

# Data Release: 2014 Organic Survey

September 17, 2015



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# 2014 Organic Survey

- Overview and Survey Design
- Highlights of the Results
  - Farms and Land in Farms
  - Economics
  - Marketing Channels
  - Production Practices



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# Organic Survey History

- This is the third organic production and practices survey NASS has conducted.
- The 2008 Organic Production Survey (OPS) collected data from three organic operation groups – certified, exempt, and transitioning.
- The 2011 Certified Organic Production collected data from certified organic operations only.

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# 2014 Organic Survey

- The 2014 Organic Survey is a census of all known U.S. certified, exempt, and transitioning land.
- The survey included operations on NASS's list frame from the 2011 Certified Organic Survey and the 2012 Census of Agriculture.
- The survey includes new entry operations obtained from the USDA's Agricultural Marketing Service (AMS) Certified Organic List and other list sources.

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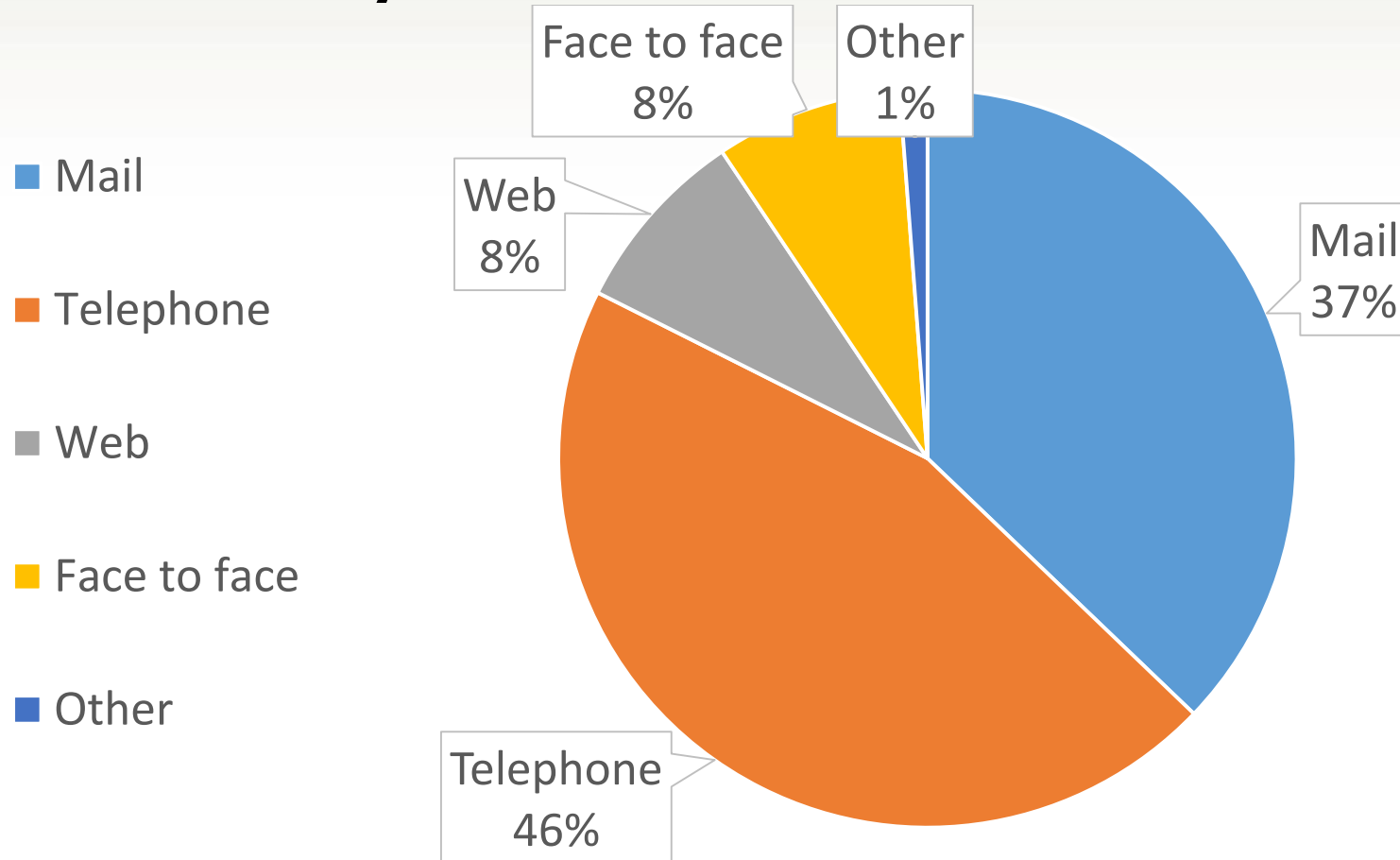
# Timeline

- The major activities for the Organic Survey consisted of:
  - Planning (January 2014 - December 2014)
  - Data collection (January 2015 – April 2015)
  - Data evaluation (April 2015 – September 2015)
  - Data release (September 17, 2015)

