline for 2018.





Organic Grain, Pulse & Oilseed Acres Washington State

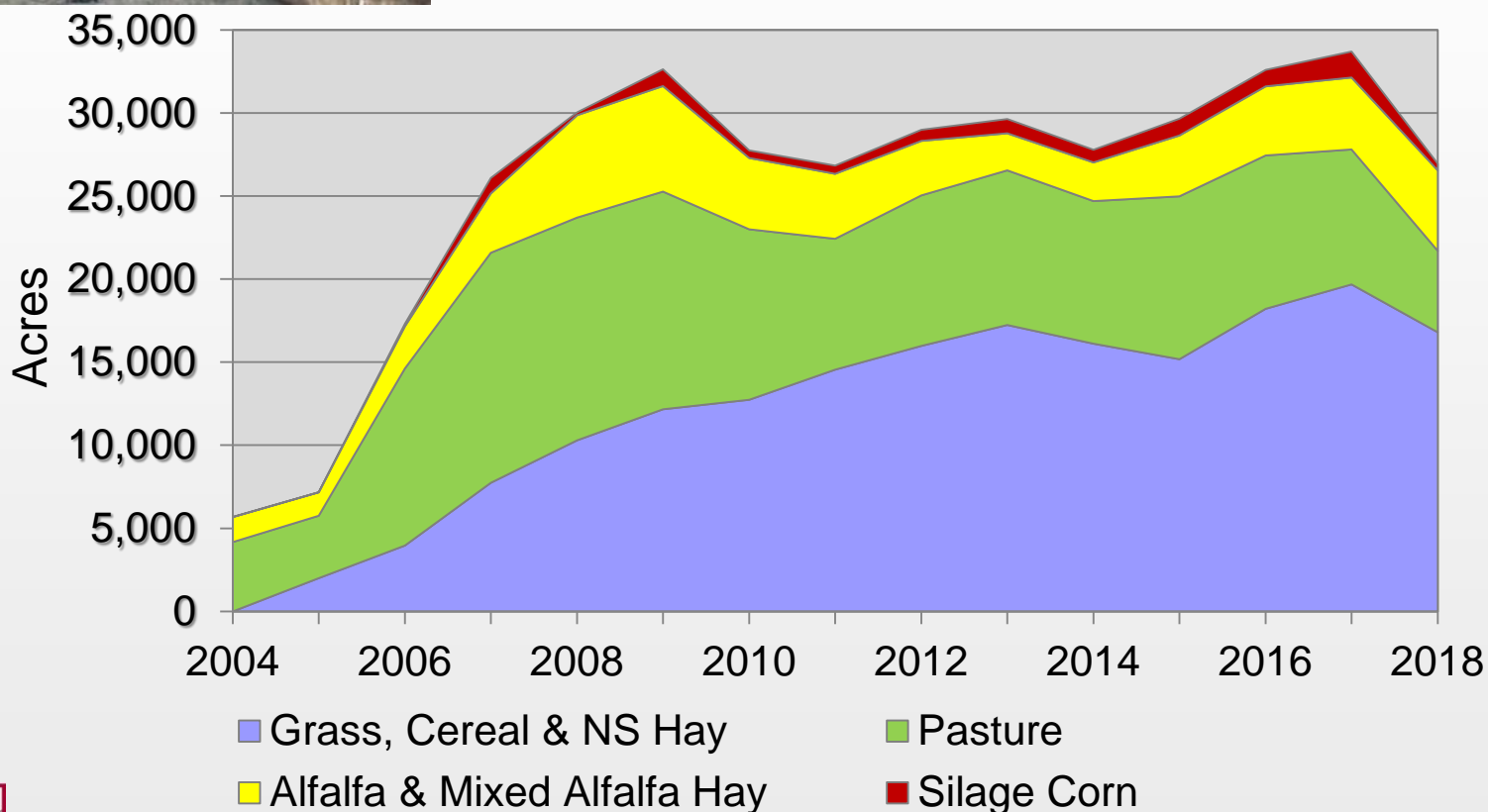


Reported 2018 organic grain, pulse and oilseed = 18, 913 acres





Organic Forage Acres Washington State



Reported 2018 WA organic forage total = 32,974 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 2.9% of the state dairy herd in 2018.

