

# 2019 Organic Survey <br> Data Release <br> 10/22/20 

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## History

- The 2019 Organic Survey is the sixth 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 Survey collected data from certified organic operations only.
- The 2014 Organic Survey was a census of all known U.S. farms and ranches with certified, exempt, and transitioning land.
- The 2015 and 2016 Organic Surveys were a census of all known U.S. farms and ranches that had certified organic production.


## 2019 Organic Survey

- The 2019 Organic Survey was a census of all known operations with certified or transitioning organic production in the United States in 2019.
- The sources for the sampling frame were the 2017 Census of Agriculture, the 2016 Certified Organic Survey, the 2019 Agricultural Marketing Service (AMS) certified organic list, and sources supplied by Regional Field Offices (RFOs).
- All states were included in the survey.


## Timeline

- Planning - January 2019 - November 2019
- Data Collection - December 2019 - June 2020
- Data Analysis - June 2020 - September 2020
- Data Release - October 22, 2020


## Forms By Mode of Data Collection



## Organic Farms and Land

## Certified Organic Farms and Land, 2008-2019

|  | 2008* Organic Survey | $2014$ <br> Organic Survey | $\begin{gathered} 2016 \\ \text { Organic Survey } \end{gathered}$ | 2019 Organic Survey |
| :---: | :---: | :---: | :---: | :---: |
| Farms | 10,903 | 12,634 | 14,217 | 16,585 |
|  |  |  |  |  |
| Organic land (1,000 acres) | 4,004 | 3,643 | 5,019 | 5,495 |
| Cropland | 2,230 | (NA) | 2,714 | 3,517 |
| Pasture/Rangeland | 1,848 | (NA) | 2,305 | 1,974 |

*Includes land on exempt farms
(NA) not available

## Top States in Organic Farms, 2016 and 2019

|  |  |  |
| :--- | ---: | ---: |
|  | 2016 | 2019 |
| California | 2,713 | 3,012 |
| Wisconsin | 1,276 | 1,364 |
| New York | 1,059 | 1,321 |
| Pennsylvania | 803 | 1,048 |
| Ohio | 575 | 785 |
| lowa | 732 | 779 |
| Washington | 677 | 745 |
| Vermont | 556 | 655 |
| Minnesota | 545 | 635 |
| Indiana | 420 | 595 |
| Michigan | 402 | 541 |

## Top States in Organic Land, 2016 and 2019

|  | 2016 (acres) | 2019 (acres) |
| :--- | ---: | ---: |
| California | $1,069,950$ | (D) |
| Alaska | 266,048 | (D) |
| Montana | 264,385 | 355,723 |
| New York | 219,266 | 323,081 |
| Wisconsin | 146,801 | 250,940 |
| Texas | 107,371 | 246,307 |
| Nebraska | 134,336 | 231,833 |
| Vermont | 194,769 | 203,002 |
| Oregon | 178,567 | 196,045 |
| Idaho | 130,688 | 180,732 |
| Minnesota |  | 172,968 |

(D) Withheld to avoid disclosing data for individual operations.

## Organic Sales

## Market Value of Certified Organic Products Sold, 2016 and 2019

|  | 2016 <br> (\$ million) | 2019 <br> (\$ million) | \% change |
| :--- | ---: | ---: | ---: |
| Total Sales | 7,554 | 9,926 | 31 |
|  |  |  |  |
| Crops | 4,193 | 5,787 | 38 |
| Livestock and poultry | 1,157 | 1,663 | 44 |
| Livestock and poultry products | 2,205 | 2,476 | 12 |

## Top States in Organic Sales, 2019



| State | Sales <br> (\$ million) |
| :--- | ---: |
| California | 3,597 |
| Washington | 886 |
| Pennsylvania | 742 |
| Oregon | 454 |
| Texas | 424 |
| North Carolina | 370 |
| New York | 298 |
| Wisconsin | 269 |
| Michigan | 231 |
| Idaho | 206 |

## Top States in Organic Crop Sales, 2016 and 2019

|  | 2016 (\$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| California | 2,129 | 2,874 |
| Washington | 533 | 717 |
| Oregon | 217 | 323 |
| Pennsylvania | 84 | 124 |
| Texas | 73 | 112 |
| New York | 52 | 105 |

Top published states only

## Crop Sectors by Sales, 2016 and 2019

|  | 2016 (\$ million) | 2019 (\$ million) | \% change from 2016 |
| :--- | ---: | ---: | ---: |
| Crop Total | 4,193 | 5,787 | 38 |
|  |  |  |  |
| Vegetables in the open | 1,644 | 2,084 | 27 |
| Fruits, berries, and tree <br> nuts | 1,407 | 2,023 | 44 |
| Field crops | 763 | 1,180 | 55 |
| Mushrooms | 111 | 161 | 45 |
| Vegetables under <br> protection | 89 | 133 | 49 |
| Nursery, floriculture and <br> propagative materials | 113 | 115 | 2 |
| Maple syrup | 65 | 91 | 39 |
| Christmas trees | $<1$ | $<1$ | 345 |

