

# Organic Vegetable Trends 2017

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In cooperation with  
WSDA Organic Food Program  
and WSTFA

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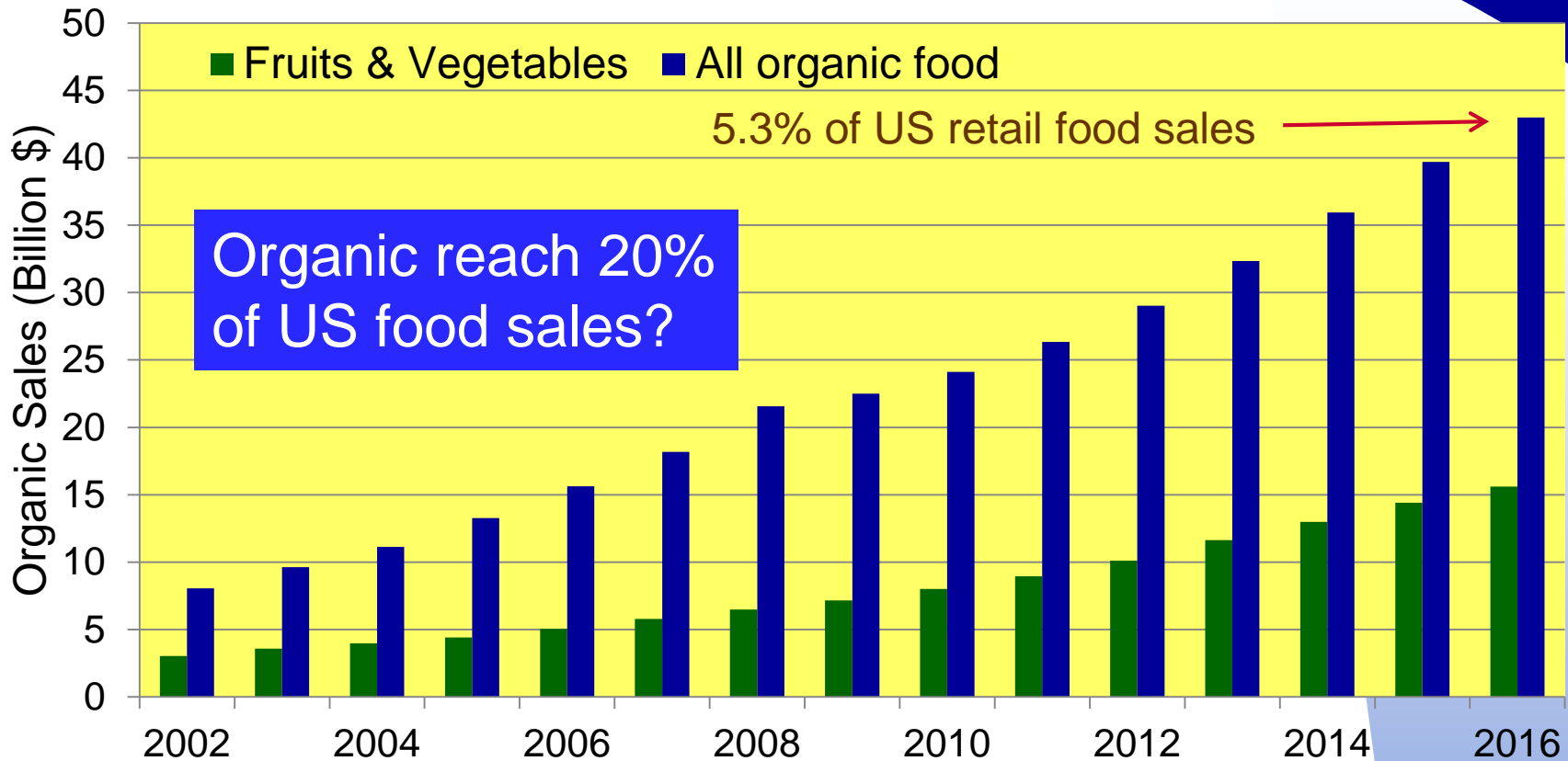


# Consumer Trends

Steady growth for 3 decades – **82%** of US households purchase organic products!

