

Current Status of Organic Agriculture in Washington State

2009

Revised Feb., 2010



Photo courtesy of WSU Small Farms Program

Elizabeth Kirby and David Granatstein

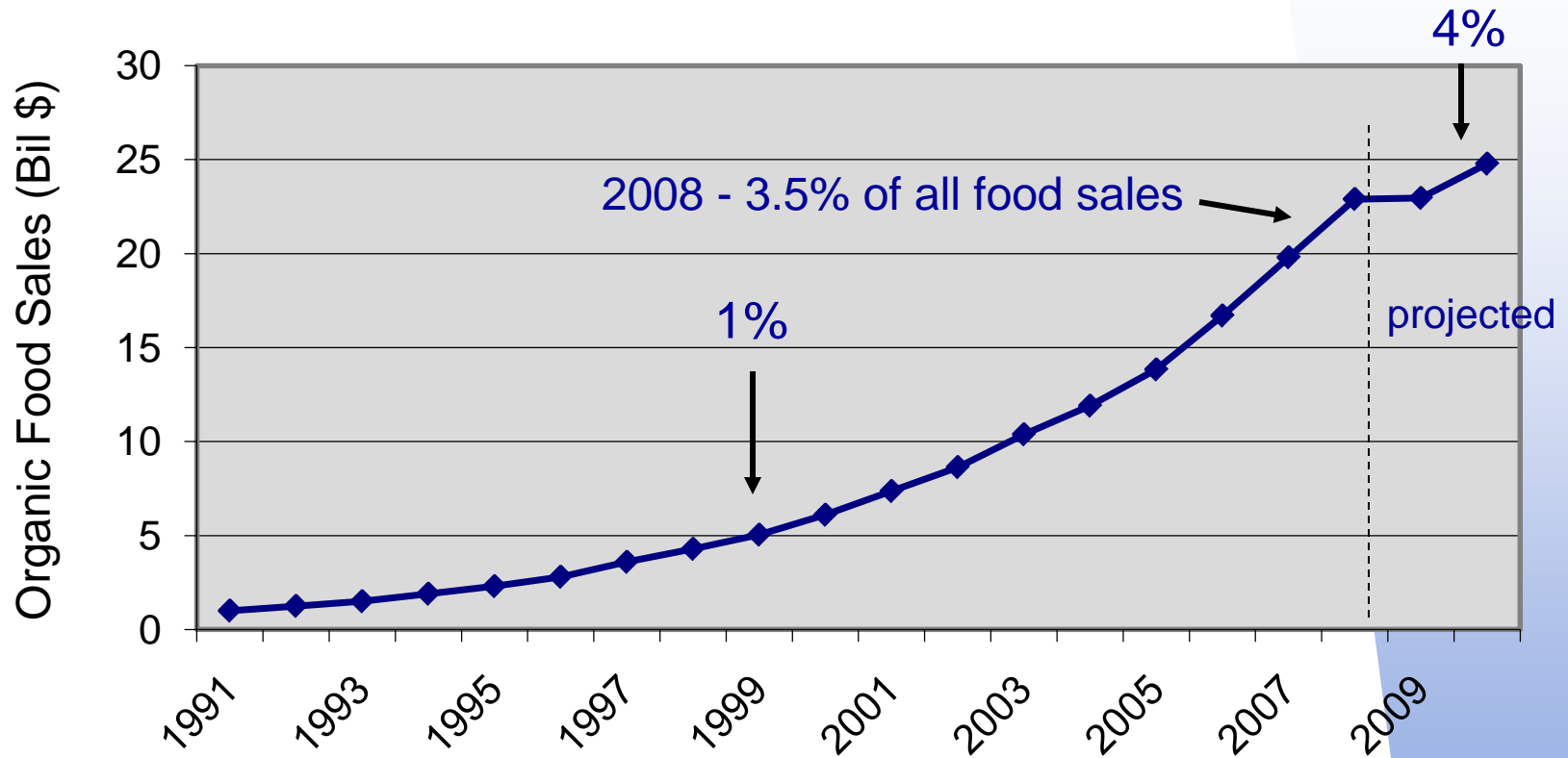
***WSU-Center for Sustaining Agriculture
and Natural Resources***



In cooperation with the Washington State Department of Agriculture
Organic Food Program and Oregon Tilth Certified Organic

Consumer Demand

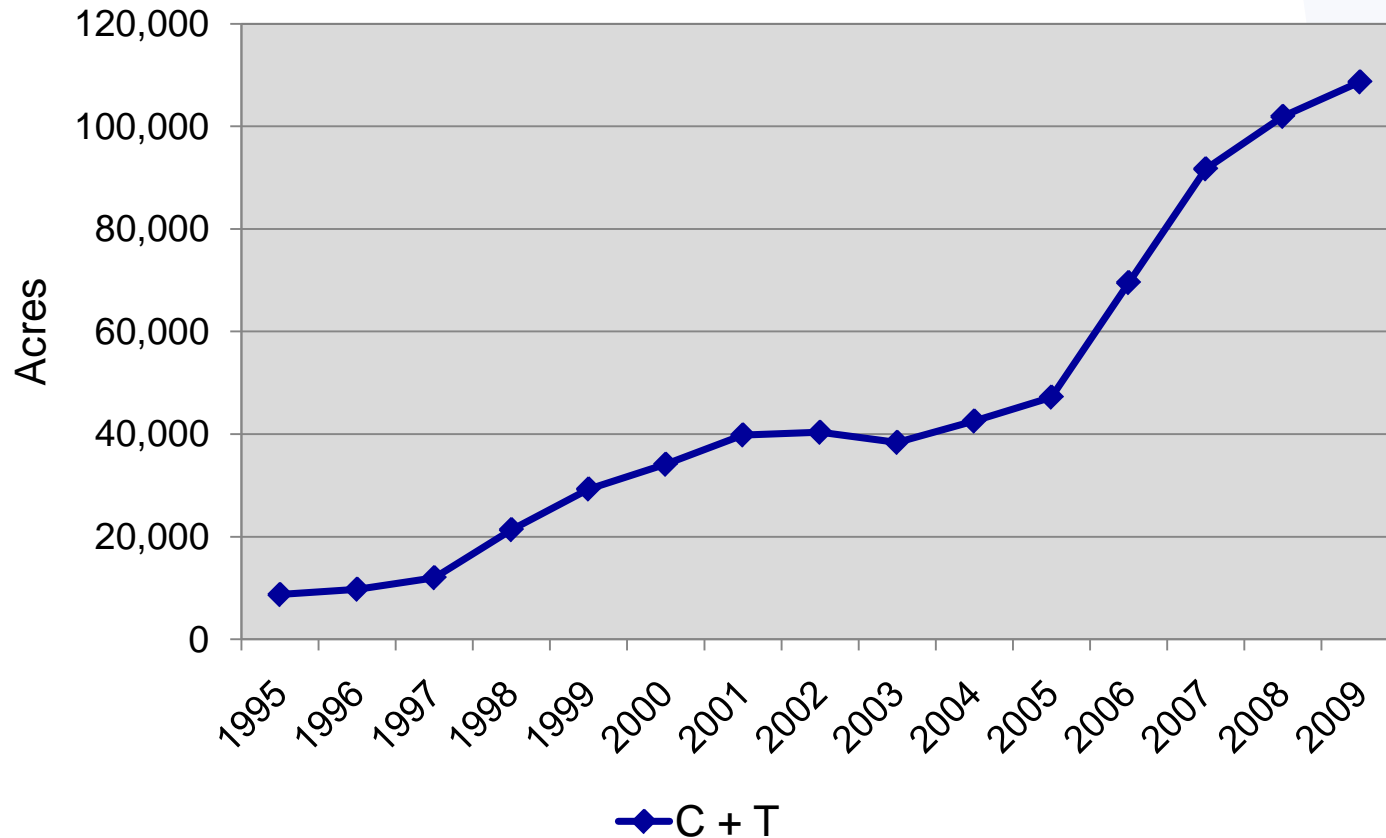
Growth of US Organic Food Sales



Fruits & vegetables = 37% of sales



Certified Organic Farm Area Washington State



*Certified (C) + Transition (T); includes all land area but no double crop 2005-09
WSDA only 1995-2003; OTCO, QAI, ICS added in 2004; CCOF added 2006*

Certified Organic Crop Acres Washington 2009

	Certified ac 2009	Transition ac 2009	% Growth 08-09
Forage	32,659	247	9
Vegetables	15,668	69	-21
Tree Fruit	21,862	2,341	29
Grains, Dry Beans, Oilseeds	13,084	36	54
Small Fruit and Nuts	3,392	606	6
Herbs	1,190	-	5
Mixed Horticulture	811	5	3
Fallow	15,303	389	56
Timber/Woods & other noncrop	1,226	5	24
<i>Undefined WSDA land</i>	3,141	5	-35
Total	108,336*	3,703	13%

WSDA, OTCO, CCOF, ICS data

*Includes 3,374 acres double crop; actual certified land area = 104,962 ac



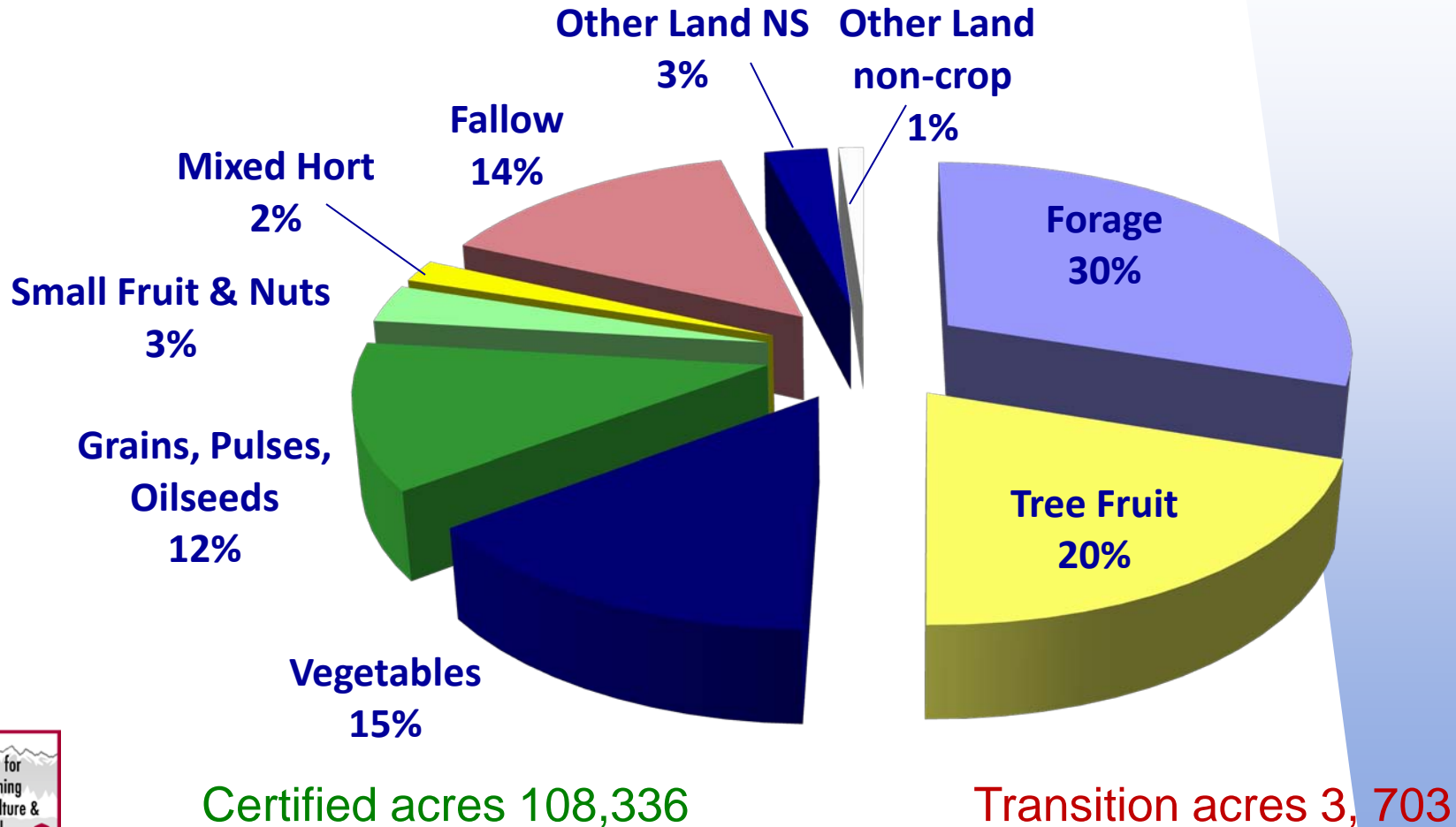
Organic Share of WA Agriculture 2008

No. farms	1.9%
Farmland	0.7%
Harvested cropland	1.5%
Apples *	10%
Farmgate sales	4.3%