There were 50 certified cow dairies in 2018, and 1 certified goat dairy. At 16,445, the total number of organic dairy stock was similar to 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. Statewide average monthly production declined slightly in 2018.





Estimated Organic Dairy Cows Washington State

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

There was also 1 certified organic goat dairy in 2018



Photo: Organic Valley

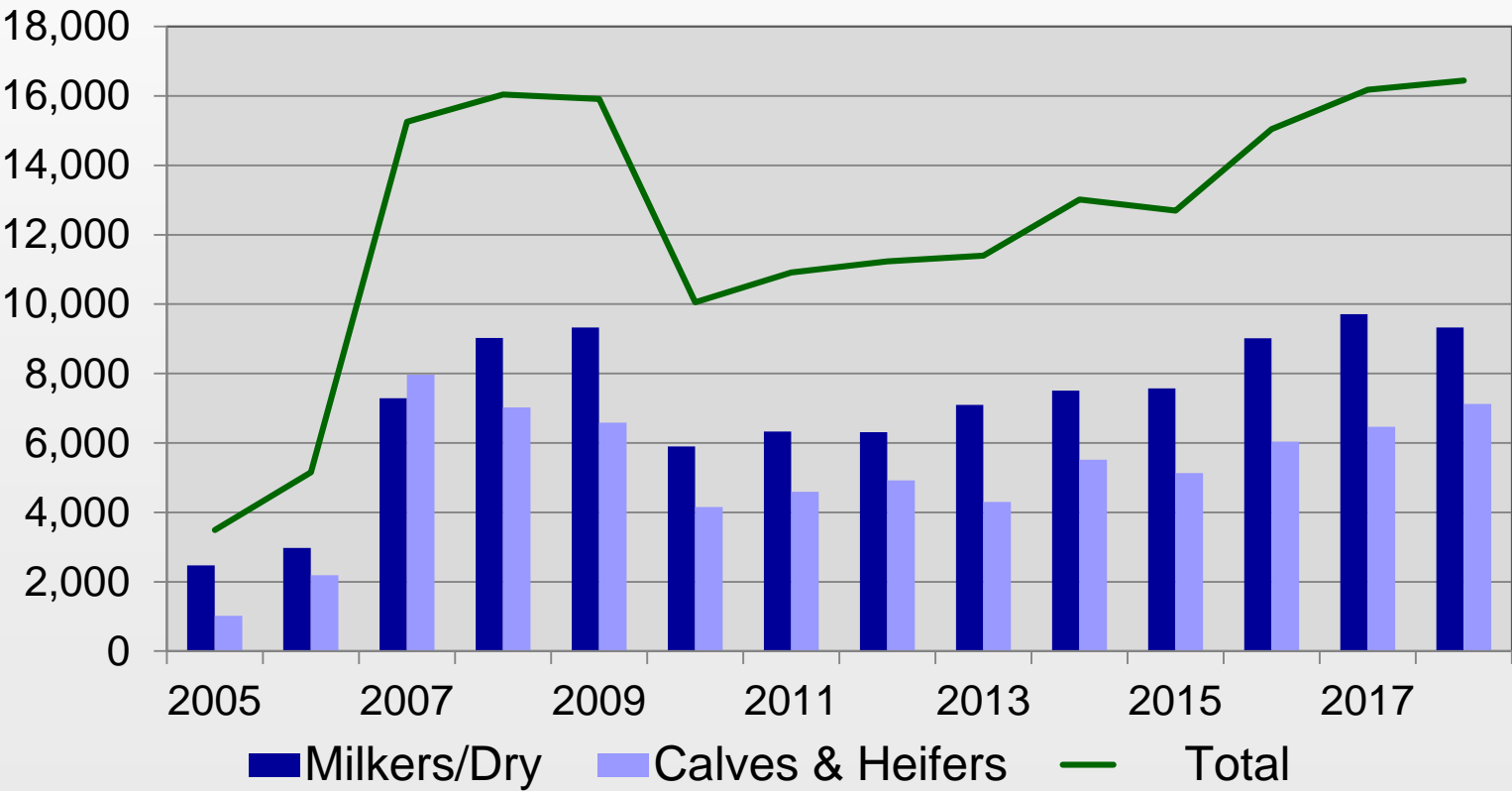
Organic dairy cows represented 3.7% (2008) and 2.9% (2018) of state milk herd**