# Consumer Demand

## Growth of US Organic Food Sales

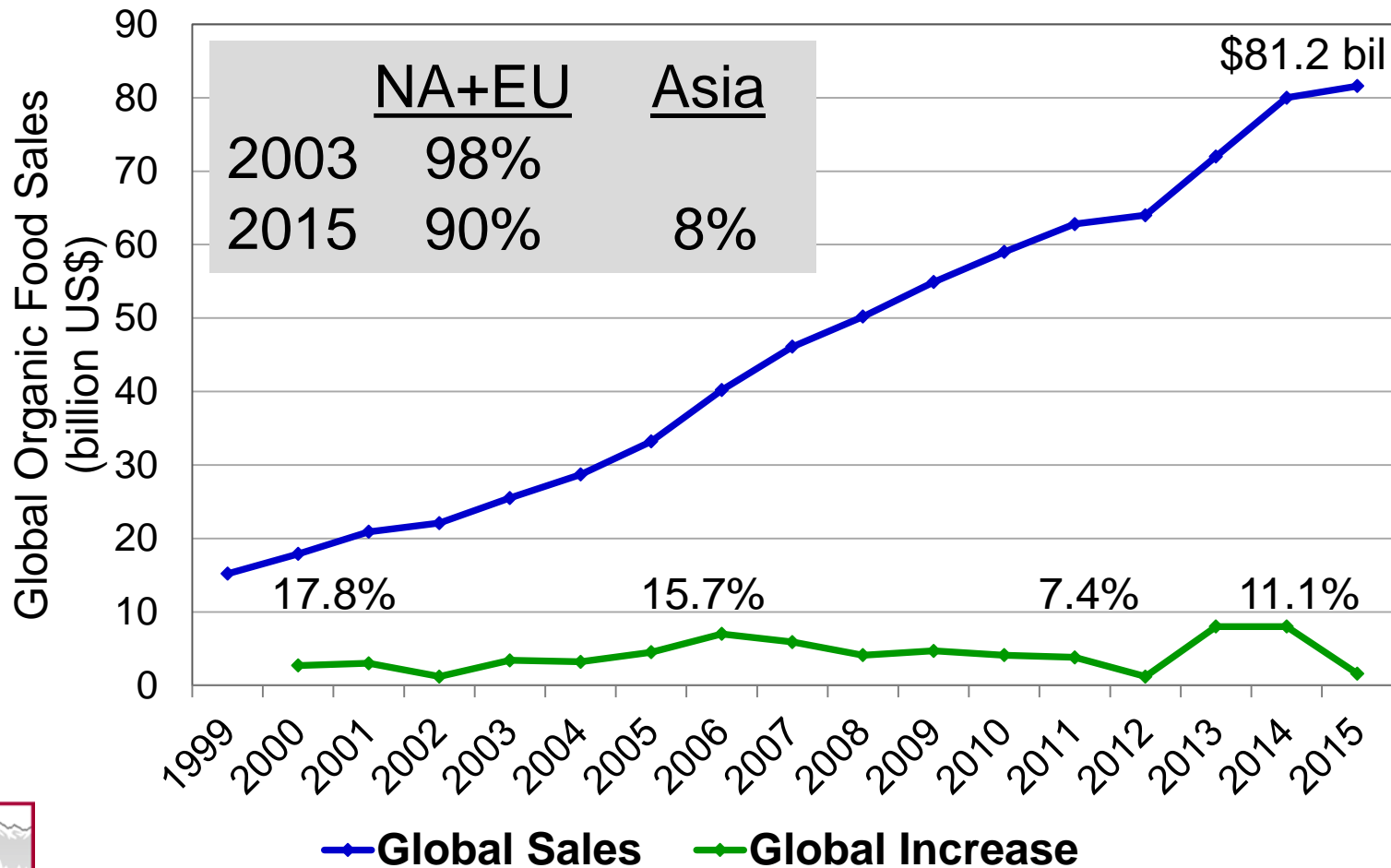


Retail organic food sales increased **8.4%** in 2016. Same for organic produce, vs 3.3% for all produce sales growth.

Organic fruits and vegetables **36%** of all organic food sales.