Apple percent based on 2009 certifier data

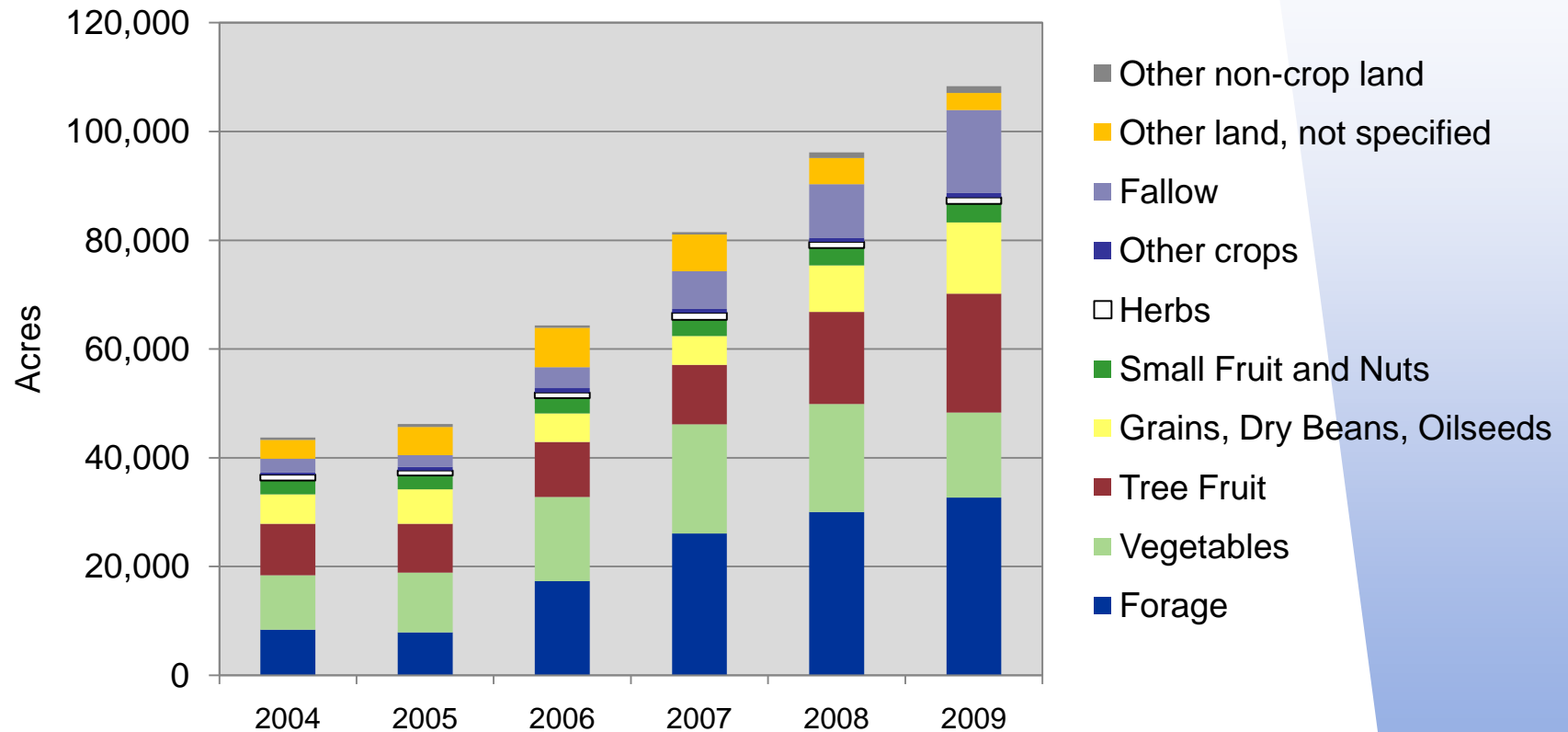


Crop distribution of certified organic acres in Washington – 2009



WSDA, OTCO, ICS, CCOF data. Certified land area = 104,962 ac including 3,141 unidentified ac. Double crop = 3,374 ac

Crop distribution of certified organic acres in Washington



WSDA, OTCO, ICS, CCOF data; double crop ac included

Overview of PNW Organic Ag 2008 Organic Production Survey

	Washington	Oregon	Idaho	Total PNW	California
No. Farms*	887 (689C)	657 (424C)	254	1,798	2,714
All acres	82,216 (92,555 ^a)	105,605 (115,502 ^a)	148,425	336,246	470,903
Harvested crop acres	60,772	57,204	93,946	211,922	218,838
Crop sales (mil. \$)	230.0	81.6	33.6	345.2	839.0
Livestock sales (mil. \$)	51.9	74.0	37.5	163.4	309.6
All sales (mil. \$)	282.0	155.6	71.3	508.9	1,148.6

* USDA-National Agriculture Statistic Service (NASS) 2008 Organic Production Survey **Includes certified and exempt. Values in () are from certifier data and only include certified farms. ^a Values from Kirby and Granatstein, 2009; certifier data include all certified land cropped or not cropped.

Washington State Status 2008 Organic Production Survey

	U.S.	WA	Rank
No. farms C+E ^a	14,540	887 (689 C) ^b	3
All acres	4.08 mil	82,216 (92,555 C) ^b	16
Harvested crop acres	1.60 mil	60,772	8
Crop sales (mil. \$)	1,942.3	230.0 (12%)	2
Livestock sales (mil. \$)	1,222.7	51.9	7
All sales (mil. \$)	3,165.0	282.0 (9%)	2

^aC=certified E=exempt, ^b compiled certifier data Kirby and Granatstein, 2008



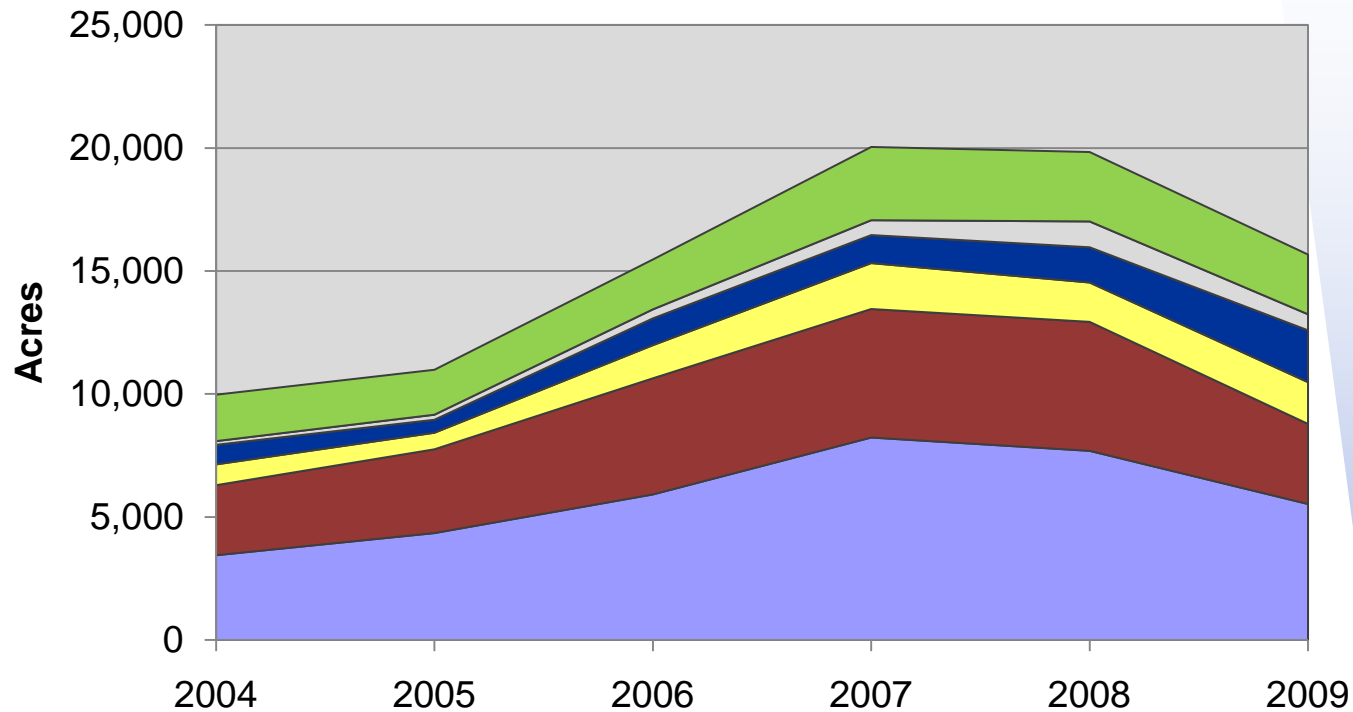
Top Organic Crops in WA

2008 Organic Production Survey

		Rank*			Rank
Apple		1	Sweet corn		1
Pear		1	Green pea		1
Cherry		1	Snap bean		1
Grape		2	Onion		1
Peach		2	Carrot		2
Blueberry		2	Potato		3
Raspberry		2	Squash, All		3
Strawberry		2	Other Vegetables		3
			Fresh Herbs		2
		<u>Organic Sales (mil \$)</u>			
Fruit		154.8			
Vegetable		42.7			
Milk		37.7			