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# Forms by Mode of Data Collection



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# Stakeholder Support

- Major stakeholders include:
  - Organic producers, handlers and processors
  - Organic certifying agencies
  - Other USDA agencies
  - Organic associations
  - Research institutions

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# Organic Farms and Organic Land in Farms



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# Number of Organic Farms and Land, 2008, 2011, 2012 and 2014

|                            | 2008 Organic Production Survey <sup>1</sup> | 2011 Certified Organic Survey <sup>1,2</sup> | 2012 Census <sup>3</sup> | 2014 Organic Survey <sup>3</sup> |
|----------------------------|---|--|--------------------------|----------------------------------|
| <b>Total Organic Farms</b> | 14,540                                      | X  | 14,326                   | 14,093                           |
| Certified organic          | 10,903                                      | 9,140  | X                        | 12,634                           |
| Exempt from certification  | 3,637                                       | X  | X                        | 1,459                            |
| <b>Organic Land Acres</b>  | 4,077,337                                   | 3,648,896                                    | N/A                      | 3,670,560                        |

<sup>1</sup> Includes operations without sales of organic products

<sup>2</sup> Did not include operations that produced floriculture and nursery crops

<sup>3</sup> Includes operations with organic sales only

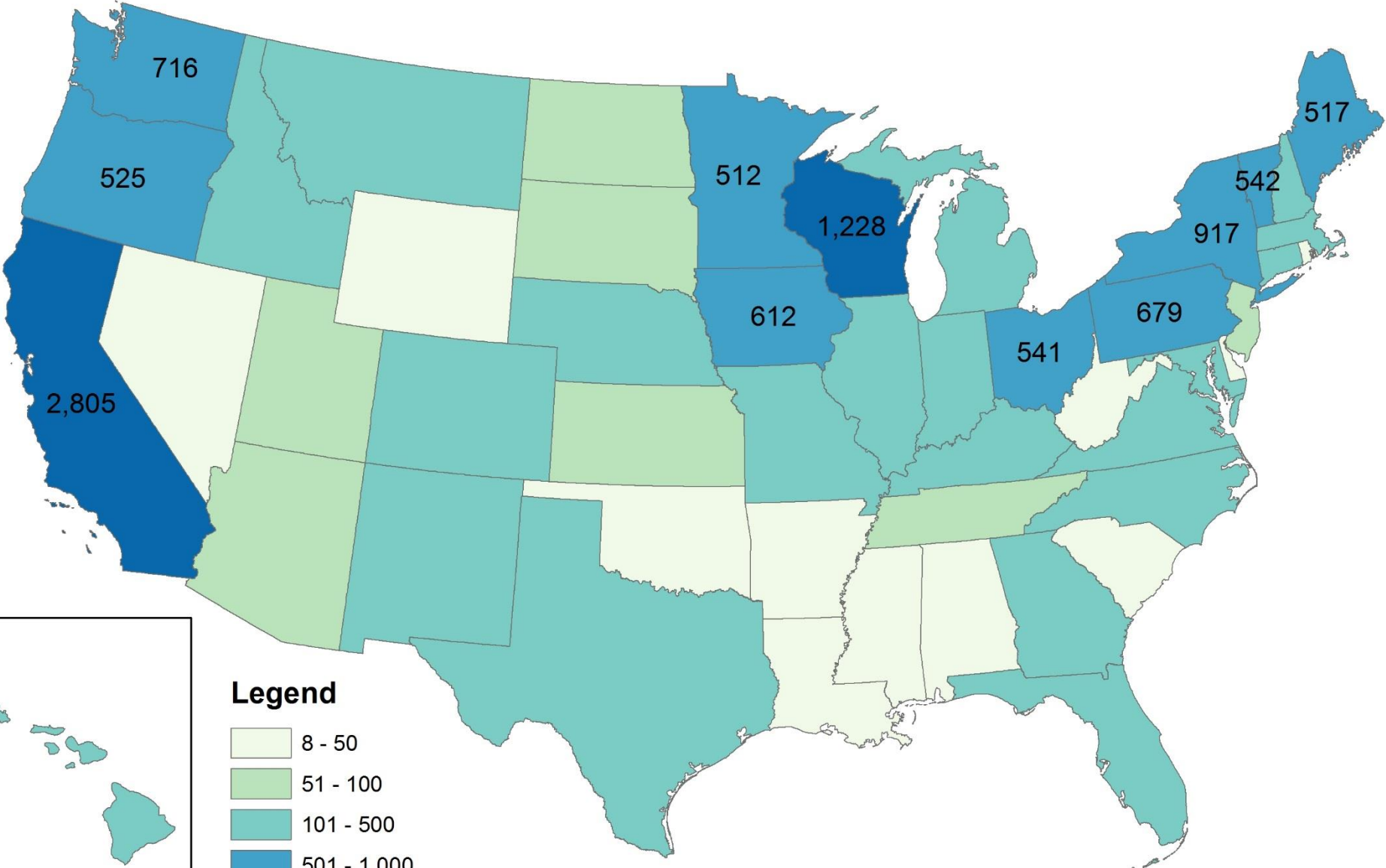
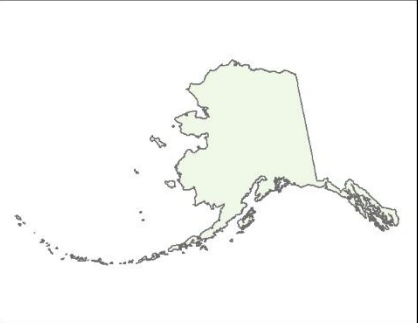
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# Number of Certified and Exempt Organic Farms: 2014