*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





Organic Dairy Sector Washington State

Trends - 2012 to 2018 2016

No. of certified cow dairies	+47%
No. of milkers/dry cows	+48%
No. of calves & replacements	+45%



	<u>2011</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>
No. of dairies pending	1	6	0	0	0
No. of milk cows in transition	150	>506	0	0	0
Ave. lb milk per cow per month*	1,187	1,638	1,590	1,455	1,476
Est. statewide monthly production (million lb milk)	6.91	10.93	11.77	12.61	12.07

*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 81% of farmgate sales coming from 75% of certified acres (slide 43). Total sales grew 17% in 2018, led by an 84% increase western WA. Leading organic sales were Grant County (\$171 million) in eastern Washington and Pierce County (\$34 million) in western Washington (slides 44 and 45). 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. Fifteen counties experienced sales declines of greater than 10%, while sales grew more than 10% in 10 counties. Based on WSDA data only, 92% of farm sales came from crop production versus 8% from livestock.

The distribution of organic sales (WSDA-certified only) by farm economic class shows that 40% 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 (24% of farms) accounted for 82% of organic sales in 2018 (slide 47).

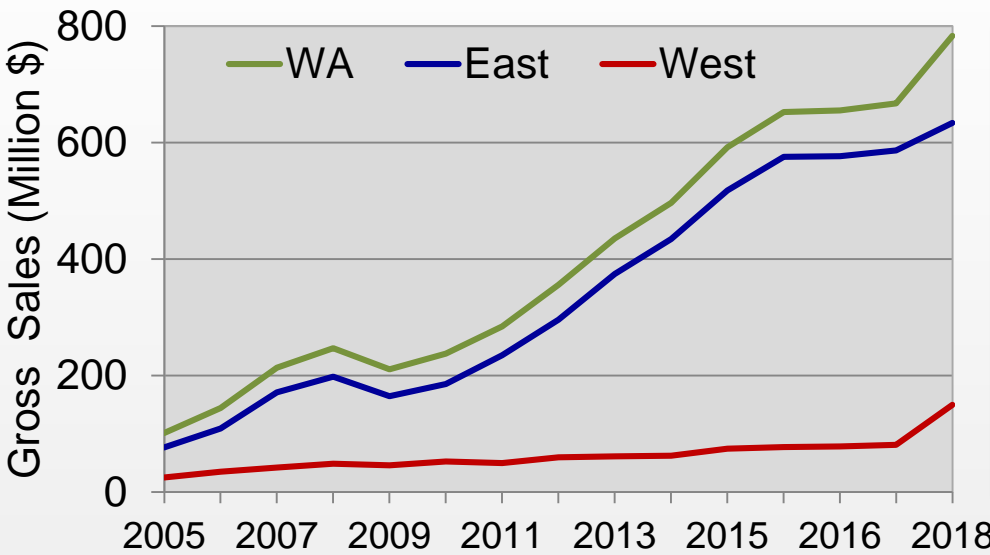




Trend of Farmgate Sales Value

Cert. Organic Crop and Animal Products

Washington State Producers



-----2018-----				
	Million \$	% +/- 2017-18	% of \$	% of acres
East	634	8	81	75
West	149	84	19	25
Total	783	17	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.