* Rank in national production

Organic Vegetable Acres Washington State



■ Sweet Corn
 ■ Peas
 ■ Potatoes
 ■ Green Beans
 ■ Onions
 ■ Other & Mixed



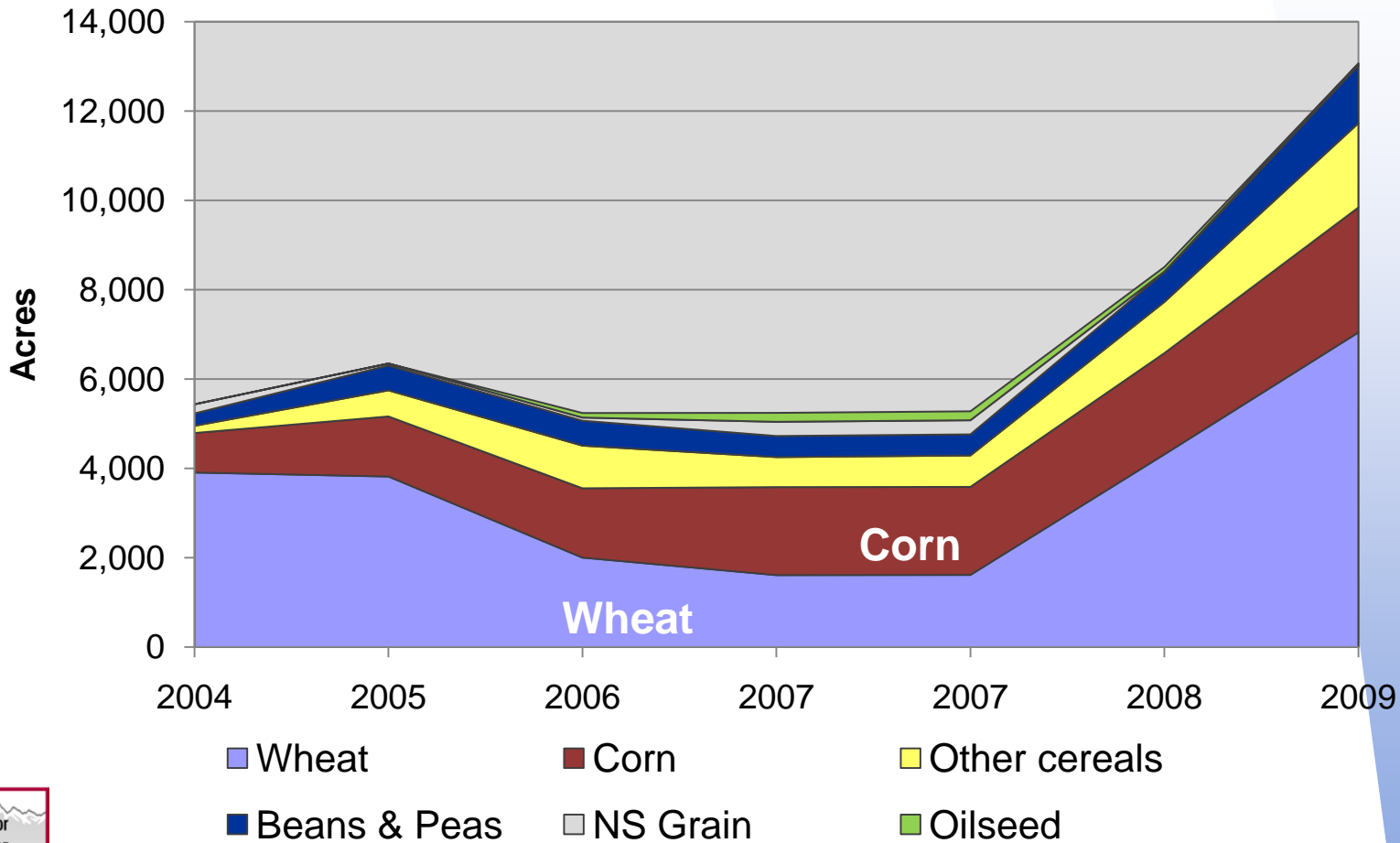
Organic Vegetable Production in the PNW 2008

	No. farms	Harvested acres	Sales (mil. \$)
WA	321	14,776	42.7
OR	204	5,188	27.1
ID	61	898	2.3
Total PNW	586	20,862	72.1
California	546	82,818	457.3

USDA-NASS, 2008 Organic Production Survey



Organic Grain and Pulse Acres Washington State



Combined certifier data



Organic Wheat Acres 2008

	Durum	Other Spring	Winter	All Wheat
US*	22,038	93,372	202,968	318,378
1 MT	19,604	33,931	16,815	70,350
2 UT		850	36,829	37,679
3 CO		3,597	23,179	26,776
4 ND	1,589	20,867	3,081	25,537
5 WY		(D)	25,079	25,079
12 OR		4,862	1,489	6,351 (3,919**)
17 WA		923	2,294	3,217 (4,315**)
2009 Washington**				7,044

2009 WA Oilseed; 8 ac camelina

* USDA-NASS 2008 Organic Production Survey, **WSDA, OTCO and other certifier data; may include forage (end use difficult to segregate).



Organic Wheat

Washington State 2008 - 2009

County	2008	2009		Type 2009
Western WA	62	117	IRR ?	NS
Adams	482		IRR ?	NS
Benton	-	206	IRR ?	Red
Chelan	-	3	DRY?	Red
Douglas	586	569	DRY ?	NS, White, Red
Franklin	55	243	IRR ?	NS, Emmer
Garfield	30	161	DRY ?	White
Grant	2,022	4,625	IRR ?	NS, White, Red
Lincoln	-	35	DRY?	Red, White
Okanogan	198	292	DRY ?	NS, Emmer
Spokane	-	75	DRY ?	NS
Stevens	303	300	DRY ?	NS
Walla Walla	352	159	DRY ?	NS, White
Whitman	47	61	DRY ?	NS, Red
Yakima	178	198	IRR ?	White
TOTAL	4,315	7,044		
IRR ?	2,799 ?	5,389 ?		
DRY ?	1,516 ?	1,494 ?		

Combined certifier data; NS (not specified) could include some forage



Organic Forage Acres 2008

2008	Dry Hay, All	Haylage, Silage & Greenchop	Corn Silage	Pasture
US*	415,476	118,541	24,871	1,847,779
ID*	54,993	3,009	--	37,334
OR*	28,913	3,631	879	34,659
WA*	11,358	6,281	1,404	16,279

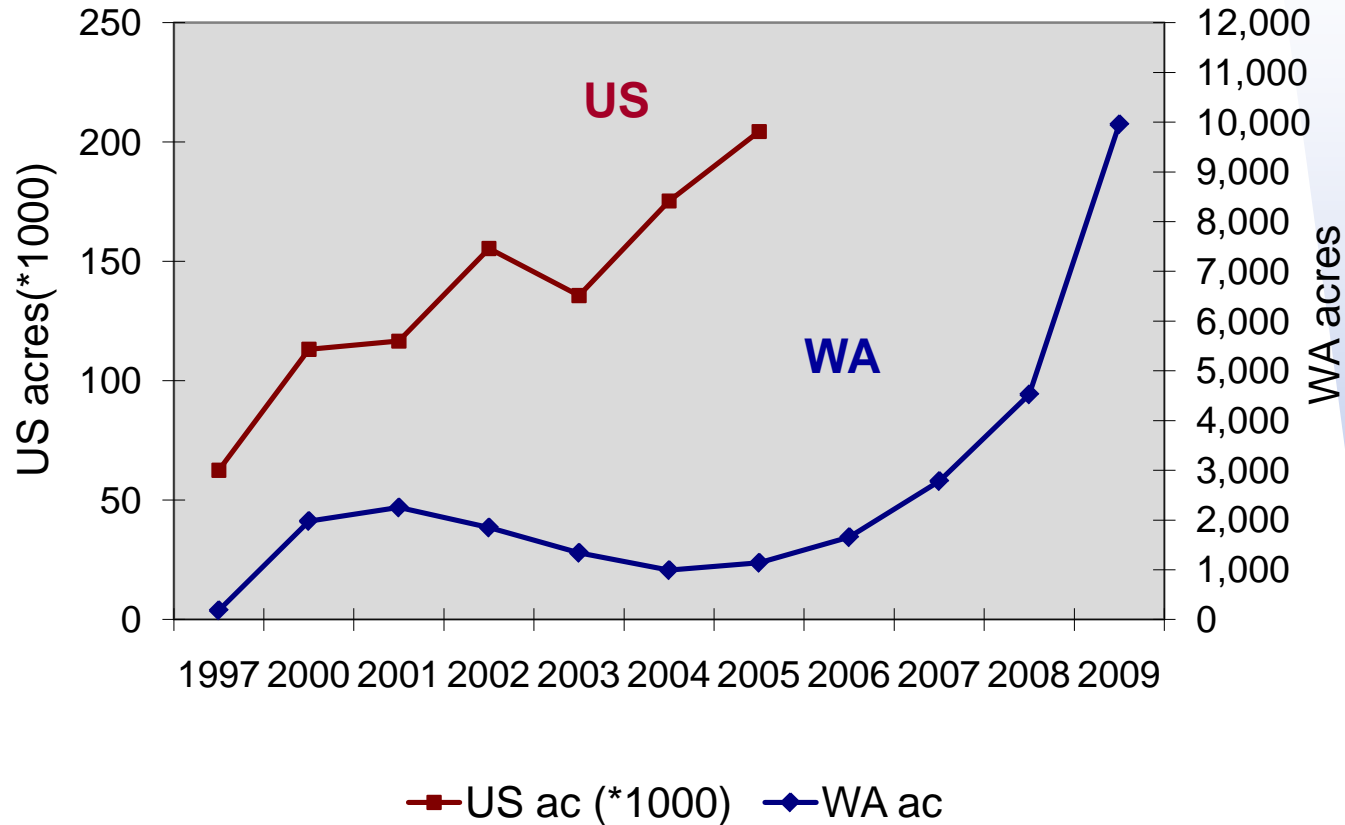
Certifier	Alfalfa	Other Hay, Silage	Corn silage	Pasture
2009 WA**	9,957	8,575	1,020	13,085
2008 OR**	22,342	31,643	718	34,561