# Consumer Demand for Organic Food



Growth Rate



# OTA State of Organic Produce

June 2016

Organic produce sales growth since 2011

- **Fruit**            **+123%**
- **Veggies**        **+92%**
- **Other**            **+94%**

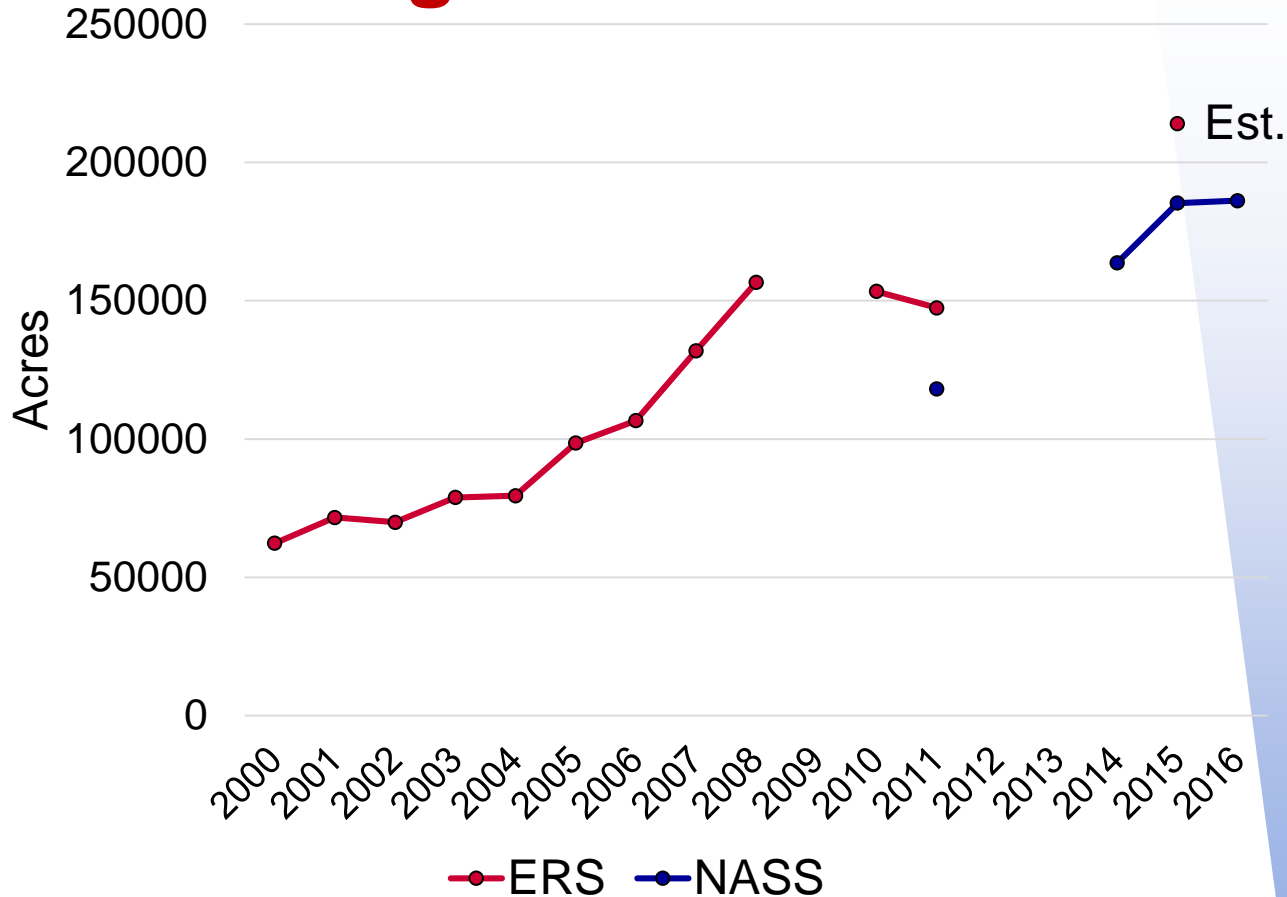
\$5.7 bil    +    \$4.7 bil    +    \$2.6 bil    =    \$13 bil total  
Mass            Natural            Direct            organic  
market            foods            sales            produce