## Legend

- 8 - 50
- 51 - 100
- 101 - 500
- 501 - 1,000
- 1,001 - 2,805

# Top Five States in Organic Land, 2008 and 2014

| Top Organic States            | 2008<br>(acres)  | 2014<br>(acres)  |
|-------------------------------|------------------|------------------|
| California                    | 470,903          | 687,168          |
| Montana                       | 284,482          | 317,925          |
| Wisconsin                     | 195,603          | 228,605          |
| New York                      | 168,428          | 212,701          |
| Oregon                        | 105,605          | 204,166          |
| <b>US Total Organic Acres</b> | <b>4,077,337</b> | <b>3,670,560</b> |

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## Transitional Organic Farms and Area Operated, 2008 and 2014

|   | 2008<br>(farms) | 2014<br>(farms) | 2008<br>(acres) | 2014<br>(acres) |
|---|-----------------|-----------------|-----------------|-----------------|
| Transitional Organic Land                     | 1,773           | 1,365           | 194,384         | 122,175         |
| Certified Organic                             | 1,397           | 1,272           | 185,796         | 119,458         |
| Exempt from certification                     | 376             | 93              | 8,588           | 2,717           |
| Transitional Organic Land – Non Organic Farms | 2,064           | 688             | 197,912         | 50,688          |

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# Organic - Sales



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# Market Value of Organic Agricultural Products Sold, 2008, 2011, 2012 and 2014

|  | 2008 Organic Production Survey | 2011 Certified Organic Survey | 2012 Census | 2014 Organic Survey |
|--|--------------------------------|-------------------------------|-------------|---------------------|
| <b>Total Value of Agricultural Products Sold (billion dollars)</b> | 3.2                            | 3.5                           | 3.1         | 5.5                 |
| Value of Crops sold (billion dollars)                              | 2.0                            | 2.2                           | N/A         | 3.3                 |
| Value of Livestock Poultry and Products sold (billion dollars)     | 1.2                            | 1.3                           | N/A         | 2.2                 |

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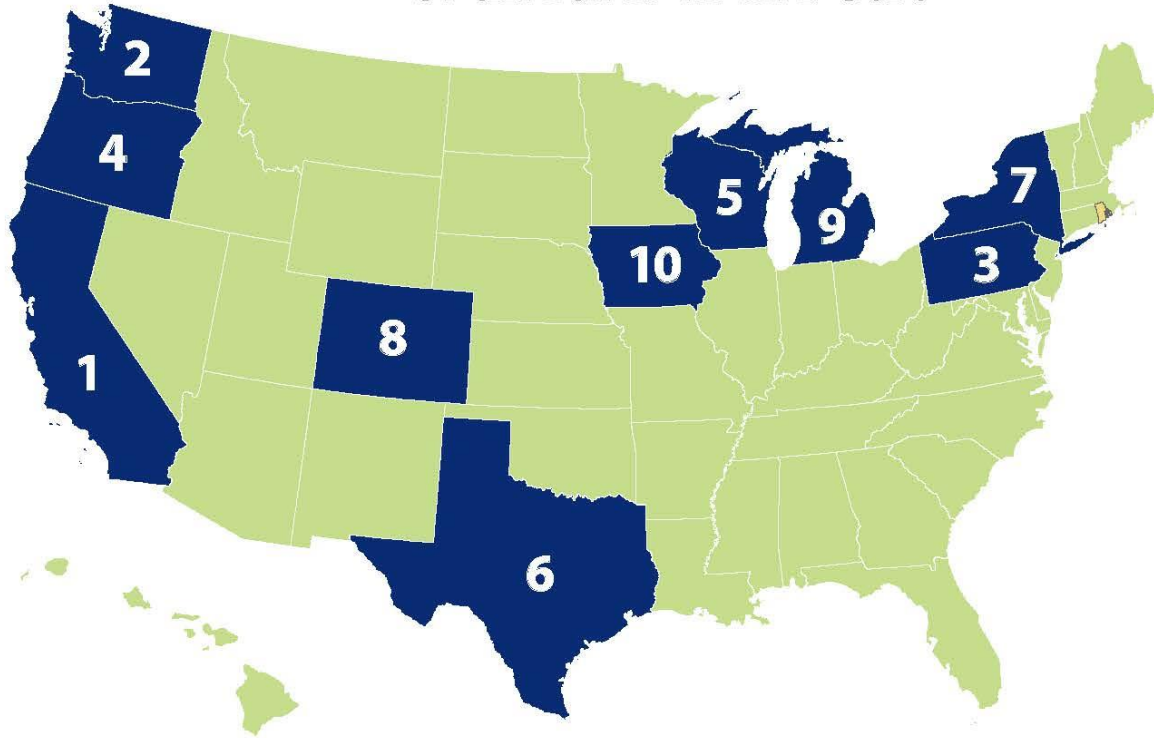
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# Top Ten States in Organic Sales, 2014