*USDA-NASS 2008 Organic Production Survey

** Combined certifier data

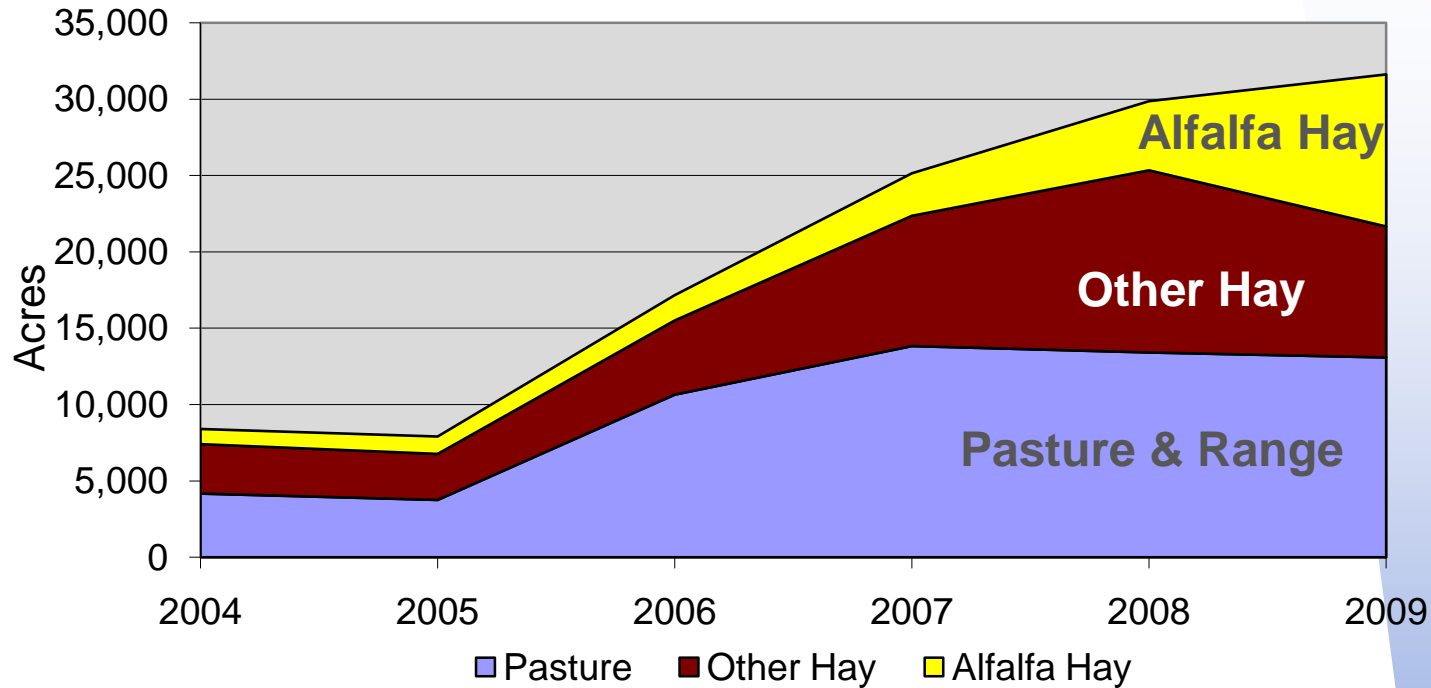
Organic Alfalfa



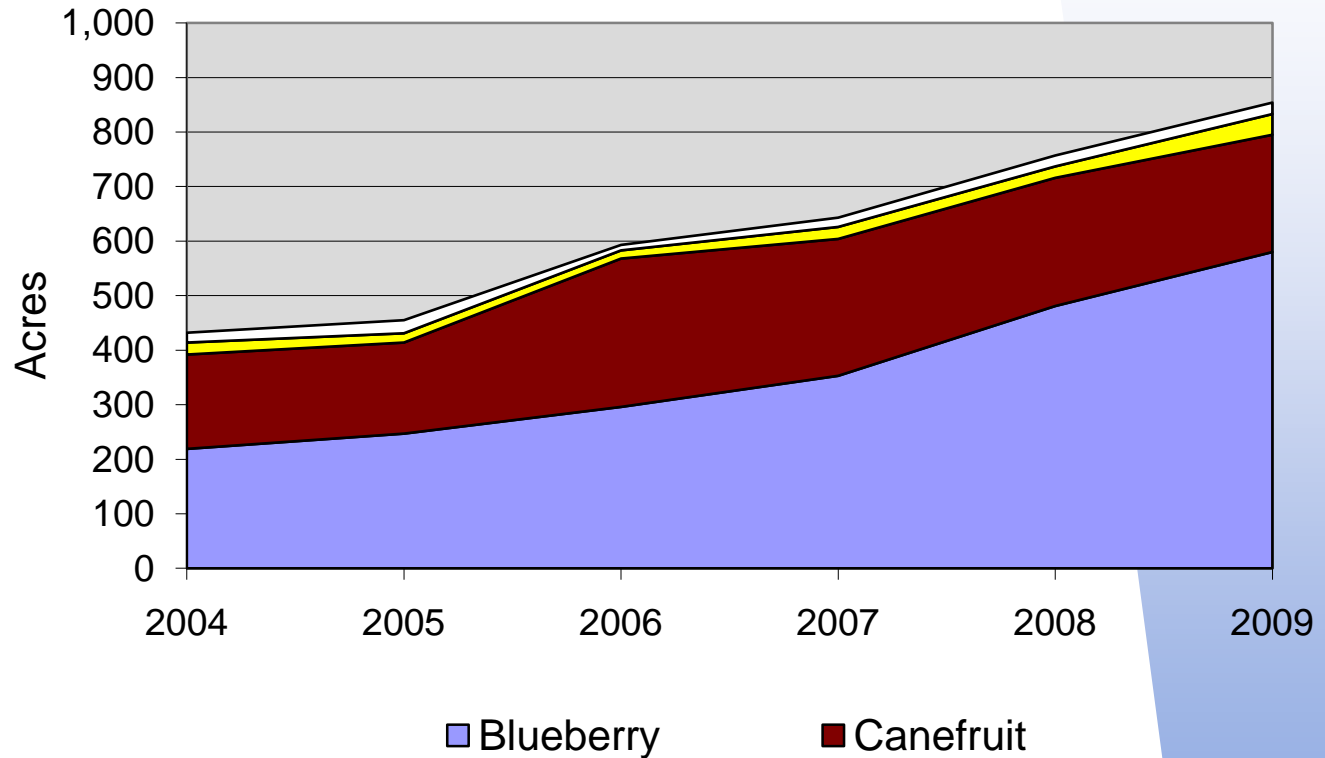
USDA-ERS WSDA, OTCO and other certifier data; US alfalfa not reported in 2008 Organic Production Survey



Organic Forage Trend Washington State

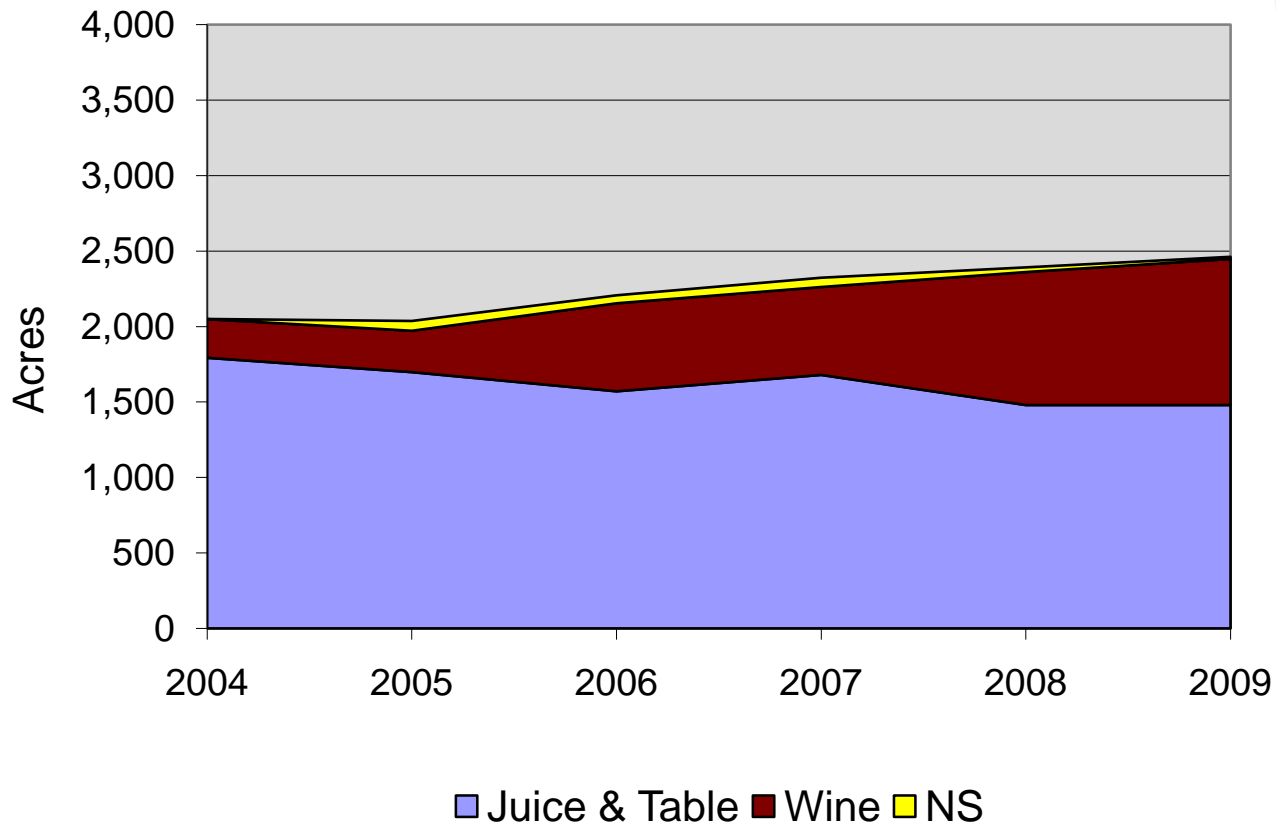


Organic Berry Acres Washington State





Organic Grape Acres Washington State



Organic Tree Fruit Acres Washington State

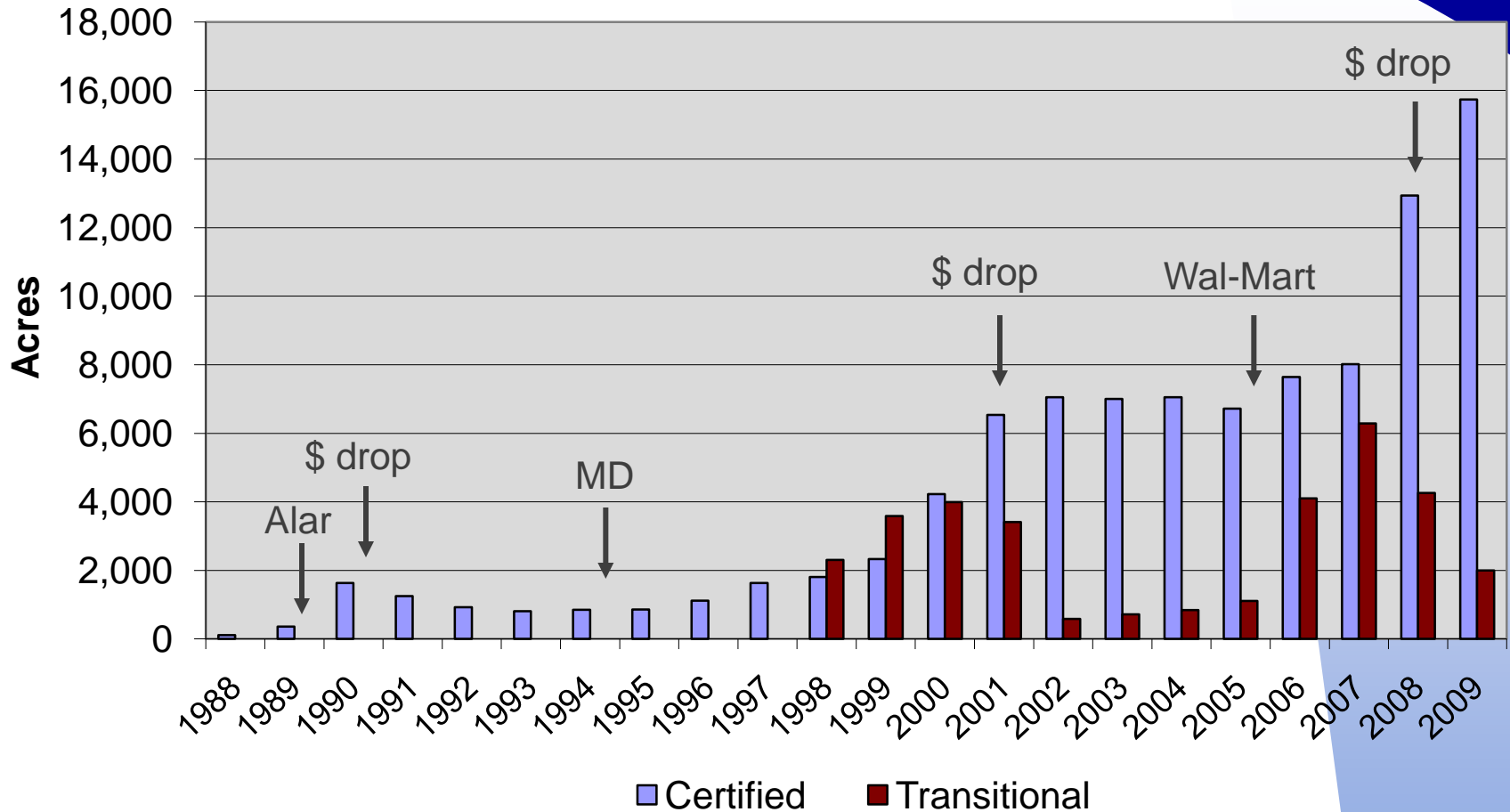


	Cert ac 2008	Cert ac 2009	C Growth 08-09	Tran ac 2008	Tran ac 2009
Apple	12,936	15,735	22%	4,256	2,001
Pear	1,713	1,964	15%	444	154
Cherry	1,738	2,437	40%	797	150
Apricot	107	265	148%	479	20
Peach & Nectarine	313	1,238	296%	832	12
Plum & Prune	97	130	34%	49	5
Mixed stone	78	30	--	164	--
Total	16,982	21,799	28%	6,721	2,342



