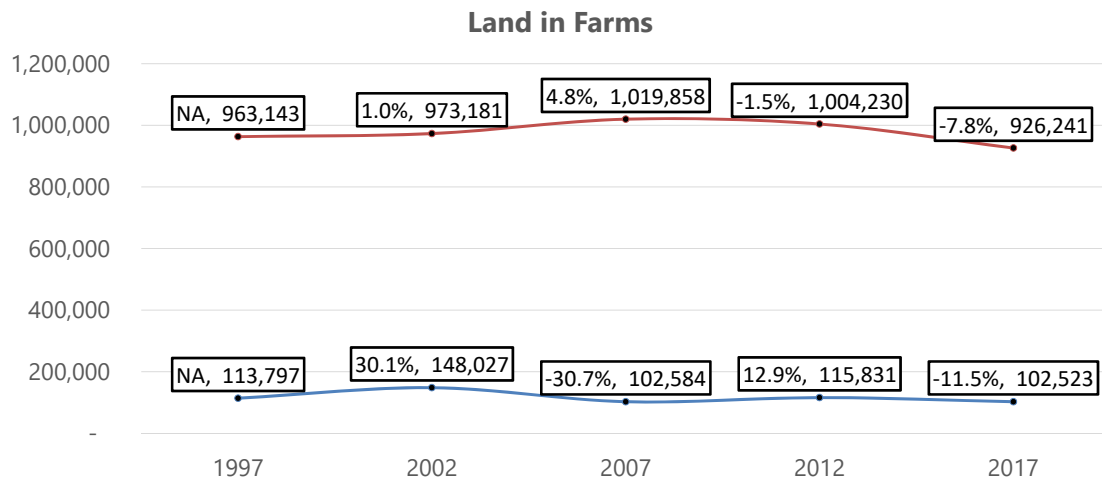


This presentation will take a deep dive into the recently released agricultural statistics from USDA National Agriculture Statistic Service agriculture census performed every five years and released earlier this year. Below this presentation is a County Profile summary for some quick statistics. This presentation will focus on current statistics and look at changes over the past 15-20 years and in some cases changes since 1950.

## Farmland Statistics

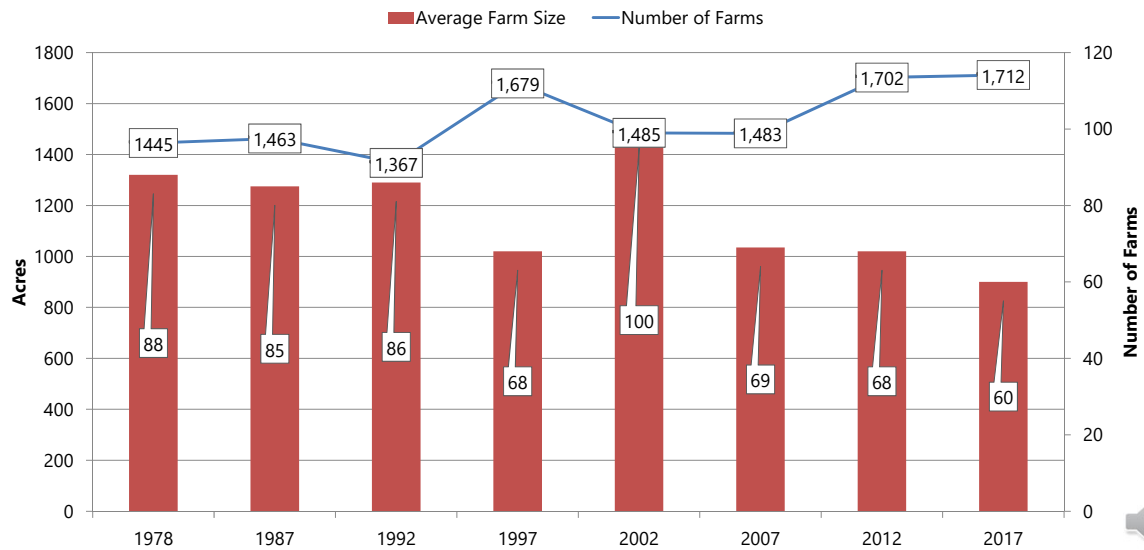


Let's start by looking at the trend in total farmland for Whatcom County (blue line) and all of western Washington (orange line).

The associated boxes for each year represent the percent change from the previous census and the total amount of farmland. This graph allows you to compare the pace of change in farmland values in Whatcom County versus the remainder of Western Washington.

Over the twenty-year period in western Washington total farmland decreased by 3.8% while in Whatcom County over that same period there was a decrease of 9.9%. In other words, nearly three times as much farmland was lost in Whatcom County as compared to western Washington.