For 2015,

**Produce:** +2.9% volume, +4.0% sales

**Frozen:** -1.6% volume, +1.2% sales

# US Organic Vegetable Acres

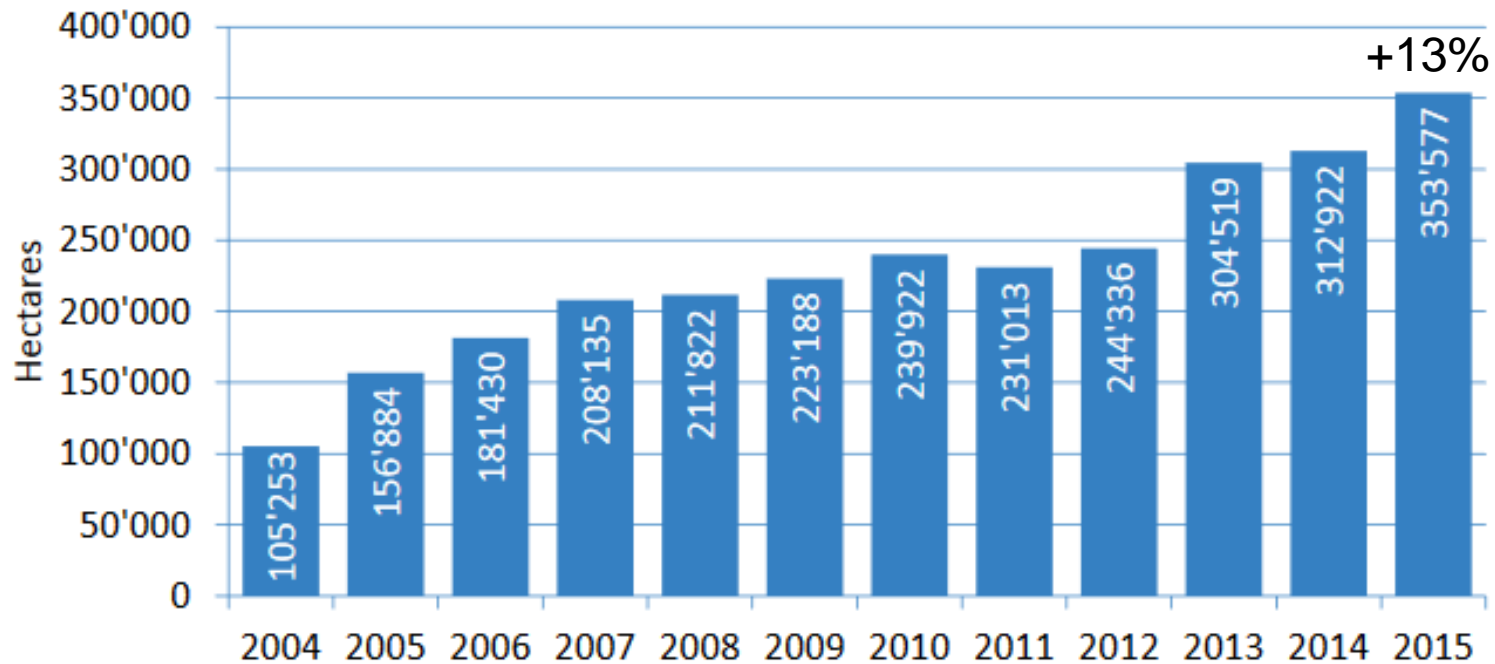


The ERS numbers are based on data collected directly from certifiers. The NASS numbers are from survey results for which participation rate was generally 60%, but values were extrapolated.

# World Organic Vegetable Area

2015

- organic is 0.6% of global vegetable area
- US = 75,000 ha, 21% of global area



**Figure 46: Vegetables: Development of the global organic area 2004-2015**

## Major Organic Vegetable Producers, 2015

	<u>Ha cert</u>
US	75,030
China	38,086
Poland	31,330
Italy	22,859
France	15,702
Canada	14,488

No data for India, Nigeria which are top vegetable producers.