*Combined certifier data; Cert, C = Certified; Tran = Transition
Photo: ARS Gallery*

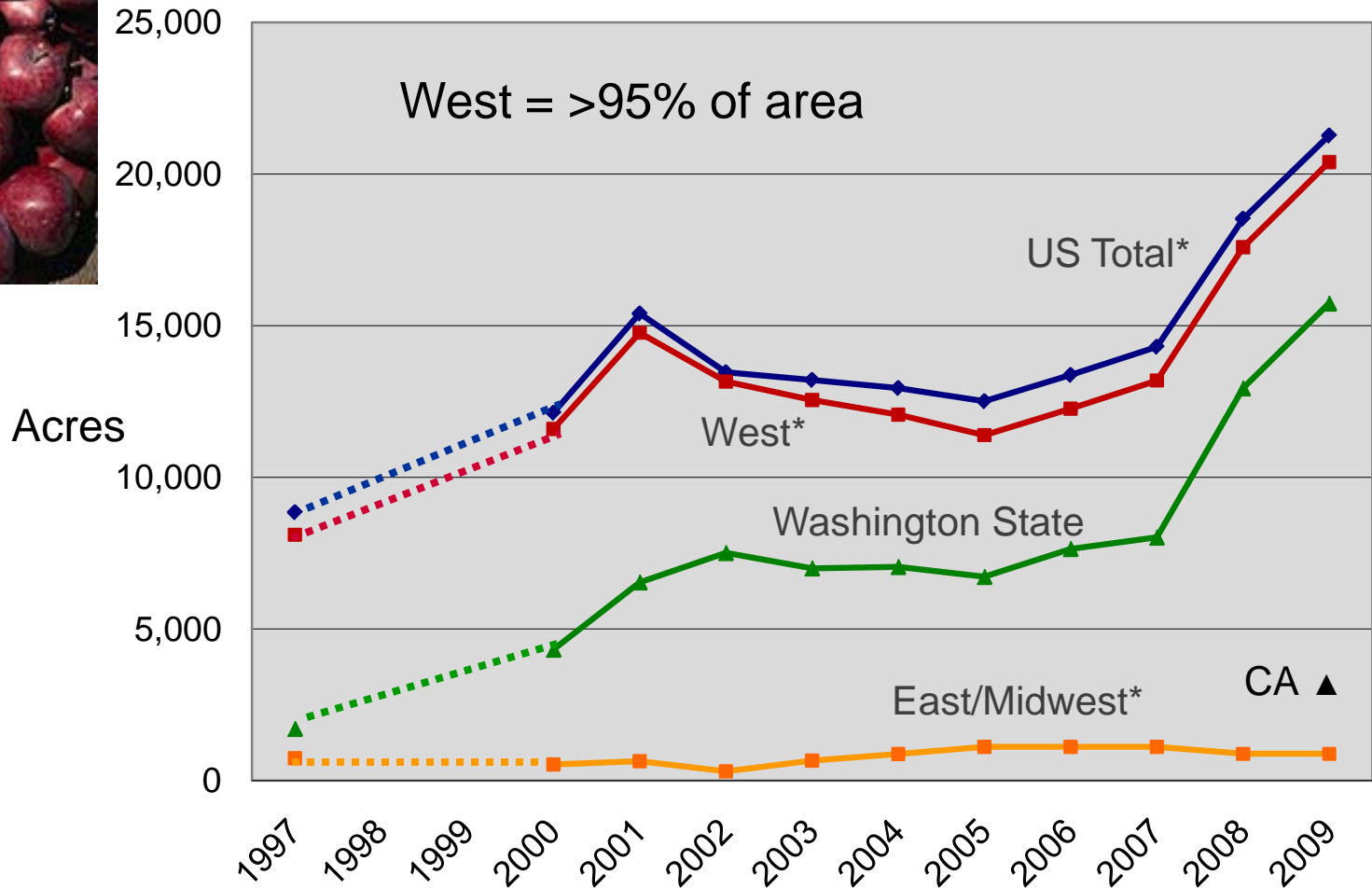
Organic Apple Area Washington State



15,735ac = 10% of WA apple bearing acreage
 (based on 2008 WA-NASS estimate of 153,000 acres)

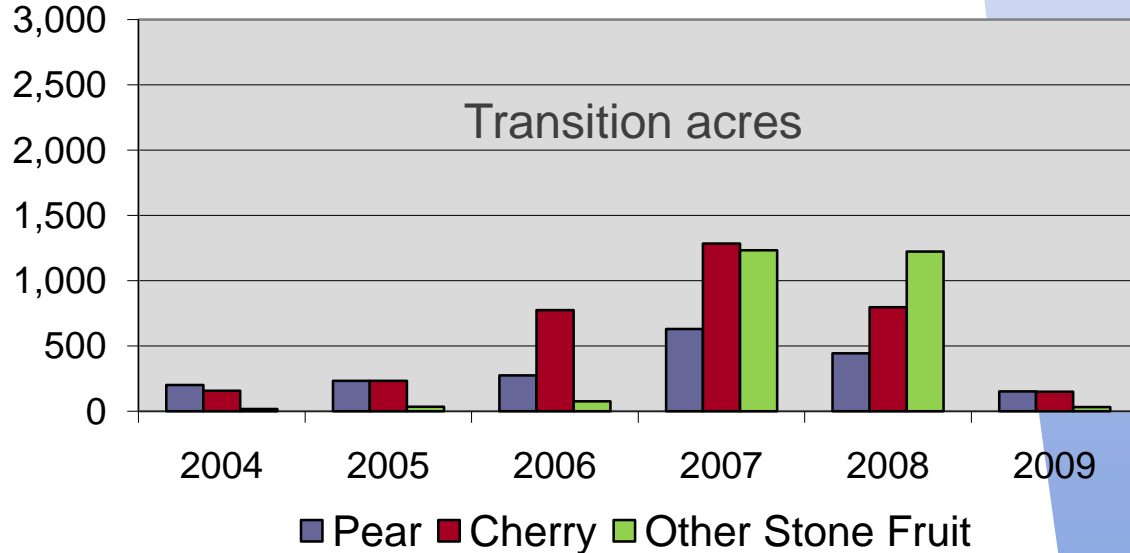
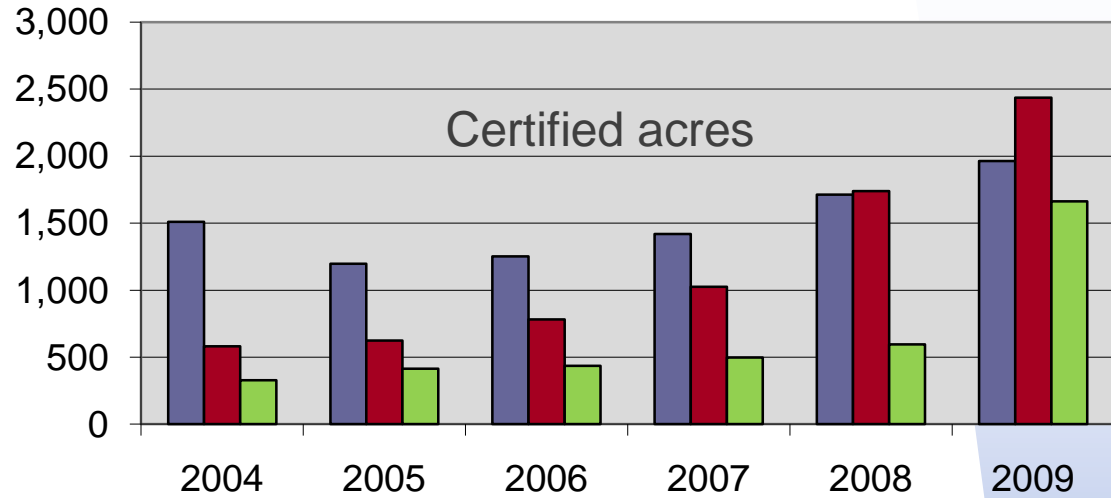


Estimated U.S. Organic Apple Trend



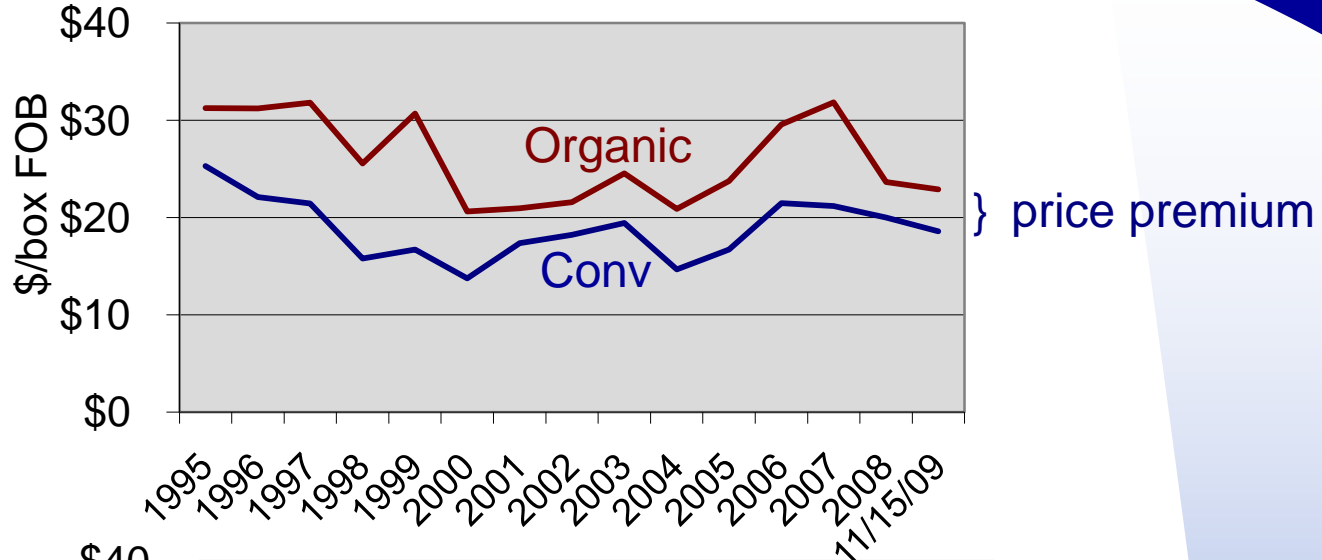
Based on combined data from WSDA, ERS, CDFA AZ Apple Growers Assoc., QAI and OTCO; * same data for 2008 and 2009, except WA and CA

