

Organic Vegetables

Organic Area Continues to Trend Higher

The National Agricultural Statistics Service (NASS) of USDA released its latest survey of national organic food production in October. The first organic survey was initiated in 2008 and was conducted as part of the Census of Agriculture as a special study. The 2008 and 2014 surveys collected data from certified and exempt organic operations, while all other surveys (including the 2011 and 2019 surveys) collected data only from certified organic operations.

Table 25. Certified organic vegetables: U.S. farms, area, and production, 2011 and 2019¹

Commodity	2011			2019			Change		
	Farms	Area ²	Quantity	Farms	Area ²	Quantity	Farms	Area	Quantity
	<i>Number</i>	<i>Acres</i>	<i>Cwt</i>	<i>Number</i>	<i>Acres</i>	<i>Cwt</i>	<i>Percent</i>		
All vegetables	1,998	118,071	NA	3,300	224,122	NA	65.2	89.8	NA
Lettuce, all	810	22,673	2,466,424	1,129	38,525	6,086,142	39.4	69.9	146.8
Tomatoes, field	928	5,997	3,125,274	1,238	10,751	5,869,683	33.4	79.3	87.8
Potato, table	732	9,088	2,379,491	886	23,612	3,948,714	21.0	159.8	65.9
Carrots	485	9,802	1,504,233	961	11,959	3,503,842	98.1	22.0	132.9
Onions, dry bulb	492	3,311	1,385,177	964	7,520	3,300,290	95.9	127.1	138.3
Spinach	311	9,162	582,948	603	23,018	2,015,494	93.9	151.2	245.7
Sweet potatoes	177	4,348	904,826	401	9,130	1,669,935	126.6	110.0	84.6
Celery	114	1,406	536,841	328	3,786	1,540,323	187.7	169.3	186.9
Broccoli, all	444	6,461	743,088	821	11,945	1,418,623	84.9	84.9	90.9
Corn, sweet	311	9,504	1,160,842	497	11,059	1,332,976	59.8	16.4	14.8
Squash	954	4,923	638,080	1,540	7,848	1,178,666	61.4	59.4	84.7
Cauliflower	185	1,751	168,793	450	7,583	1,118,299	143.2	333.1	562.5
Cabbage, all	432	1,534	244,395	970	3,568	762,766	124.5	132.6	212.1
Peppers, bell	502	901	155,410	926	1,779	376,611	84.5	97.4	142.3
Beans, snap	618	4,568	318,596	782	6,513	371,773	26.5	42.6	16.7
Peas, green	274	6,143	319,998	524	9,397	284,100	91.2	53.0	-11.2
Garlic	503	772	66,246	1,047	2,419	152,711	108.2	213.3	130.5
Herbs, fresh-cut	406	3,142	195,793	853	2,047	104,698	110.1	-34.9	-46.5
Artichokes	40	308	28,125	92	432	68,529	130.0	40.3	143.7
Green onions	NA	NA	NA	528	332	29,181	NA	NA	NA
Other vegetables	928	10,228	922,141	1,601	28,150	5,750,699	72.5	175.2	523.6
Pulse/other crops									
Beans, dry edible	118	17,907	285,803	210	26,192	428,208	78.0	46.3	49.8
Chickpeas	NA	NA	NA	31	6,048	105,458	NA	NA	NA
Dry peas and lentils	62	10,379	101,998	NA	30,482	376,055	NA	193.7	268.7
Lentils	NA	NA	NA	44	12,434	101,398	NA	NA	NA
Peas, dry	NA	NA	NA	104	16,666	254,890	NA	NA	NA
Peas, dry Austrian	NA	NA	NA	12	1,382	19,767	NA	NA	NA
Herbs, dried	43	2,988	37,583	43	1,872	33,684	0.0	-37.3	-10.4

Note: NA=not available or applicable. Cwt=hundredweight. 1/ Field-grown only. 2/ Area includes fresh-market and processing.

Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service.

Certified vegetable farms sell through wholesale markets, direct to consumers (Community Supported Agriculture arrangements, farm stands, farmers markets, internet, mail), and via retail markets, local restaurants, and institutions. Farm sales of organic vegetables nearly doubled

between 2011 and 2019 to \$2.1 billion. In 2019, five States accounted for 83 percent of all certified organic vegetable sales, led by California with \$1.4 billion (66 percent). Arizona (6 percent), Oregon (6 percent), Washington (4 percent), and Florida (2 percent), round out the top five States. Arizona is the second leading purveyor of organic vegetables by sales with both area and sales concentrated in 3 crops: lettuce, spinach, and broccoli.

The 2019 survey revealed that area devoted to fresh and processing vegetables certified as organic increased 90 percent since 2011 (table 25). California (60 percent of organic area), Washington (7 percent), Arizona (4 percent), Oregon (4 percent), and Wisconsin (3 percent), were the top 5 states in terms of organic vegetable area. Lettuce, tomatoes, and spinach were the top 3 certified vegetables in terms of acres harvested. The number of farms producing certified organic vegetables increased 65 percent between 2011 and 2019 with farm numbers rising in most states. Texas was the only State with at least 1,000 acres in certified organic vegetables to register a reduction in farms.