These states account for 78%  
of all sales in the U.S.



|              |         |
|--------------|---------|
| California   | \$2.2 B |
| Washington   | \$515 M |
| Pennsylvania | \$313 M |
| Oregon       | \$237 M |
| Wisconsin    | \$201 M |
| Texas        | \$199 M |
| New York     | \$164 M |
| Colorado     | \$147 M |
| Michigan     | \$125 M |
| Iowa         | \$103 M |

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## Top Five States in Organic Sales, 2008, 2012 and 2014

| Top Organic States            | 2008<br>Organic Sales<br>(million dollars) | 2012<br>Census Sales<br>(million dollars) | 2014<br>Organic Sales<br>(million dollars) |
|-------------------------------|--|---|--|
| California                    | 1,149                                      | 1,355                                     | 2,231                                      |
| Washington                    | 282  | 291                                       | 515  |
| Pennsylvania                  | 213  | 79  | 313  |
| Oregon                        | 156  | 194                                       | 237  |
| Wisconsin                     | 133  | 122                                       | 201  |
| <b>US Total Organic Sales</b> | <b>3,165</b>                               | <b>3,121</b>                              | <b>5,455</b>                               |

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# Top States in Organic Crop Production Sales 2014

| Top Organic Crop States | Organic Crop Sales<br>(million dollars) | US Total Organic<br>Crop Sales<br>(percent) |
|-------------------------|---|---|
| California              | 1,659                                   | 50  |
| Washington              | 387                                     | 12  |
| Oregon                  | 128                                     | 4   |
| Pennsylvania            | 91                                      | 3   |
| Arizona                 | 86                                      | 3   |
| <b>US Total</b>         | <b>3,290</b>                            |   |

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## Organic Vegetable Sales by Top Commodities, 2014

| Category                            | Sales<br>(million dollars) |
|-------------------------------------|----------------------------|
| <b>Vegetables grown in the open</b> | <b>1,250</b>               |
| Lettuce                             | 264                        |
| Spinach                             | 117                        |
| Broccoli                            | 79                         |
| Carrots                             | 69                         |
| Sweet potatoes                      | 68                         |

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## Organic Fruit Sales by Top Commodities, 2014

| Category                             | Sales<br>(million dollars) |
|--------------------------------------|----------------------------|
| <b>Fruit, Tree nuts, and berries</b> | <b>1,032</b>               |
| Apples                               | 250                        |
| Grapes                               | 195                        |
| Strawberries                         | 89                         |
| Blueberries                          | 61                         |
| Almonds                              | 32                         |

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## Organic Field Crop Sales by Top Commodities, 2014

| Category           | Sales<br>(million dollars) |
|--------------------|----------------------------|
| <b>Field crops</b> | <b>718</b>                 |
| Corn for grain     | 155                        |
| Hay                | 139                        |
| Wheat              | 102                        |
| Soybeans           | 72                         |
| Rice               | 35                         |