Washington State Pear and Stone Fruit Trend

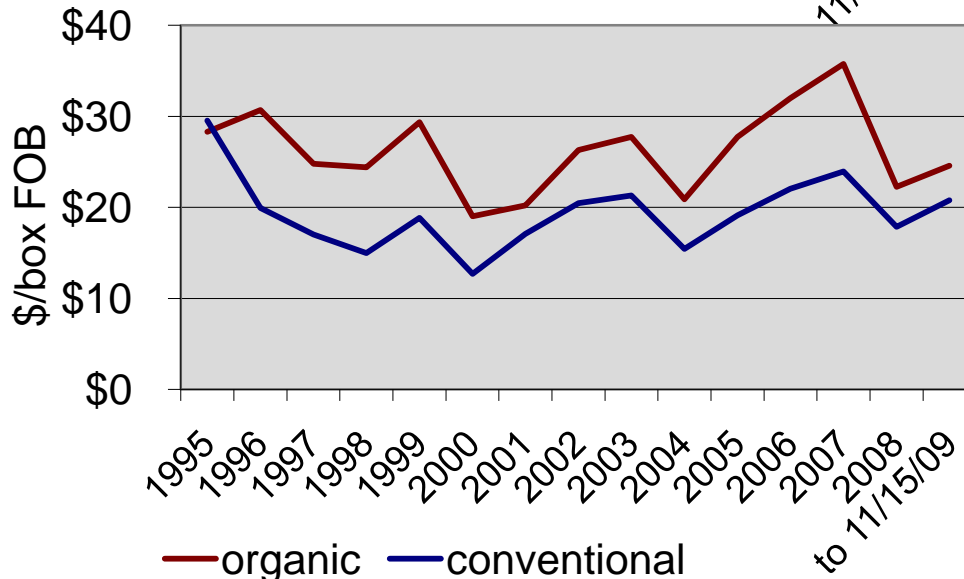


Apple Price Trends

Gala



Fuji



US Organic Dairy Cows

2008 Organic Production Survey

Rank		No. Farms	Milk cows	% of State Herd*	Avg cows per farm
	U.S.	2,065	201,960	--	106
1	California	96	36,561	2	381
2	Wisconsin	479	27,719	2	58
3	Texas	10	24,019	6	2,402
4	New York	319	18,623	3	58
5	Oregon	51 (60**)	17,306	15	339
6	Vermont	182	13,100	9	72
7	Pennsylvania	225	11,608	2	52
8	Florida	20	9,176	8	459
9	Washington	42 (46**)	9,009	4	215

***US organic dairy cows ~2 % of national herd**

USDA-NASS 2008 Organic Production Survey peak inventory, certified and exempt; *
Based on 2007 Ag Census data ** number reported by certifiers



Certified organic dairy cows Washington State

	----- Certified -----				Transition
	2006*	2007	2008	2009	2009
Milkers & dry	2,970	7,282	9,022	9,329	153
Replacement	2,180	7,964	7,022	6,587	440
Total	5,150	15,251	16,044	15,976	593
# organic dairies	23	45	46	41	3

1 Goat dairy; 40 milk goats

****Organic dairy cows ~4%
of state herd**

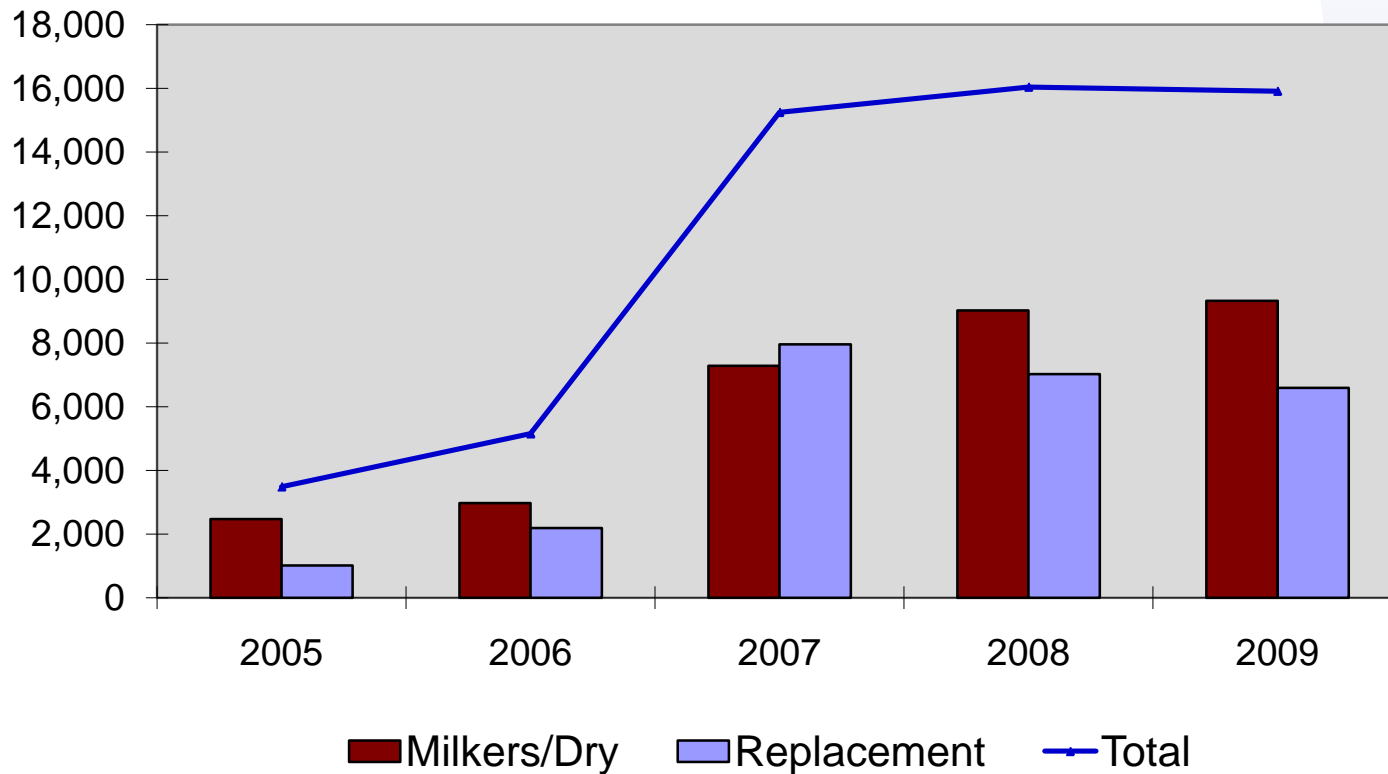


Photo: ARS Gallery



*Combined certifier data; *WSDA data collected in 2006, '07, '08, and '09 reflect number of animals on farm in previous year. Other certifier data are current year. ** Based on 2007 Ag Census data*

Estimated organic dairy cows Washington State



*Combined certifier data; *WSDA data collected in 2006, '07, '08, and '09 reflect number of animals on farm in previous year. Other certifier data are current year.*

US Organic Beef Cattle 2008 Organic Production Survey

Rank		No. Farms	Beef cows	Avg cows per farm	% of State Herd*
	U.S.	1,095	48,946	45	--
1	California	56	5,403	96	0.82
2	Wyoming	17	4,720	278	0.64
3	Wisconsin	109	3,350	31	1.24
4	South Dakota	25	2,625	105	0.16
5	Idaho	24	2,576	107	0.54
10	Oregon	44	1,711	39	0.28
13	Washington	36	1,436	40	0.52

***US organic beef cows ~ 0.15% of national herd**



US Organic Livestock 2008 Organic Production Survey

	US	# 1	Stock	# 2	Stock	OR	WA
Hog & Pigs	14,266	IA	4,634	MO	2,134	(#14) 50	(#18) 12D
Sheep & Lambs	16,476	CO	2,589	TX	1,177	(#4) 816	(#5) 727
Goats & Kids	8,895	IA	941	CA	748	(#8) 382	(#7) 397



US Organic Poultry

2008 Organic Production Survey

Layers		Broilers		Turkeys	
Rank	No.	Rank	No.	Rank	No.
U.S.	4,489,995		6,358,231		229,346
1 CA	830,396	1 CA	3,942,135	1 CA	83,112
2 PA	695,767	2 PA	573,718	2 PA	34,932
3 IA	284,977	3 IA	392,579	3 WI	6,710
4 TX	264,344	4 KY	15,850	4 VT	880
		5 NY	15,145		
5 WA	249,462	10 WA	6,837	5 WA	880
13 OR	2,470	14 OR	1,395	8 OR	459



USDA-NASS 2008 OPS peak inventory, certified and exempt
* Based on 2007 Ag Census data

Washington State 2008 Number Other Livestock Operations

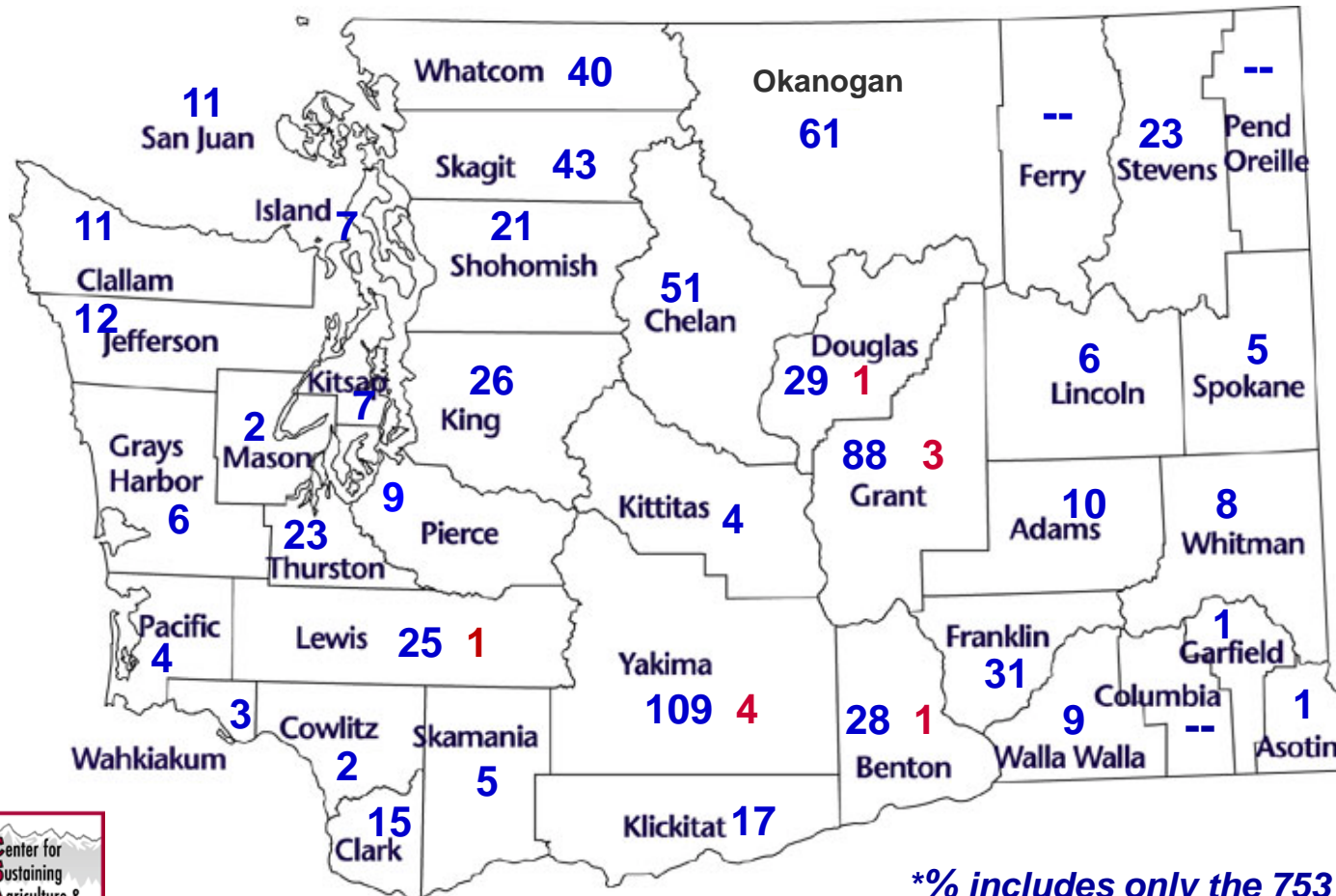


	Certified + Exempt	Exempt only
Layer	58	26
Broiler	11	1
Turkey	7	1
Beef Cattle	36	13
Hogs and Pig	5	2
Sheep and Lamb	19	13
Goats and Kid	11	6