2018 Farmgate Sales

Certified organic crop & animal products

Eastern WA county estimates



Photo: WSU Small Farms Program

	\$ Million
Grant	171.5 ↓
Yakima	104.3 ↑
Benton	56.0 ↓
Adams	70.3 ↑
Okanogan	47.2 ↓
Walla Walla	38.9 ↓
Franklin	48.4 ↑
Chelan	34.9 ↑
Douglas	18.3 ↓

	\$ Million
Klickitat	7.3 ↓
Stevens	1.3 ↑
Whitman	0.1 ↓
Spokane	0.1 ↓
Ferry, Kittitas & Lincoln 2018 sales not disclosed to protect confidentiality.	

\$634 MIL total East

81% of state sales

\$783 MIL total WA

Arrow indicates direction of sales change from previous year

Yakima Co. up 46%; Douglas Co. down 25%, Walla Walla Co. down 22% compared to 2017

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





2018 Farmgate Sales

Certified organic crop & animal products

Western WA county estimates



	\$ Million
Skagit*	23.9 ↓
Lewis	9.4 ↓
King	8.4 ↓
Thurston*	11.8 ↑
Whatcom*	8.2 ↑
Snohomish	18.7 ↑
Pierce	34.7 ↑
Jefferson	2.3
Clallam	1.4 ↓

	\$ Million
Clark	2.2 ↑
Kitsap	0.7
Island	0.7 ↑
San Juan	0.8 ↑
Grays Harbor, Mason, Skamania & Wahkiakum not disclosed, to protect confidentiality.	

\$149 MIL total West
19% of state sales
\$783 MIL total WA

San Juan Co. up 93% compared to 2017

*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	2018	2006	2010	2015	2018
<25K \$	38	31	21	20	1	1	0.2	0.3
25-100K \$	24	22	21	20	5	3	1	1
100-250K \$	15	17	14	15	10	8	2	2
250K-1MM \$	17	21	21	26	33	32	11	14
>1MM \$	6	9	24	20	51	56	85	82