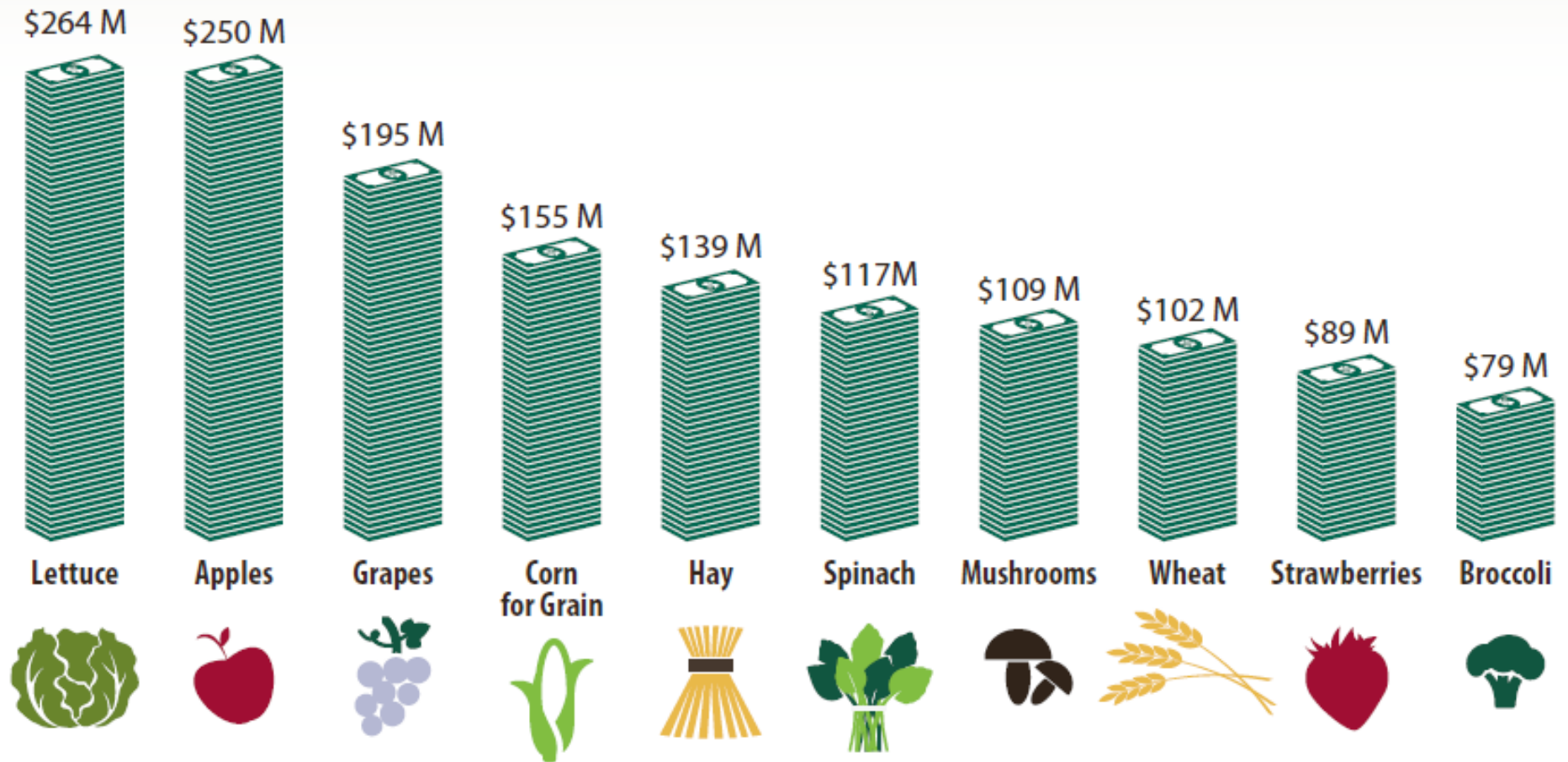
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# U.S. Top 10 Organic Crops by Sales, 2014



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## Top States in Organic Livestock and Poultry Product Sales 2014

| Top Organic Livestock and Poultry Product States | Organic Livestock and Poultry Product Sales (million dollars) | US Total Organic Livestock and Poultry Product Sales (percent) |
|--|---|--|
| California                                       | 301   | 20   |
| Wisconsin  | 127   | 8  |
| Pennsylvania                                     | 110   | 7  |
| Texas  | 103   | 7  |
| New York   | 95  | 6  |
| <b>US Total</b>                                  | <b>1,504</b>  |  |

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## Organic Livestock and Poultry Product Sales by Top Commodities, 2014

| Category                       | Commodity Sales<br>(million dollars) |
|--------------------------------|--------------------------------------|
| Livestock and poultry products | 1,504                                |
| Milk                           | 1,082                                |
| Eggs                           | 420                                  |

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## Top Published States in Organic Livestock and Poultry Sales 2014

| Top Organic Livestock and Poultry States | Organic Livestock Sales (million dollars) | US Total Organic Livestock Sales (percent) |
|--|---|--|
| California                               | 271                                       | 41   |
| Pennsylvania                             | 112                                       | 17   |
| Wisconsin                                | 25  | 4  |
| Texas                                    | 18  | 3  |
| Oregon                                   | 18  | 3  |
| <b>US Total</b>                          | <b>660</b>                                |  |

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## Organic Sales by Top Commodities, 2014

| Category                           | Commodity Sales<br>(million dollars) |
|------------------------------------|--------------------------------------|
| <b>Livestock and poultry sales</b> | <b>660</b>                           |
| Broilers                           | 372                                  |
| Other Cattle                       | 131                                  |
| Milk Cows                          | 69                                   |
| Turkeys                            | 50                                   |
| Beef Cows                          | 16                                   |

