

# California's Organic Agriculture: Diverse and Growing

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California is the leading U.S. state in organic agriculture by value, as it is for conventional agriculture, and accounts for well over a third of national organic production. In 2016, California's farm-level organic revenue reached over \$3.1 billion, increasing to over \$4.1 billion in 2019. Organic farm revenue was more than 8% of California farm revenue in 2019 and much more for some commodities, such as produce, where organic certification is more prevalent.

California is the only state with an organic program approved by the National Organic Program, which operates under the United States Department of Agriculture. The State Organic Program is responsible for regulating organic agricultural production, the processing of organic dairy, meat, and poultry products, and retail organic activities.

Producers, handlers, processors, and wholesalers involved in certified organic products must register with the state annually. We use information collected as part of the registration process to provide a snapshot of California's organic agriculture for the years 2014–2016. Reporting requirements were altered in 2017, eliminating the capacity to provide directly comparable information for later years.

## Value of Organic Production is Concentrated Across Commodities

California farms and ranches produce a wide range of organic commodities—over 360 in 2016. As is the case for California's overall agricultural production, a much smaller set of

commodities accounts for the major share of total value; in 2016, the top 10 organic crops were slightly over a third of total organic farmgate sales value, and the top 20 were just under half (Table 1). Milk was the top-ranked organic commodity, accounting for 8% of total organic sales at \$250 million. Sweet potato sales increased significantly relative to those of other commodities, rising from 20th place in 2014 to 6th in 2016. Processing tomatoes also realized a significant increase in rank. Processing spinach fell considerably, from 4th to 15th.

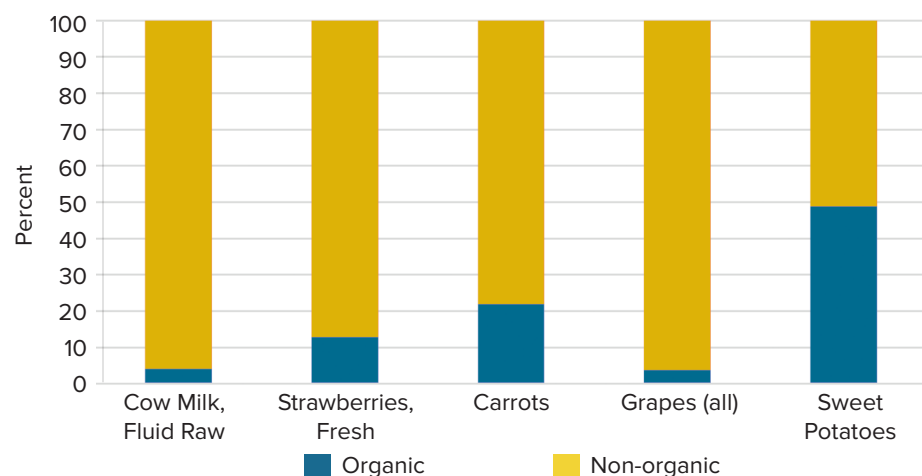
There are distinct similarities between the rankings of organic sales by commodity and overall sales by commodity. The top-ranked crops for California agriculture as a whole in 2016 were milk and cream, grapes (of all kinds), almonds, cattle and calves, and lettuce, followed by strawberries, pistachios, tomatoes, walnuts, and oranges. The noticeable differences in rankings are driven by the larger share of fruits and vegetables in organic production. Carrots, the third-ranked organic commodity, ranked 14th for all agriculture. Organic carrots and sweet

Table 1. Top 20 Organic Commodities by Value (\$1,000)

Farm Commodity	2014		2015		2016	
	Value	Rank	Value	Rank	Value	Rank
Cow Milk, Fluid Raw	189,403	1	222,945	1	250,803	1
Strawberries, Fresh	146,276	2	207,067	2	201,887	2
Carrots	132,240	3	158,609	3	160,810	3
Grapes, Wine	73,700	6	107,736	5	103,947	4
Grapes, Table	92,228	5	112,473	4	76,611	5
Sweet Potatoes	27,510	20	60,250	11	73,971	6
Almonds	47,643	10	62,570	9	72,198	7
Raspberries	56,441	9	102,819	6	68,612	8
Salad Mix	64,821	8	64,889	8	63,598	9
Eggs, Chicken	43,063	14	59,042	12	62,190	10
Tomatoes, Processing	30,527	19	41,506	16	55,631	11
Broccoli	44,394	11	48,840	14	45,617	12
Kale	43,458	13	54,663	13	45,033	13
Lettuce, Romaine	41,985	16	41,170	17	42,685	14
Spinach, Processing	109,259	4	62,463	10	42,182	15
Blueberries	43,835	12	43,533	15	38,657	16
Avocados	39,916	17	29,922	23	37,677	17
Rice	35,791	18	36,585	18	35,738	18
Grapes, Raisins	26,170	23	28,693	24	33,952	19
Lemons	22,115	26	32,128	22	33,719	20

Source: Statistical Review of California's Organic Agriculture: 2013–2016.

**Figure 1. Share of Organic Value of Production in Total, 2016**



Source: Statistical Review of California’s Organic Agriculture: 2013–2016.

**Table 2. Top 10 Counties by Organic Farm-Level Sales Value (\$1,000), 2014–2016**

County	2014	2015	2016
Kern	287,760	355,838	380,692
Merced	159,705	154,735	329,945
Sonoma	242,516	277,312	306,686
Monterey	273,122	359,045	260,161
Fresno	96,395	242,420	249,478
Ventura	114,538	172,071	170,813
Santa Barbara	86,796	119,918	151,281
San Benito	112,537	123,966	131,933
Santa Cruz	113,132	99,503	113,872
San Bernardino	49,329	60,666	105,780

Source: Statistical Review of California’s Organic Agriculture: 2013–2016.