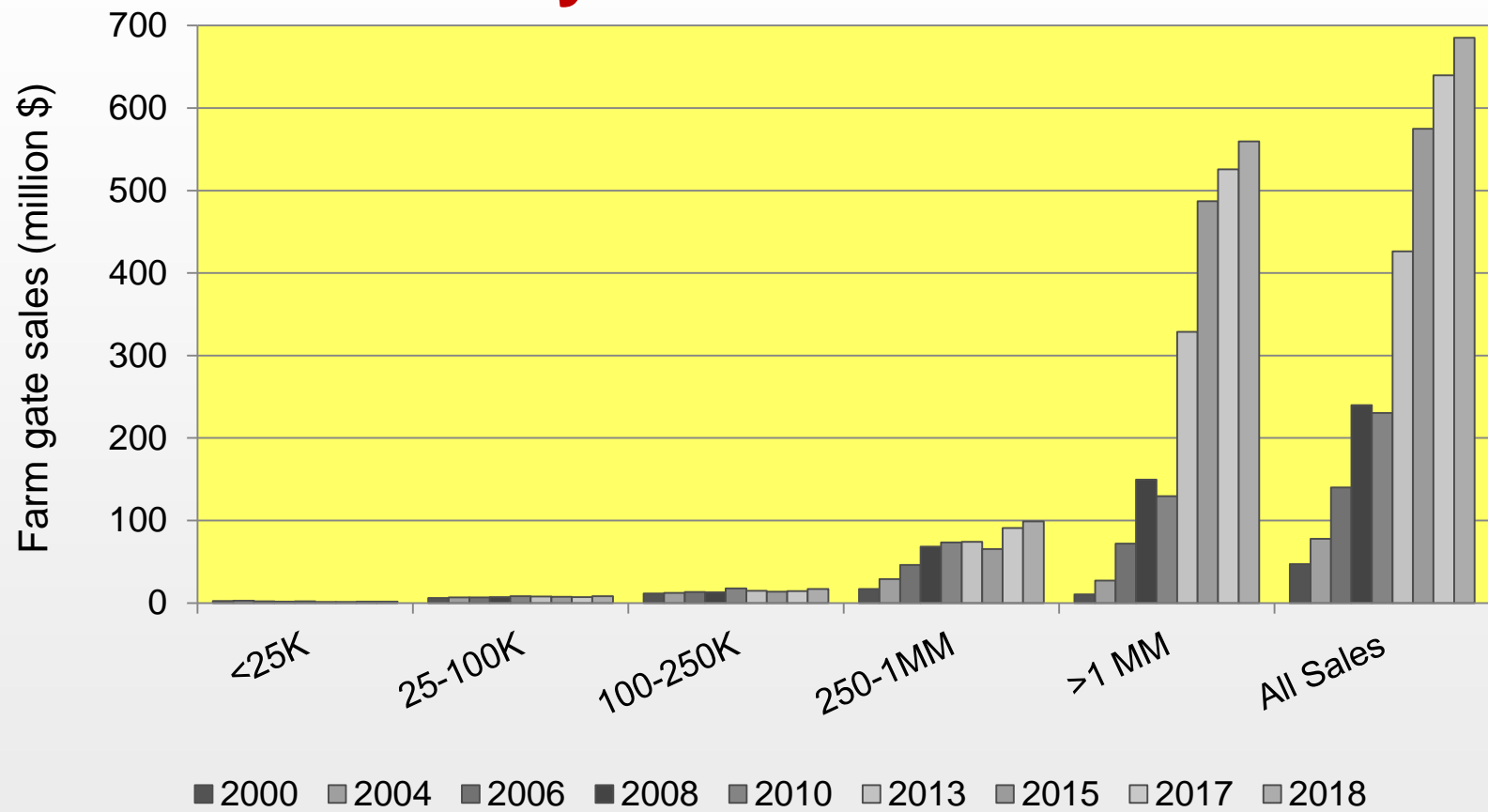
Photo: WSU Small Farms

***WSDA certified farms only.** Gross farmgate sales in dollars. 726 farms reported sales for 2018. 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*



Farm size class by gross annual sales

*WSDA farms only. Gross farmgate sales in dollars. 726 farms reported sales in 2018. Sales do not include values from new applicants or farms that did not reapply during reporting year.





Estimated Certified Organic Share of Washington Agriculture

No. farms
(2017 base data) 2.8%

Cropland
(2017 base data) 1.7%

Value
(NASS 2017 data) 7.8%

If organic ag was considered a single commodity, it would rank no. 4 among all Washington commodities for dollar value in 2018 (after apples, milk, and wheat).