## US Organic Vegetable Trends - 2016

2.7 million acres cropland (*up 12%*)

US organic crop sales **\$4.19 billion** (*up 19%*)

US organic vegetable sales **\$1.64 billion** (*up 20%*)

### Farmgate sales, org. veg.:

US - \$1361.7 million	39% of all US org. crop sales
CA - \$1052.4 million	77% of US
WA - \$ 98.8 million	7% of US
OR - \$ 104.4 million	8% of US
ID - \$ 11.8 million	1% of US

US organic veg: 186,178 ac (8% of org. cropland)

# Organic Vegetable Trends 2016

	US	CA	OR	WA
Org veg acres	186,178	108,056	12,372	17,157
% of US veg acres		58	6	9
Veg % of org cropland	8	32	11	27
Veg \$, % of org crop \$	39	49	48	19
Est. \$/ac gross revenue	8,833	9,739	8,436	5,761

# WA Organic Vegetables Share of Total US Organic

	% of acres	% of prod.	% of sales
Vegetables, all	9	--	7
Onion, all	26	42	25
Pea, green	46	45	53
Potato	11	23	19
Sweet corn	54	53	53
CA veg	58	--	77

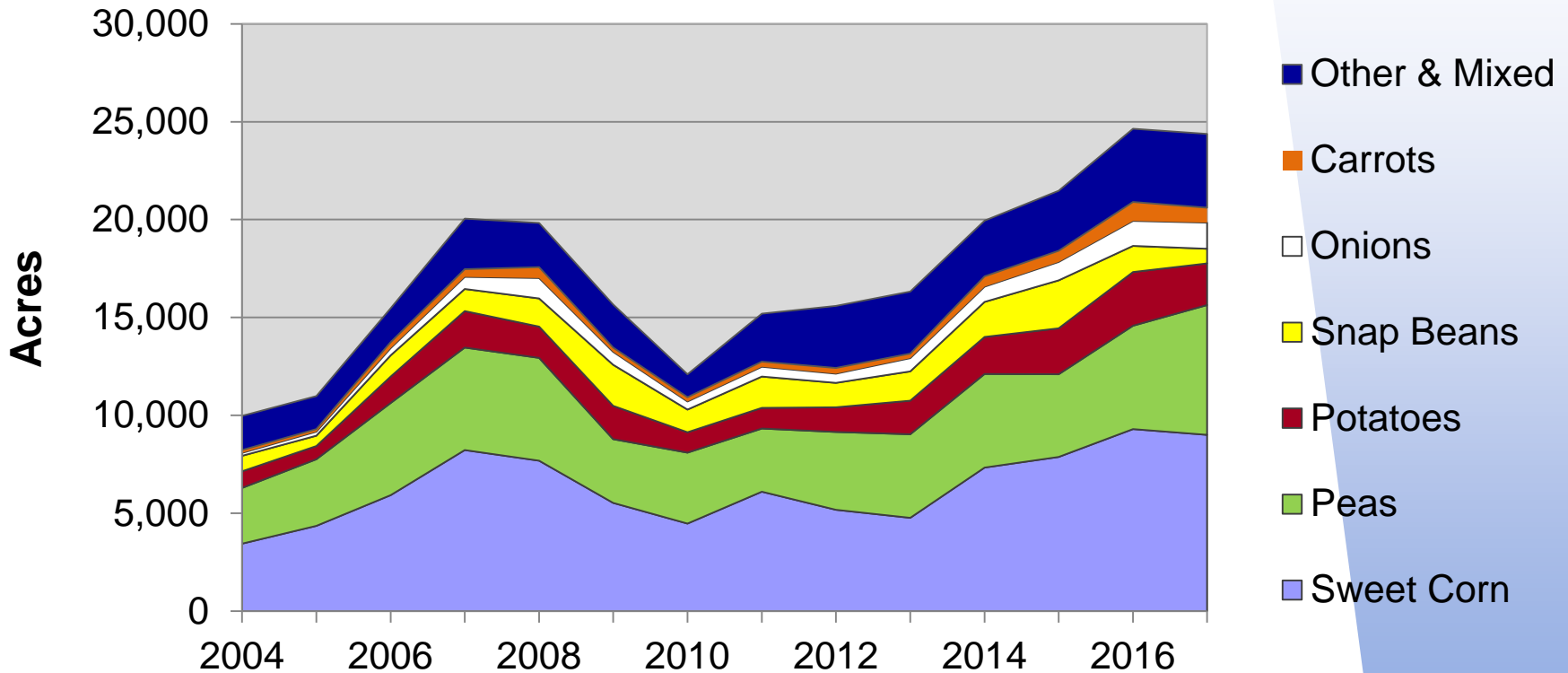
*Source: USDA-NASS, 2017*

# WA Organic Vegetable Area

	2008		2014		2015		2016	
	Rank	% US	Rank	% US	Rank	% US	Rank	% US
Sweet corn	1	>63	1	52	1	51	<b>1</b>	<b>55</b>
Green peas	1	49	1	50	1	26	<b>1</b>	<b>46</b>
Snap beans	1	32	1	30?	1	43	<b>?</b>	<b>?</b>
Onion	2	35	1-2	16	1	44	<b>1?</b>	<b>26?</b>
Carrot	2	8	2	4	2	?	<b>2</b>	<b>3</b>
Potato	3	18	3	20	1	27	<b>4</b>	<b>11</b>
Squash	4	3	3?	?	3	12	<b>4</b>	<b>8</b>
Other	3	8	2	33	3	7	<b>2</b>	<b>9</b>
Total Acres	14,153 (19,836)		13,690 (20,063)		15,757 (21,474)		<b>17,157 (24,372)</b>	

# Organic Vegetable Acres Washington State

Reported 2017 certified vegetables = 24,372 acres  
 (2017 preliminary; WSDA only)



# WA Organic Vegetable Area

	2017 Ac (C)	% change from 2016
All Veg	24,327	+7
Asparagus	284	+73
Carrot	759	-26
Corn, sweet	9,000	+9
Green bean	747	-28
Onions	1,341	+8
Peas	6,640	+22
Potato	2,116	-5
Pumpkin	463	+146
Squash	560	-41

Preliminary WSDA data only