**Table 3. Top 10 Counties by Number of Operations with Organic Sales**

Year	Field Crops	Fruit & Nut Crops	Livestock & Dairy	Nursery	Pasture & Rangeland	Vegetable Crops	At Least One Category
2014	483	1,861	240	162	4	763	2,879
2015	493	1,855	238	172	6	801	3,025
2016	503	1,896	266	170	7	838	3,109

Source: Statistical Review of California’s Organic Agriculture: 2013–2016.

potatoes replaced all cattle and calves and almonds in the top five, when counting all grapes as one commodity. In addition, pistachios and walnuts are absent from the top 20 organic commodities.

The top five ranked organic commodities’ shares of organic production value are much different than their shares for total production value (Figure 1). Compared to other organic commodities, the absolute value of

organic milk production is large; however, it is a small share of total milk production (about 4%). Note that raw fluid cow milk is compared to milk and cream in the statewide figures.

The share of all grapes produced organically is slightly lower than milk’s share. Separating into the three types of grapes, wine grapes have the lowest share of organic production (just under 3%), while table grapes have 5% and raisin grapes have over 8%. In contrast, almost 13% of the value of production for fresh strawberries was accounted for by organic production. A fifth of the value of carrot production was organic, and for sweet potatoes, almost half was organic.

### Value of Organic Production is Concentrated Across Farms

More than 3,100 farms produce organic products, about 4% of all farms in California. However, the value of organic production is concentrated among large farms. Growers selling over \$1 million of organic commodities accounted for 89% of the value of production but only 14% of all registered growers. Another 5% of the value of production was from operations with \$500,000 to \$1 million in organic sales.

### Organic Agriculture Present Statewide

All but one county (Inyo) reported farm-level sales of organic commodities in 2016. However, production is geographically concentrated. The top 10 counties accounted for 70% of sales (Table 2). The top three, Kern, Merced, and Sonoma, together accounted for a third. Kern was also the top-ranked county for the total value of agricultural production in 2016. Merced was fifth, while Sonoma did not reach the top 10. Table grapes and carrots were Kern County’s two most valuable organic crops. Almonds, Kern’s most valuable crop overall, accounted for a negligible share of its organic

production. Sweet potatoes and milk were Merced County's most valuable organic commodities, while milk dominated Sonoma's organic production.

### Organic Growers Concentrated in High-Value Commodities and Coastal Counties

Of the 3,109 farm operations reporting organic sales in 2016, 1,896 (61%) had sales in the high-value fruit and nut category, and 838 (27%) had sales in the high-value vegetable category (Table 3). Only 266 organic operations (9%) sold livestock and dairy. Four individual commodities were sold by over 300 growers: fresh tomatoes, avocados, kale, and summer squash. The total number of operations with any organic sales grew by roughly 10% between 2014 and 2016.

Among the 10 counties with the largest number of operations with organic sales, only Fresno is not located on the coast (Table 4). San Diego County alone is home to 10% of all operations with organic sales, and the top 10 counties account for half of all organic operations. Illustrating how farm revenue per farm differs across the state, San Diego does not reach the top 10 in farm revenue and Kern does not reach the top 10 in numbers of farms.

### Organic Agriculture Since 2016

Based on stakeholder input, in 2017 California reduced the number of commodity categories organic producers reported from several hundred to only six. Starting in 2018, the number of categories was increased to 29. Thus, more recent information from state registrations is not directly comparable on a commodity basis. Overall, organic farm revenue in California has continued to grow, reaching over \$4.09

**Table 4.** Top 10 Counties by Number of Operations with Organic Sales

County	2014	2015	2016
San Diego	318	322	313
Sonoma	224	219	226
Fresno	136	142	154
Riverside	141	147	153
Monterey	138	135	146
Santa Barbara	117	123	126
Humboldt	121	125	123
Santa Cruz	102	116	121
Mendocino	110	108	114
Ventura	97	111	105

Source: Statistical Review of California's Organic Agriculture: 2013–2016.

billion in gross farm revenue in 2019, up by 12% from 2018, as reported by the State Organic Program. The number of producers increased to 5,452. Monterey County organic farm revenue has grown to rival Kern County, which remains the top organic farm county by revenue. Merced, Fresno, and Sonoma counties complete the top five in 2019. As the market for organic foods expands—based on trends to date—California is well-placed to continue to increase organic production and remain the U.S. leader.

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#### For additional information, the authors recommend:

Wei, Hanlin, Rachael Goodhue, Joji Muramoto, and Daniel A. Sumner. 2020. "Statistical Review of California's Organic Agriculture: 2013–2016." Available at: [https://aic.ucdavis.edu/wp-content/uploads/2020/10/CA\\_Organic\\_Report\\_10.21\\_corrected.pdf](https://aic.ucdavis.edu/wp-content/uploads/2020/10/CA_Organic_Report_10.21_corrected.pdf).

California Department of Food and Agriculture, State Organic Program. 2020. "California Agricultural Organic Report: 2019–2020." Available at: [https://www.cdffa.ca.gov/is/organicprogram/pdfs/2019\\_2020\\_California\\_Agricultural\\_Organic\\_Report.pdf](https://www.cdffa.ca.gov/is/organicprogram/pdfs/2019_2020_California_Agricultural_Organic_Report.pdf).