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



Alvarez Farm produce: C. Donovan



Organic Trade

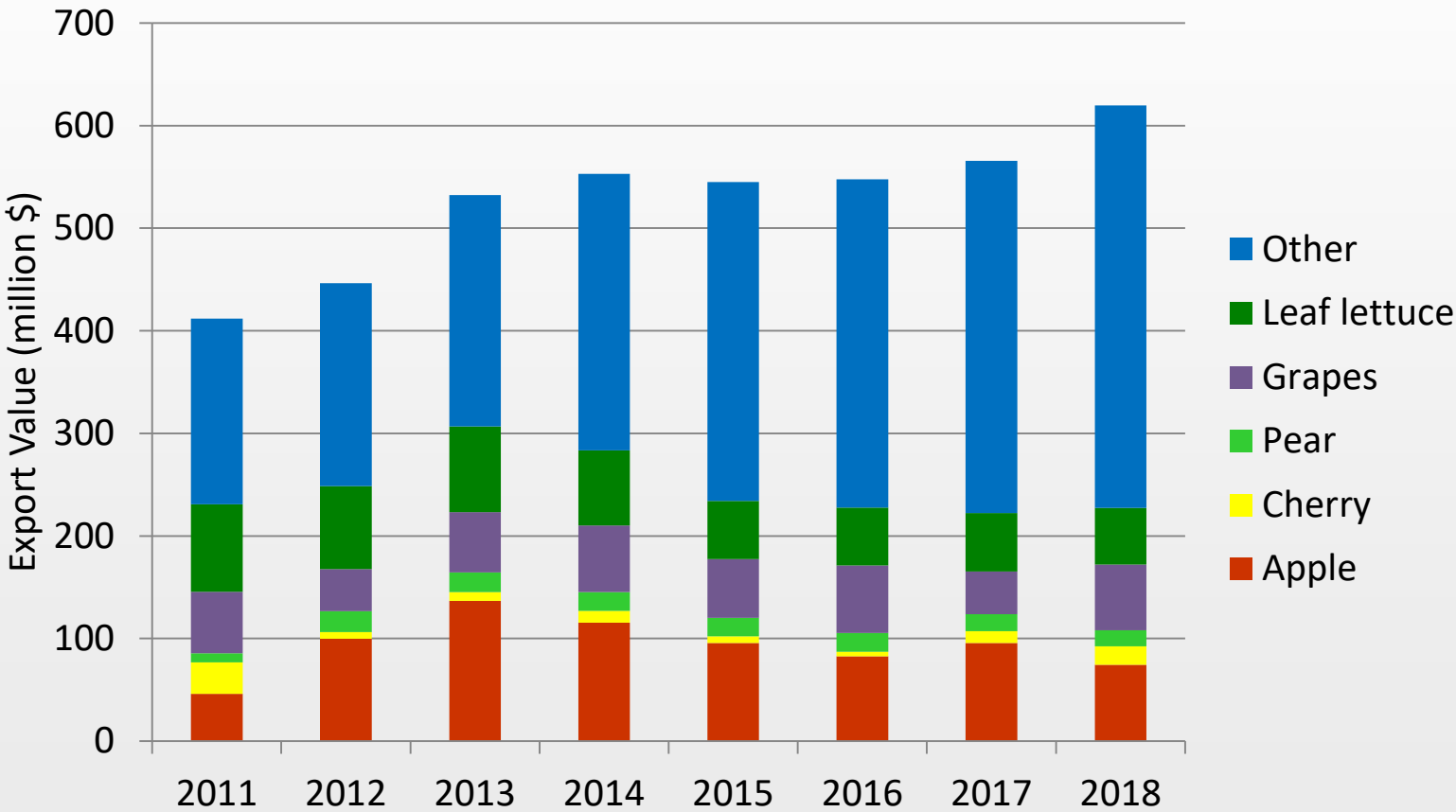
Many organic products are actively exported and imported among countries. Certain products, such as coffee and bananas that are tropical, account for significant shares of organic imports in the main North American and European markets. Estimates of U.S. organic exports and imports have been made by the USDA Foreign Agricultural Service. Apples have consistently been one of the leading organic exports by value (slide 50); 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 51). The estimated \$74 million of organic apple exports in 2018 is diminished by the \$57 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 52.





U.S. Organic Exports

Apples (\$74 mil) were the leading U.S. organic produce export in 2018, followed by grapes (\$64 mil) and leaf lettuce (\$55 mil).





U.S. Organic Imports

The top 8 organic imported products in 2018 (below) accounted for 72% 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.