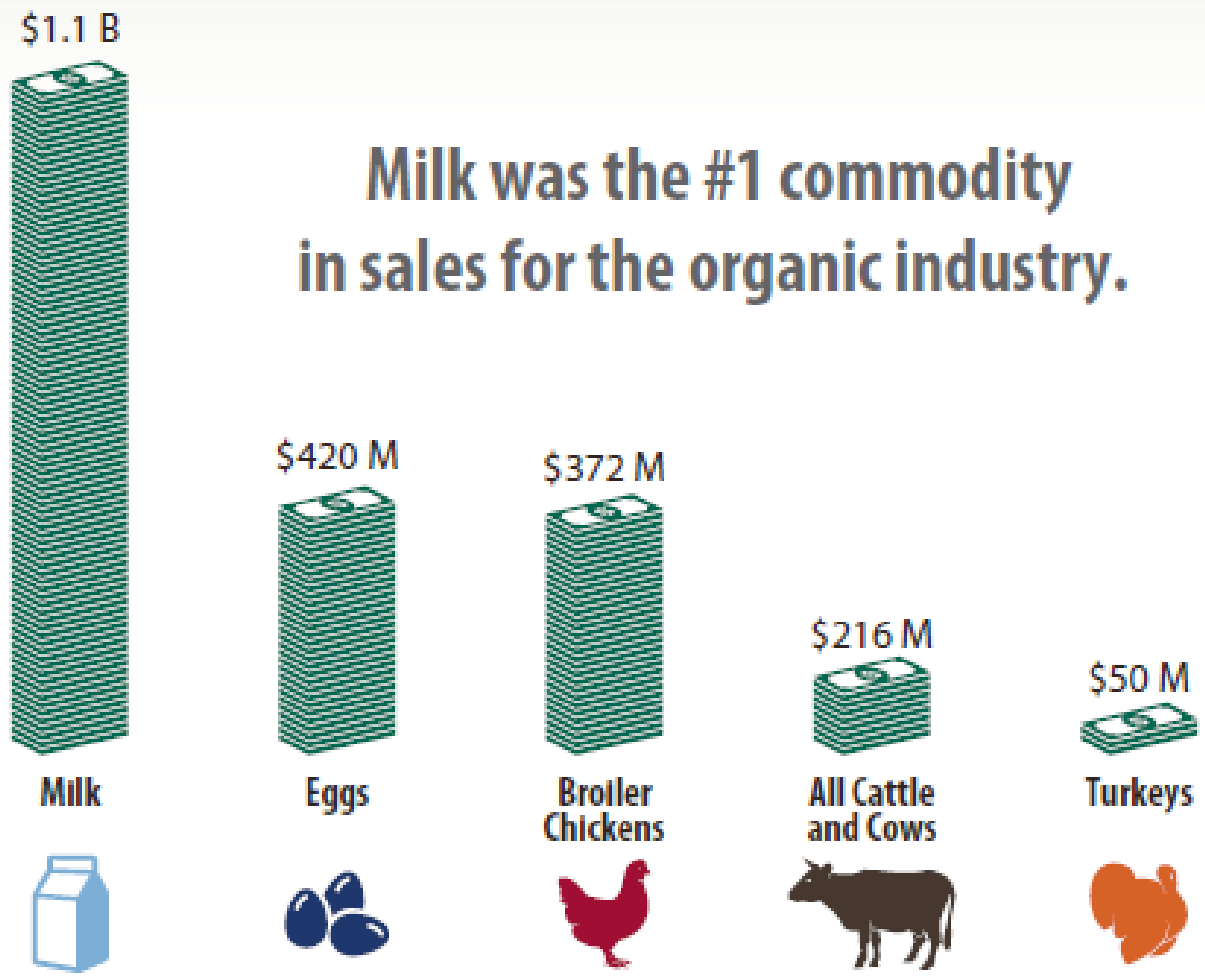
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# U.S. Sales of Livestock, Poultry and Products, 2014



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Source: USDA NASS 2014 Organic Survey

# Organic Sales by Type of Sale, 2008 and 2014

| Marketing Practices                       | 2008 Total Organic Sales (percent) | 2014 Total Organic Sales (percent) |
|---|------------------------------------|------------------------------------|
| Direct to consumers                       | 7                                  | 8                                  |
| Direct to retail markets and institutions | 10                                 | 14                                 |
| Wholesale markets                         | 83                                 | 78                                 |