*Table includes USDA-NASS 2008 Organic Production Survey Certified and Exempt farm values.
WSDA, OTCO **Does not include dairy beef operations*

Number of Certified Farms by County Washington 2009



Farms
753 certified
10 transition

Eastern WA
64% of farms*

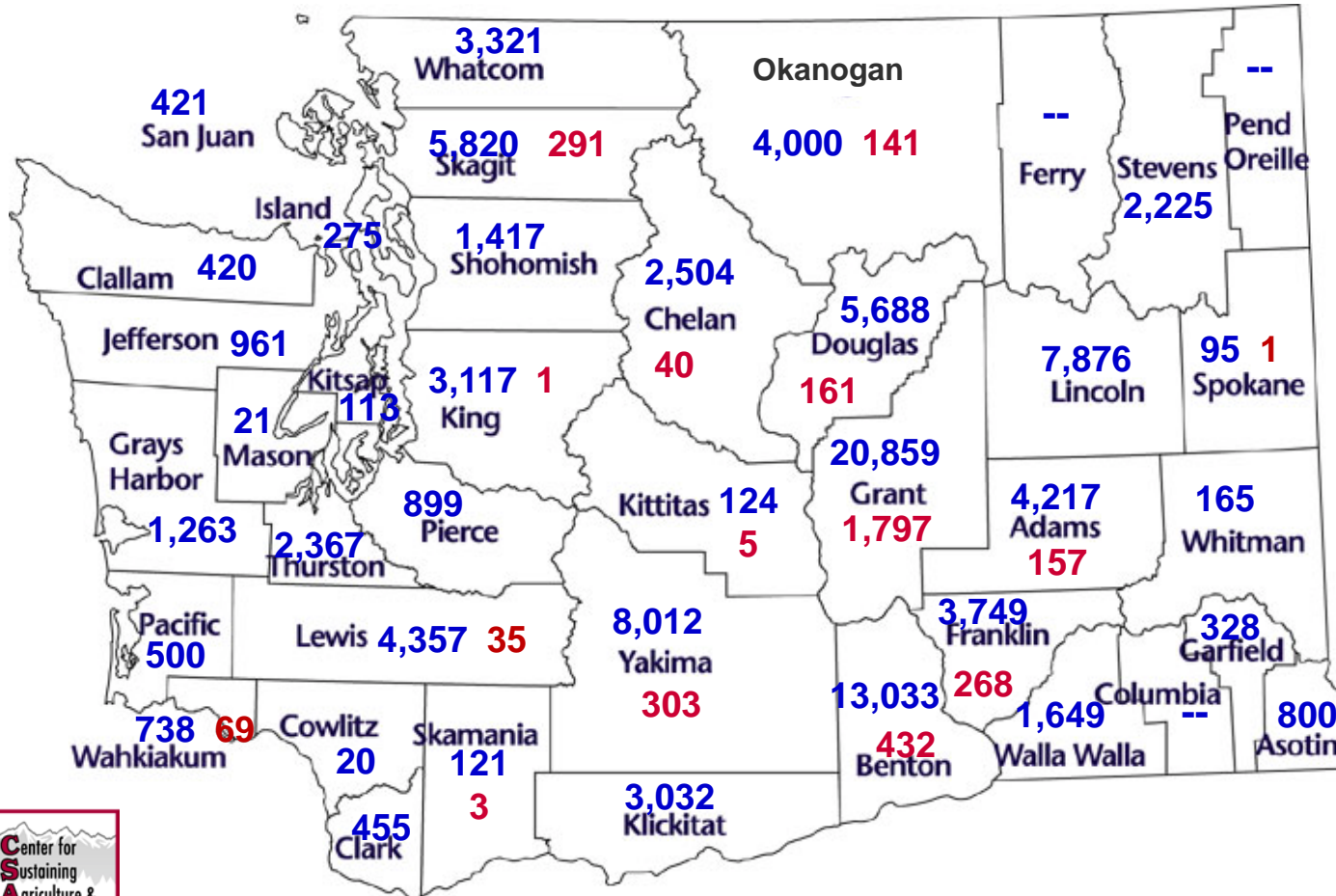
Western WA
36% of farms*

**% includes only the 753 farms with certified land*

WSDA, OTCO, ICS, CCOF, QAI data; Farm nos. are estimates; some growers report several farms under one certification number and county whereas land may be in various cos.



County Certified Farm Area Washington 2009



Cert 104,962 ac*
Trans 3,703 ac

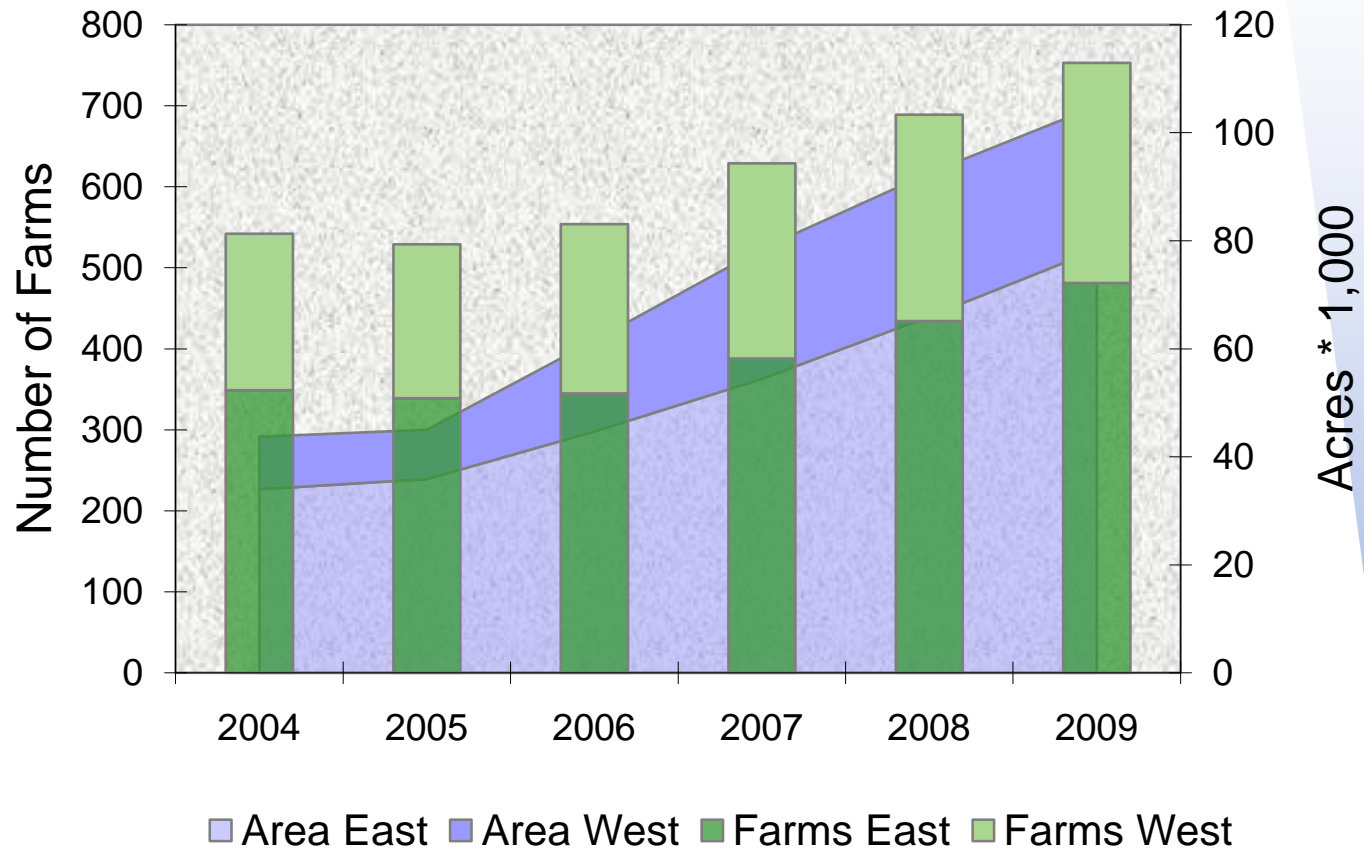
Eastern WA
75%
of certified ac

Western WA
25%



*WSDA, OTCO, ICS, CCOF, QAI data; includes undefined WSDA land, does not include 3,374 double crop acres

Regional Certified Farms and Area Washington State



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

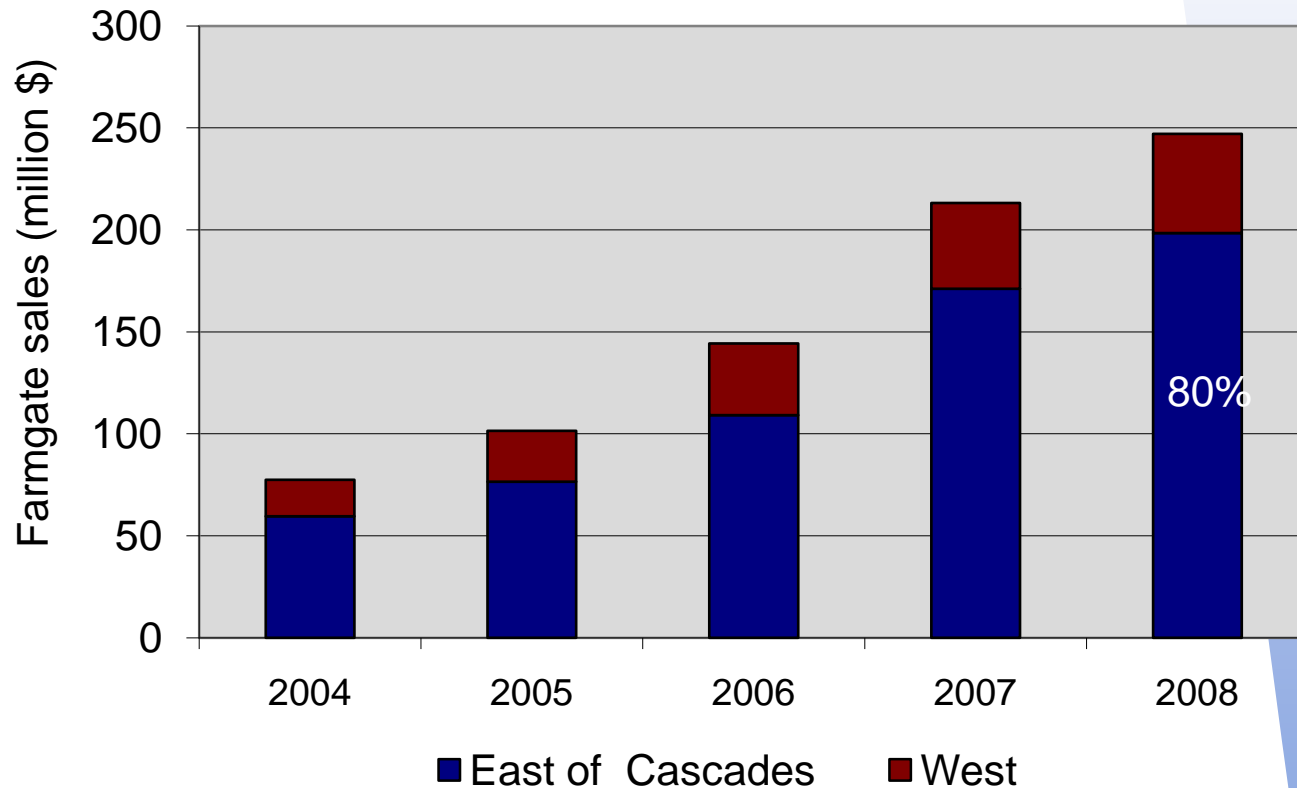
Summary of Organic Farms Washington State