## U.S. Top 10 Organic Crops by Sales, 2019



## Top Crop Commodities in Sales, 2016 and 2019

|  | 2016 (\$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| Apples | 327 | 475 |
| Lettuce | 277 | 400 |
| Grapes | 218 | 332 |
| Strawberries | 242 | 321 |
| Corn for grain | 164 | 278 |
| Blueberries, cultivated | 100 | 205 |
| Spinach | 118 | 179 |
| Mushrooms | 111 | 161 |
| Potatoes | 151 | 155 |
| Alfalfa hay | 107 | 154 |

## Top Vegetable Commodities in Sales, 2016 and 2019

|  | 2016 (\$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| Lettuce | 277 | 400 |
| Spinach | 118 | 179 |
| Potatoes | 151 | 155 |
| Tomatoes | 175 | 132 |
| Carrots | 88 | 132 |
| Onions | 34 | 113 |
| Broccoli | 71 | 109 |
| Sweet potatoes | 101 | 77 |
| Cauliflower | 32 | 68 |
| Celery | 38 | 65 |

## Major Fruit Categories by Sales, 2016 and 2019

|  | 2016 (\$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| Fruits, tree nuts and berries | 1,407 | 2,023 |
| Berries | 406 | 676 |
| Apples | 327 | 475 |
| Grapes | 218 | 332 |
| Other fruits | 254 | 314 |
| Citrus | 123 | 116 |
| Tree nuts | 79 | 110 |

## Top Fruit Commodities in Sales, 2016 and 2019 (including berries and tree nuts)

|  | 2016 (\$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| Apples | 327 | 475 |
| Grapes | 218 | 332 |
| Strawberries | 242 | 321 |
| Blueberries, cultivated | 100 | 205 |
| Raspberries | 31 | 92 |
| Dates | 61 | 80 |
| Blackberries | 26 | 50 |
| Lemons | 57 | 40 |
| Oranges | 42 | 37 |
| Peaches | 28 | 36 |

## Top Field Crops Commodities in Sales, 2016 and 2019

|  | 2016 (\$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| Corn for grain | 164 | 278 |
| Alfalfa hay | 107 | 154 |
| Wheat | 107 | 149 |
| Soybeans | 78 | 109 |
| Rice | 43 | 44 |
| Tobacco | 43 | 39 |
| Peanuts | 62 | 38 |

## U.S. Livestock and Poultry Products and Sales, 2019

\$1.1 B
Broiler Chickens

\$1.6 B


Milk



## Milk was the \#1 commodity in sales for the organic industry.


\$293 M


Cattle
$\$ 139$ M


Turkeys



## Top Livestock, Poultry, and Product Commodities in Sales, 2016 and 2019

|  | 2016 (\$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| Milk | 1,386 | 1,585 |
| Chickens, broilers | 750 | 1,115 |
| Eggs | 816 | 887 |
| Cattle | 233 | 293 |
| Turkeys | 83 | 139 |

## Top States in Organic Livestock and Poultry Sales, 2016 and 2019

|  | 2016 (\$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| Pennsylvania | 387 | 449 |
| California | 378 | 386 |
| North Carolina | 8 | 221 |
| Nebraska | $(\mathrm{D})$ | 108 |
| Indiana | 33 | 79 |
| Washington | 37 | 76 |

(D) Withheld to avoid disclosing data for individual operations.

## Top States in Organic Livestock and Poultry Product Sales, 2016 and 2019

|  | $2016(\$$ million) | 2019 (\$ million) |
| :--- | ---: | ---: |
| California | 382 | 336 |
| Texas | 204 | 277 |
| Pennsylvania | 189 | 169 |
| Wisconsin | 168 | 168 |
| New York | 141 | 163 |
| Michigan | 139 | 129 |
| Idaho | 40 | 125 |
| Oregon | 117 | 111 |

## Organic Practices

## Organic Marketing Practices, 2019

|  | Number of farms | (\$ million) |
| :--- | ---: | ---: |
| Direct to consumer | 2,993 | 300 |
| Direct to retail markets and institutions | 3,196 | 2,035 |
| Sales of value-added products | 1,318 | 727 |

## Share of Organic Farms with Direct Sales to Consumers, by State, 2019

United States = 18\%


## Organic Production Practices, 2014 and 2019

| Production Practice | Organic farms using practice, 2014 | Organic farms using practice, 2019 |
| :---: | :---: | :---: |
| Used buffer strips or border rows to isolate organic from conventional crops | 8,658 | 10,796 |
| Applied animal manures | (NA) | 9,160 |
| Used water management practices | 6,695 | 7,880 |
| Planted green manures (cover crops plowed under) | (NA) | 7,564 |
| Used no-till or minimum till practices | 4,881 | 5,970 |
| Produced or used organic mulch/compost | 5,962 | 5,737 |

Production practice questions did not appear on the 2016 survey.
(NA) not available