# Farmgate Value of Organic Vegetables in WA

	2008	2009	2010	2011	2012	2014	2015	2016
	----- Million \$ -----							
Sweet corn	4.6	4.77	4.74	7.42	7.09	14.9	17.5	14.4
Green pea	4.2	2.65	2.31	3.85	4.27	11.3	15.0	15.7
Snap bean	3.6	--	--	2.17	--			
Onion	8.2	2.92	3.69	3.55	4.87		7.8	8.6
Potato	4.3	5.26	3.91	3.45	6.67	8.7	9.4	28.3
Total	33.4	31.6	32.2	35.9 45.7 <sup>a</sup>	37.6	59.7	62.7	98.8

<sup>a</sup> from 2011 NASS COPS

\*WSU numbers based on WSDA data; 2012 only includes sales thru December for that year's crop  
2014-2016, USDA-NASS data

# Est. WA Organic Vegetable Yields

	Onion	Potato	Sweet Corn	Green Pea	Green Bean
	Ton/ac	Ton/ac	Ton/ac	Lb/ac	Lb/ac
2009	28.6	17.5	11.4	3,414	(d)
2010	36.5	21.3	7.5	4,048	(d)
2011	31.7	19.8	7.7	4,773	8,137
2012	29.4	18.6	na	4,258	(d)
Mean	<b>31.5</b>	<b>19.3</b>	<b>8.9</b>	<b>4,123</b>	--
NASS	30.8	30.3	10.3	6,107	8,500
			(based on WSDA data above)		
2014		27.1	8.3	6,440	
2015		28.9	9.5	3,000	
2016	32.6	28.5	6.3	3,580	

(based on NASS data above)



# Organic Vegetable Yields 2016

	US	WA	OR	CA	Other
	Tons/ac				
Sweet corn	6.4	6.3	8.1		5.8 WI
Green pea	1.82	1.79			1.35 WI
Onion	20.2	32.6		18.3	
Potato	13.6	28.5	12.5	8.0	14.4 CO
Carrot	11.9	23.2		10.4	
Broccoli	5.7	3.5	2.4	5.8	7.8 AZ
Cabbage, gr	10.7	6.7	5.8	13.2	10.5 NY
Cauliflower	7.0	1.8	3.0	7.4	5.4 AZ
Lettuce	4.8	4.8	4.8	4.8	4.4 AZ

Source: USDA-NASS, 2017

## On the horizon...

- Confusion with non-GMO, other labels
- Organic in-fighting – purists, economic organic, large vs small, ...
- Organic fraud and loss of consumer trust
  - fraudulent organic grain from Turkey
- USDA, Congress intentions not clear
  - resignation of NOP director
- New 'organic plus' labels – regenerative organic by Rodale



# Thank You !!



**Organic statistics**

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

**USDA-NASS organic web pages**