Lettuce (of all types) replaced tomatoes as the top certified organic vegetable in 2019 in terms of both volume and value of sales. Lettuce has been the sales leader among organic vegetables for several years, but tomatoes had long been the volume leader. This largely reflects the enduring popularity of bagged salad mixes which has driven growth in romaine and leaf lettuces in general. About one-tenth of U.S. lettuce area is now sold as certified organic.

Organic culture has become an important factor in the spinach industry. About 70,000 acres of spinach is harvested in the United States under all forms of crop culture. Based on the 2019 organic survey, about one-third of this acreage is now certified as organic. This compares with about 15 percent of cauliflower, 11 to 12 percent of carrots and celery, 5 percent of sweet potatoes, and 3 percent of tomato area.

Among reported organically grown field crops, dry edible beans were valued at nearly \$30 million in 2019. Production has risen 50 percent since 2011 to 428 thousand cwt with black beans (44 percent of dry beans) and pinto beans (36 percent) accounting for the majority of dry beans grown organically. Reflecting both rising demand for organics in general and new products featuring pulse crops, organically produced dry pea and lentil output has jumped 269 percent since 2011. About 2 percent of dry pea and lentil area is now produced under organic culture.

Driven by rising interest in Mediterranean, Middle Eastern, and Indian foods, consumption and production of chickpeas (garbanzo beans) has been trending higher. As a result, over 6,000 acres were reported to be certified organic in 2019. Certified organic garbanzo beans

(chickpeas), which were grouped with dry beans in 2011 but are now reported separately, had sales of \$7 million in 2019.

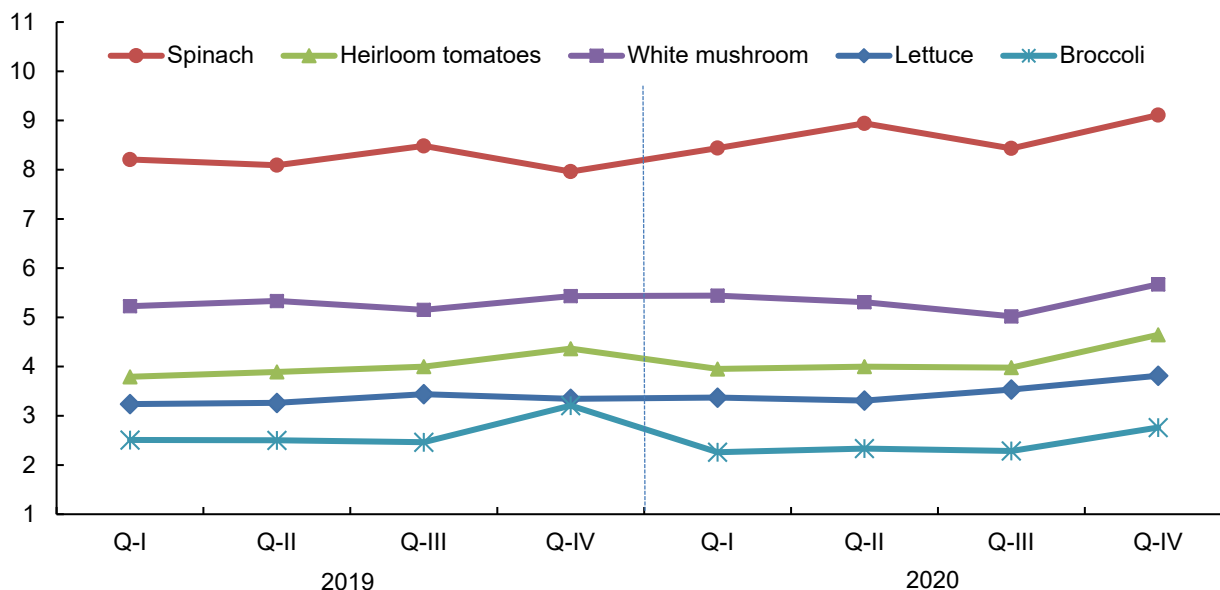
Organic Retail Prices Mixed in 2020

Advertised retail prices for most organic vegetables posted limited increases over the first 3 quarters of 2020 (figure 18). Following the unsettled nature of the market during the early days of the pandemic, market volume for both organic and conventionally grown vegetables settled into a steady pattern with retail sales moving to a higher level. Average advertised retail prices for flat baby spinach (up 4 percent), romaine hearts (up 3 percent), and heirloom round tomatoes (up 2 percent) registered modest gains while prices for broccoli (down 8 percent) and cauliflower (down 4 percent) declined from the weather-induced highs of a year earlier. Despite weathering a period of supply shortages in late spring and early summer, retail prices for white button mushrooms remained steady.

Figure 18

Organic vegetables: Selected advertised quarterly retail prices, 2019-20

Dollars per pound



Source: Compiled by USDA, Economic Research Service from data of USDA, Agricultural Marketing Service, *Market News*.

The advertised retail price premium for many organic vegetables was generally running between 40 percent and 70 percent in November. For example, the advertised retail price for a 1-pound bag of baby peeled organic carrots was selling 58 percent above conventionally produced carrots in November 2020 and were 53 percent higher in November 2019. These higher prices have not been an impediment to sales over the last few years. In general, as per

capita disposable income has risen, consumers have been willing to spend more to acquire premium vegetables (e.g., greenhouse, heirloom varieties) and various organics.