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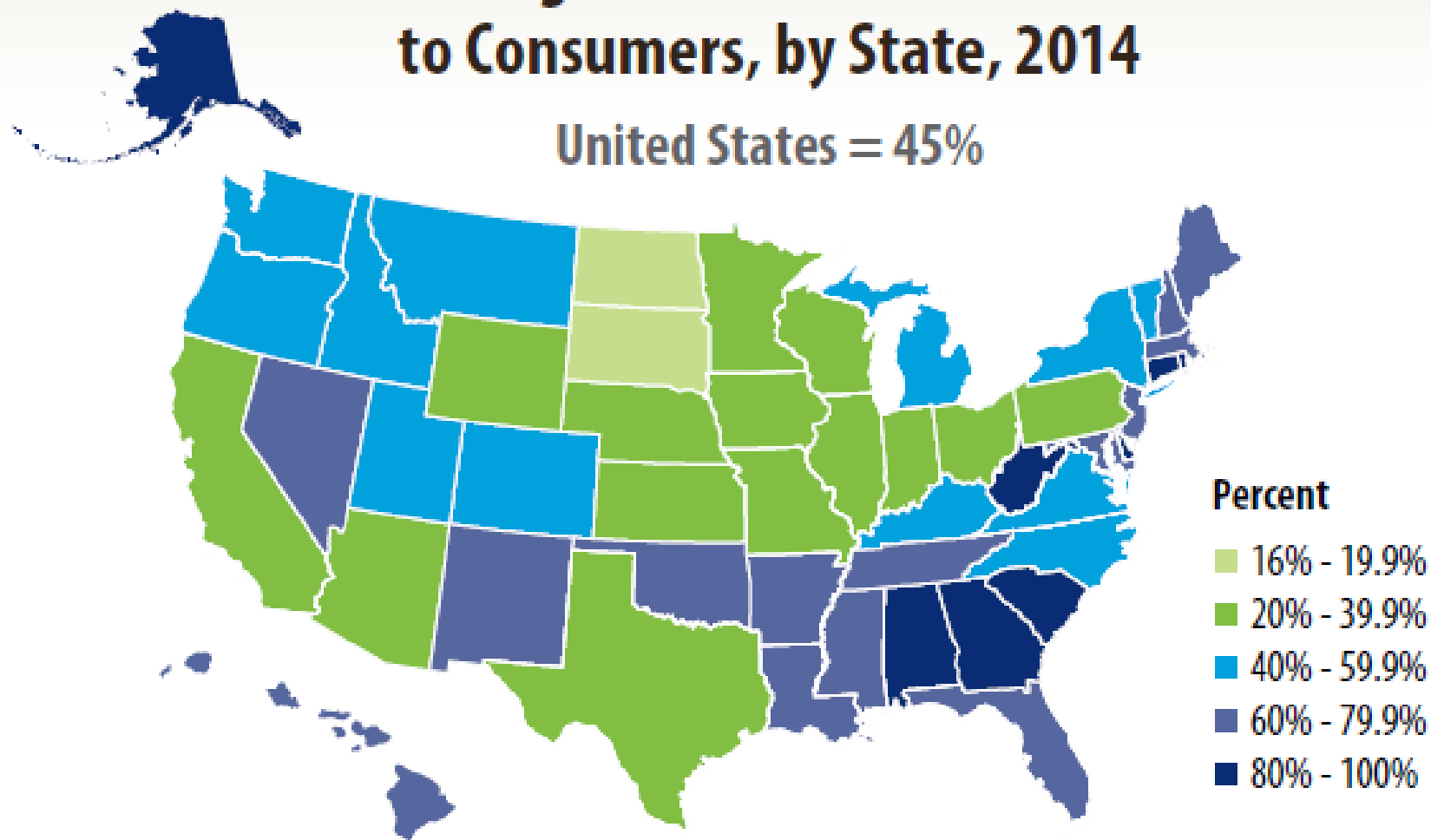
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# Share of Organic Farms with Direct Sales to Consumers, by State, 2014

United States = 45%



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# Organic Sales by First Point of Sale, 2008 and 2014

| Distance from farm of first sale | Farms          |                | Sales          |                |
|----------------------------------|----------------|----------------|----------------|----------------|
|                                  | 2008 (percent) | 2014 (percent) | 2008 (percent) | 2014 (percent) |
| Within 100 miles                 | 72             | 80             | 44             | 46             |
| 100 – 499 miles                  | 25             | 33             | 29             | 34             |
| 500 or more miles                | 13             | 13             | 24             | 18             |
| Internationally                  | 2              | 3              | 2              | 2              |