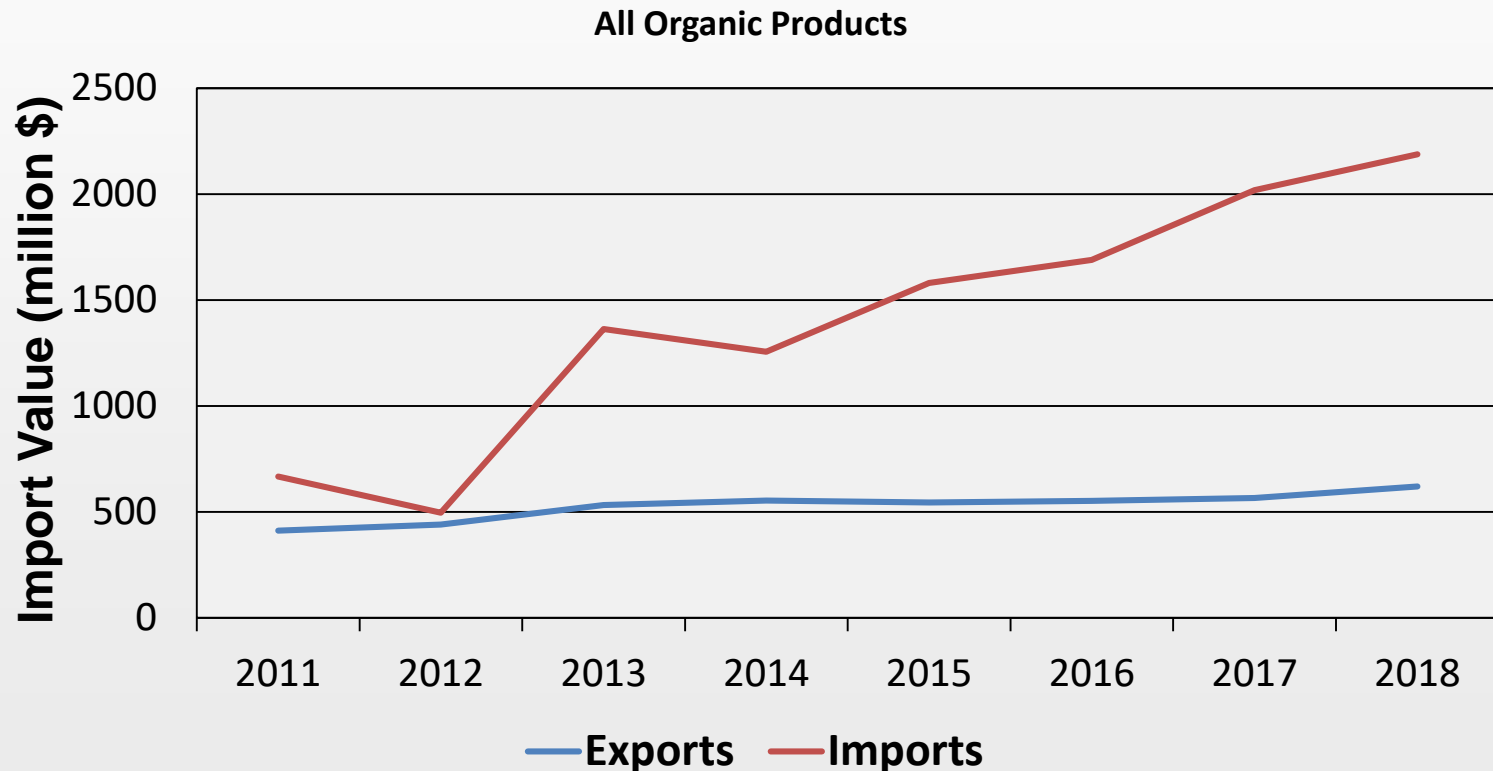
Product	Import Value (\$ million)
Coffee	339
Olive oil	311
Banana	310
Soybean	203
Blueberry	129
Avocado	125
Honey	79
Corn	74

Source: USDA-FAS GATS



U.S. Organic Trade

Value of U.S. organic imports has exceeded organic exports for the past 8 years. The “organic deficit” reached a record \$1.5 billion in 2018.





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 E. Kirby. 2019. Current status of organic agriculture in Washington State: 2018. Organic Trend Series, Center for Sustaining Agriculture and Natural Resources, Washington State University, Wenatchee, WA.