	2006	2007	2008	2009	
Certified acres ^a	64,325	81,472	96,139	108,336	
Transition acres	7,890	13,183	9,380	3,703	
No. Producers ^b	C 554 T (26)	629 (71)	689 (53)	753 (10)	
Ave. area (ac) / producer	111	125	134	139	
Farm gate Sales ^c	2005 \$101.5MIL	2006 \$144.3MIL	2007 \$213.2MIL	2008 \$246.7MIL	OPS 2008 ^d \$281.9MIL



^a Acres include double crop and undefined WSDA land; *area* certified = 61,541 acres (2006); 78,529 ac (2007); 92,555 (2008); 104,962 (2009). Average size based on *area* certified /organic farm number did not inc. double crop ac or transition only farms. ^b Includes livestock and crop producers. ^c Sales reported by WSDA and OTCO only; some cooperative (dairy) sales not reported. ^d USDA-NASS 2008 Organic Production Survey WA sales = Certified and Exempt

Organic Sales Trend Washington State



Estimated Washington Organic Farmgate Sales by Region

	2005 CY	2006 CY	2007 CY	2008 CY	-- % growth--	
	-----MILLION-----				06-07	07-08
East	\$76.6	\$109.2	\$ 171.1	\$198.1	57%	16%
West	\$ 24.9	\$ 35.1	\$ 42.1	\$48.6	20%	15%
Total WA	\$101.5	\$144.3	\$213.2	\$246.7	48%	16%



CY = Calendar year; WSDA and OTCO data only

Estimated 2008 Organic Farmgate sales, Eastern Washington



Photo: WSU Small Farms Program

\$ 198.1 MIL total East
80% of state sales
\$246.7 MIL total WA

Grant	\$ 51,920,629
Benton	\$ 39,532,259
Yakima	\$ 24,507,400
Chelan, Douglas*	\$ 32,604,024
Walla Walla	\$ 14,604,314
Okanogan	\$ 12,716,501
Franklin	\$ 8,152,407
Adams	\$ 6,803,978
Klickitat	\$ 6,271,043
Spokane, Stevens, Lincoln	\$ 870,299
Asotin, Garfield, Whitman	\$ 128,615
Kittitas	\$ 40,108

**Some Douglas & Grant Cos. farm gate sales reported as Chelan Co. WSDA & OTCO data; previous year (2008) sales reported in 2009. Does not include sales from other certifiers.*

Estimated 2008 Organic Farmgate Sales, Western Washington

Skagit	\$ 13,339,494
Thurston	\$ 6,533,326
King	\$ 5,873,710
Whatcom	\$ 4,938,859
Lewis	\$ 4,351,611
Grays Harbor, Mason	\$ 4,005,861
Snohomish	\$ 2,045,591
Pierce	\$ 1,690,631
Clark, Cowlitz	\$ 1,447,368
Jefferson	\$ 841,382
Clallam	\$ 824,415
Pacific, Wahkiakum	\$ 773,070
San Juan, Island	\$ 275,440
Kitsap	\$ 263,421
Skamania	\$ 167,384



Photo courtesy of Sequim Lavender Festival

\$48.6MIL total West
20% of total
\$246.7MIL total WA



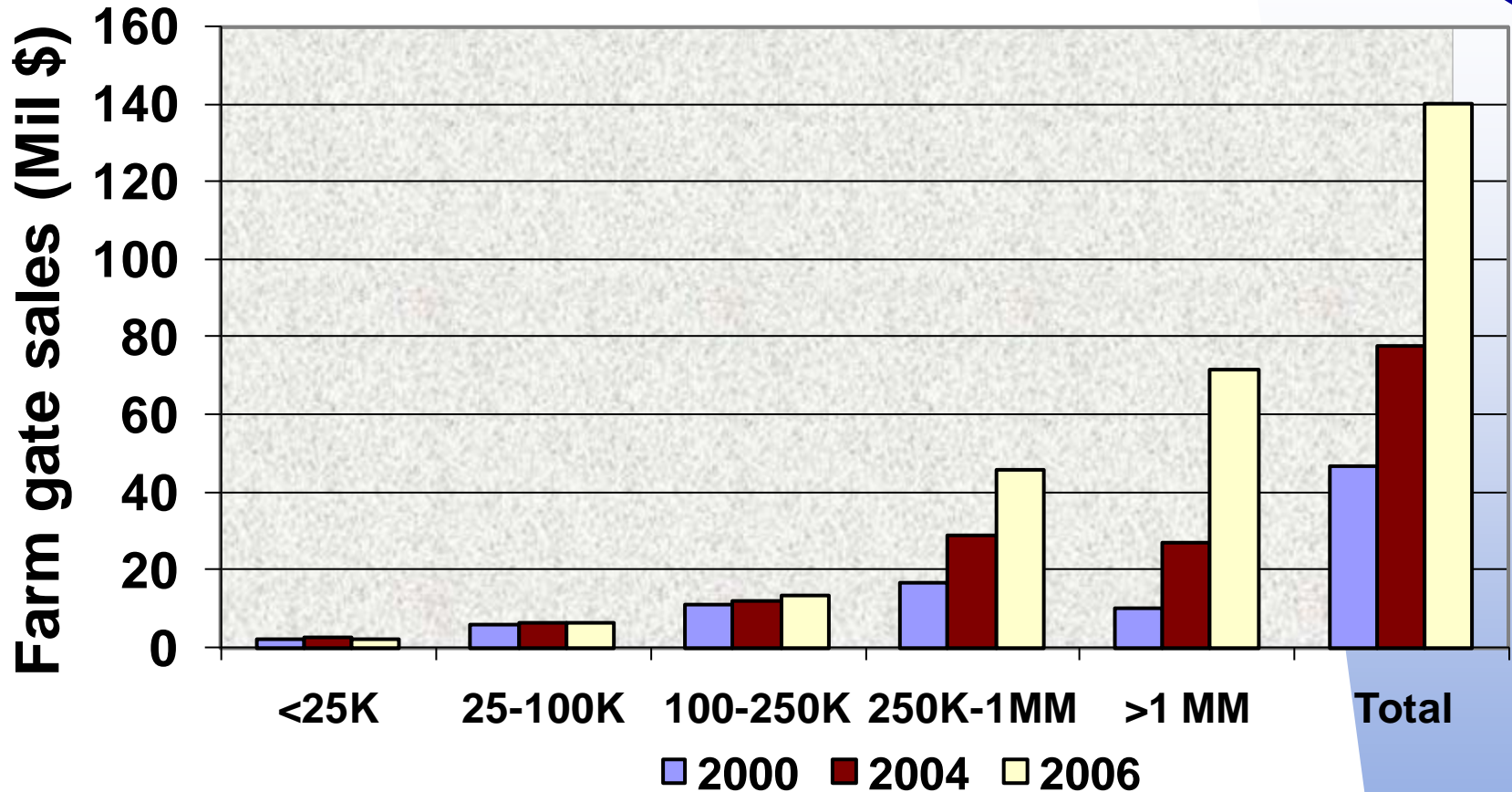
Organic Farm Size versus Sales Washington 2008

Sales	% of Farms	% of Sales
<25K	46	1
25-100K	19	3
100-250K	12	6
250K-500K	9	10
>500K	15	80

USDA-NASS 2008 Organic Production Survey data



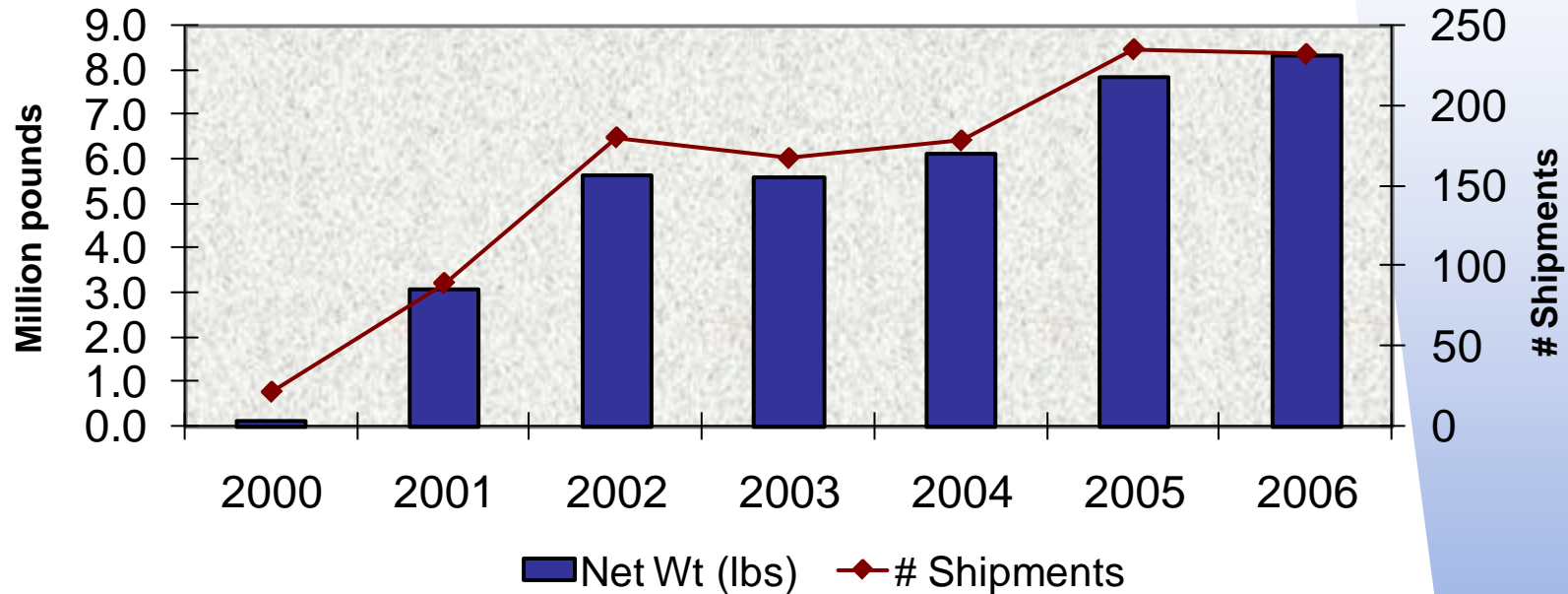
Organic Farm Gate Sales Washington



Larger farms (> \$250K sales) account for about 84% of total organic sales (up from 73% in 2004)



WSDA Organic Exports to the European Union



Primarily tree fruit; also dried herbs, seeds, oils