## Number of Farms Reporting Crop Economic Losses, 2019 and earlier years

| Year | Unintended presence of <br> GMO material (farms) | Unintended presence of <br> non-NOP approved pesticides (farms) |
| :--- | ---: | ---: |
| In 2019 | 125 | 142 |
| In 2018 | 115 | 145 |
| Prior to 2018 | 316 | 280 |
| No loss | 15,248 | 15,339 |
| Don't know | 898 | 777 |

## Selected Production Expenses, 2019

|  | \$ million |
| :--- | ---: |
| Organic certification | 47 |
| Certified organic feed | 1,944 |
| Food safety related | 30 |
| Hired and contract agricultural labor | 1,584 |
| Seed, annual seedlings, and planting stock | 669 |
| Organic | 340 |
| Non-organic | 329 |

## Major Challenges for Certified Organic Farms, 2019

|  | Number of farms | \% of farms |
| :--- | :--- | :--- |
| Regulatory | 7,690 | 54 |
| Price issues | 5,423 | 38 |
| Production problems | 5,551 | 39 |
| Market access | 4,204 | 30 |
| Management issues | 3,916 | 28 |
| Other | 3,024 | 21 |

## Future Production Plans for Certified Organic Farms, 2019

$\left.\begin{array}{|l|l|}\hline & \\ \hline & \text { \% of farms } \\ \hline \text { Increase organic production } & \\ \hline \text { Maintain current level of organic } & \\ \hline \text { production }\end{array}\right) 44$

## Transitional Land - Certified Farms

|  | 2008 <br> Organic Survey |  | 2014 <br> Organic Survey |
| :--- | ---: | ---: | ---: |
| Certified farms with <br> transitional land | 1,397 | 1,272 | 2019 <br> Organic Survey |
| Transitional land (acres) | 185,796 | 119,458 | 1,857 |
| Cropland | $(\mathrm{NA})$ | 110,791 | 255,060 |
| Pasture/Rangeland | $(\mathrm{NA})$ | 8,667 | 223,774 |

Data on transition acres was not collected in the 2016 Survey.
(NA) not available

## Transitional Land - Other Farms (not currently certified)

|  | 2008 Organic Survey | 2014 Organic Survey | $2019$ <br> Organic Survey |
| :---: | :---: | :---: | :---: |
| Not currently certified farms with transitional land | 2,440 | 781 | 710 |
| Transitional land (acres) | 206,500 | 53,405 | 60,611 |
| Cropland | (NA) | 26,769 | 39,649 |
| Pasture/Rangeland | (NA) | 26,636 | 20,962 |

Data on transition acres was not collected in the 2016 Survey.
(NA) not available

## Other Information

## Organic Farms by Sales Class, 2019

| Sales Class | \% of farms | \% of sales |
| :--- | ---: | ---: |
| $<\$ 10,000$ | 11 | 0.1 |
| $\$ 10,000-\$ 99,999$ | 38 | 3 |
| $\$ 100,000-\$ 249,999$ | 22 | 6 |
| $\$ 250,000-\$ 499,999$ | 12 | 7 |
| $\$ 500,000+$ | 17 | 84 |

## 2019 Organic Survey and 2017 Census of Agriculture

|  | 2016 <br> Certified Organic <br> Survey | 2017 <br> Census of Agriculture | 2019 <br> Organic Survey |
| :--- | ---: | ---: | ---: |
| Certified organic farms | 14,217 | 15,951 | 16,585 |
| Organic sales certified <br> organic farms (\$ million) | 7,554 | 7,273 | 9,926 |

## Certified Organic Producer Demographics 2017 Census of Agriculture

|  | Percent of certified <br> organic producers <br> (Producers = 30,909) | Percent of all U.S. producers <br> (Producers = 3,399,834) |
| :--- | ---: | ---: |
| Age of producers | 19 |  |
| $<35$ | 61 | 8 |
| $35-64$ | 20 | 58 |
| $65+$ | 34 | 34 |
| New/beginning | 5 | 27 |
| Served in military |  | 69 |
| Primary Occupation | 69 | 11 |
| Farming | 31 | 42 |
| Other |  | 58 |

## Certified Organic Producer Demographics 2017 Census of Agriculture (continued)

|  | Percent of certified <br> organic producers <br> (Producers = 30,909) | Percent of all <br> U.S. producers <br> (Producers = 3,399,834) |
| :--- | ---: | ---: | ---: |
| Sex of producers | 65 |  |
| Male | 35 | 64 |
| Female | 4 | 36 |
| Hispanic |  | 3 |
| Race | 0.4 | 1.7 |
| American Indian/Alaska Native | 1.7 | 0.6 |
| Asian | 0.5 | 1.3 |
| Black | 0.2 | 0.1 |
| Native Hawaiian/Pacific Islander | 96.4 | 95.5 |
| White | 0.8 | 0.8 |
| More than one race reported |  | 0.6 |

## Survey Release

- Additional information can be found in a published report available as a PDF file on the NASS website and in the NASS online database Quick Stats
- For more information on the 2019 Organic Survey and past organic survey results, go to:
https://www.nass.usda.gov/organics



## All Organic Reports Available At www.nass.usda.gov/organics

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