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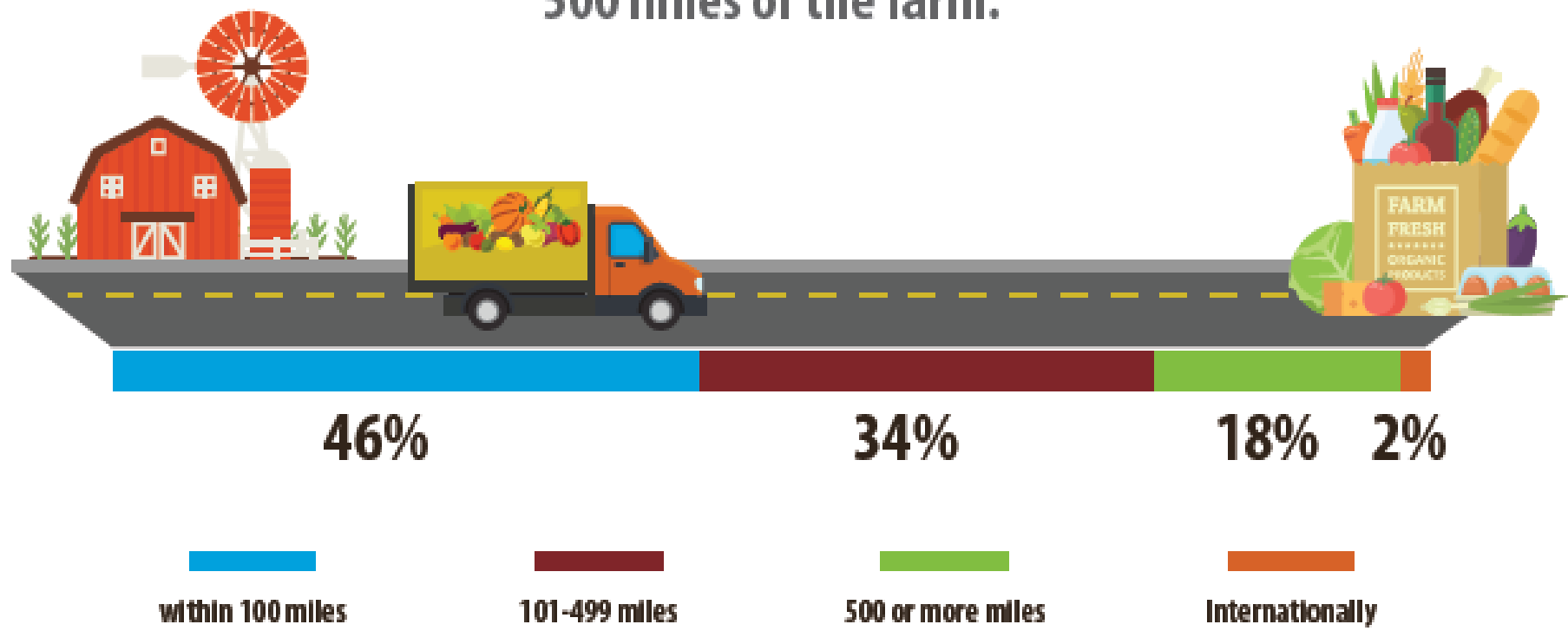
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# Percent of Total Organic Sales by First Point of Sale, 2014

80% of sales are within 500 miles of the farm.



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Source: USDA NASS 2014 Organic Survey

# Organic - Expenses



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# Top Ten Production Expenses, 2008 and 2014

|                                  | 2008 Expenses<br>(million dollars) | 2014 Expenses<br>(million dollars) |
|----------------------------------|------------------------------------|------------------------------------|
| <b>Total Production Expenses</b> | 2,482                              | 3,956                              |
| Feed                             | 480                                | 927                                |
| Hired labor                      | 569                                | 917                                |
| Supplies and repairs             | 175                                | 258                                |
| Cash rent and lease              | 135                                | 219                                |
| Fertilizer                       | 150                                | 204                                |
| Customwork                       | 75                                 | 200                                |
| Gasoline, fuels and oils         | 131                                | 176                                |
| Seeds                            | 114                                | 164                                |
| Utilities                        | 96                                 | 156                                |
| Interest paid                    | 100                                | 112                                |

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# Organic – Production Practices



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# Production Practices Used by Organic Farms, 2008 and 2014

| Production Practices                     | 2008 Organic farms that use this practice (percent) | 2014 Organic farms that use this practice (percent) |
|--|---|---|
| Green or animal manure                   | 65  | 67  |
| Buffer strip to isolate organic products | 58  | 66  |
| Water management practices               | 51  | 53  |
| Organic mulch/compost                    | 51  | 50  |
| No-till or minimum till cropping         | 38  | 41  |
| Planting location planned to avoid pests | 35  | 38  |

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# Production Practices Used by Organic Farms, 2008 and 2014

| Production Practices  | 2008 Organic farms that use this practice (percent) | 2014 Organic farms that use this practice (percent) |
|---|---|---|
| Crop variety for pest resistance chosen for pest resistance                       | 33  | 36  |
| Maintain beneficial habitat for insects or vertebrates to manage pests or disease | 32  | 34  |
| Biological pest management  | 31  | 34  |
| Choosing planting dates to avoid presence of unintended materials                 | 26  | 29  |
| Practice rotational grazing   | 21  | 22  |
| Beneficial organisms applied or released  | 16  | 18  |
| Free range grazing  | 16  | 15  |

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# Economic Losses Due to GMO Presence

- For the years 2011-2014, organic crop losses due to GMO material were \$6.1 million.

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# Survey Report Release

- Additional information can be found in a published report available as a PDF on NASS' website and in NASS' online database [Quick Stats](#).
- For more information on the Organic Survey and the Census of Agriculture, go to:
  - [agcensus.usda.gov/Publications/Organic\\_Survey/](http://agcensus.usda.gov/Publications/Organic_Survey/)

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# NASS Organic Program

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