## Farmland Statistics

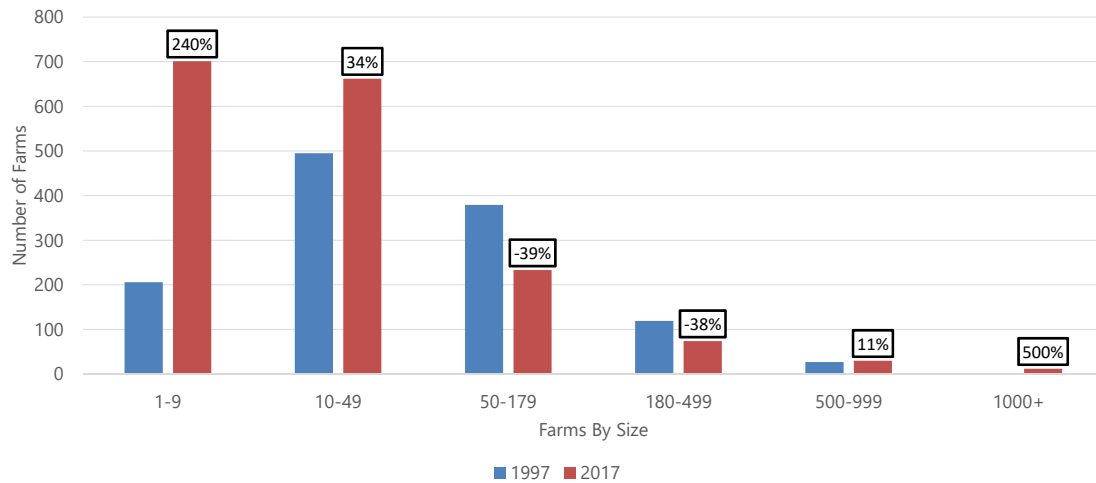


We are looking at the total number of farms (blue line and associated boxes) and average farms size (red columns and associated boxes) between 1978 and 2017.

Couple of things to mention:

- The average farm size has dropped by 28 acres during this time period
- The number of farms has increased from 1,445 to 1,712 or an increase of 18.48%.
- These two values could be related assuming that total farmland remains constant, but as previously stated the County has lost 9.9% of total farmland between 1997 and 2017

## Farmland Statistics



Let's take a closer look at individual farm size. This graph shows the breakdown of farm size in 6 different categories as shown on the x-axis. I've plotted these categories for both 1997 and 2017 to see if there are any differences. The boxes represent the percent change between the two years within each category.

Some notable differences:

There was a 240% increase in the farm category between 1-9 acres

A 34% increase in the farms ranging between 10 and 49 acres

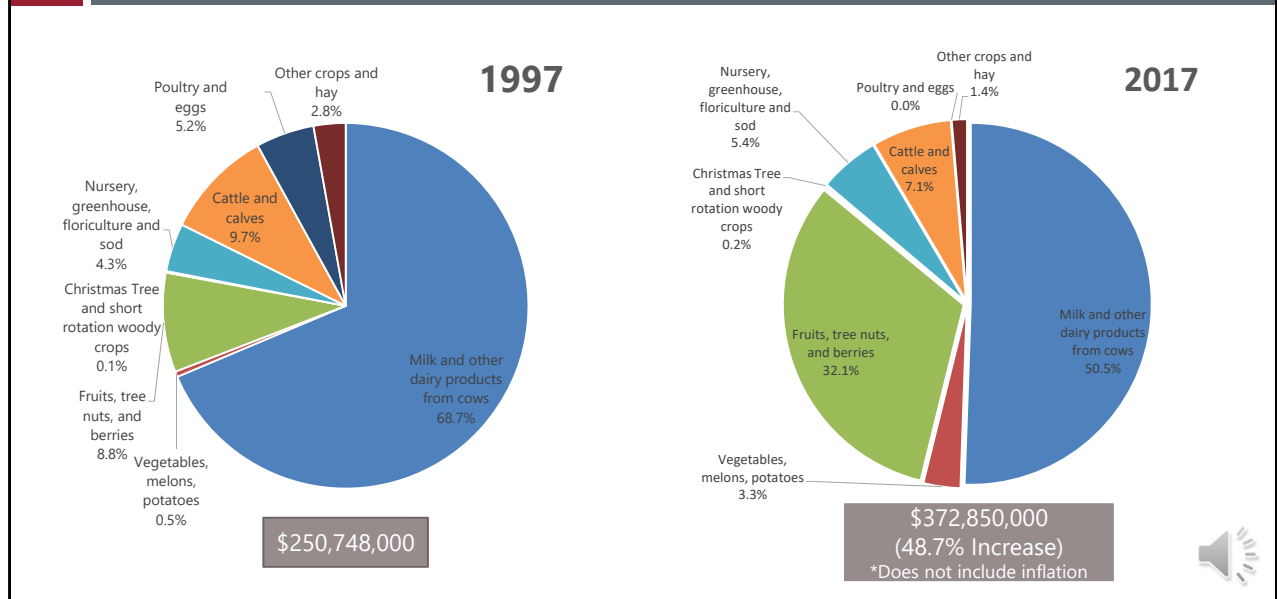
A 39 and 38% decrease for the 50-179 and 180-499 categories, respectively

A 11% increase in the 500-999 a category

A 500% increase in the 1000+ A category

One factor that must be considered when looking at this data is that as previously highlighted total farmland decreased 9.9% during this time period, but the total number of farms increased by 1.9%.

# Whatcom County Agricultural Sales



Now, let's switch gears and talk about agriculture sales.

Total sales were just above \$250 million dollars in 1997 and just over \$372 million dollars in 2017. This is roughly a 48% increase, but does not factor in inflation.

So other notable changes during this time frame:

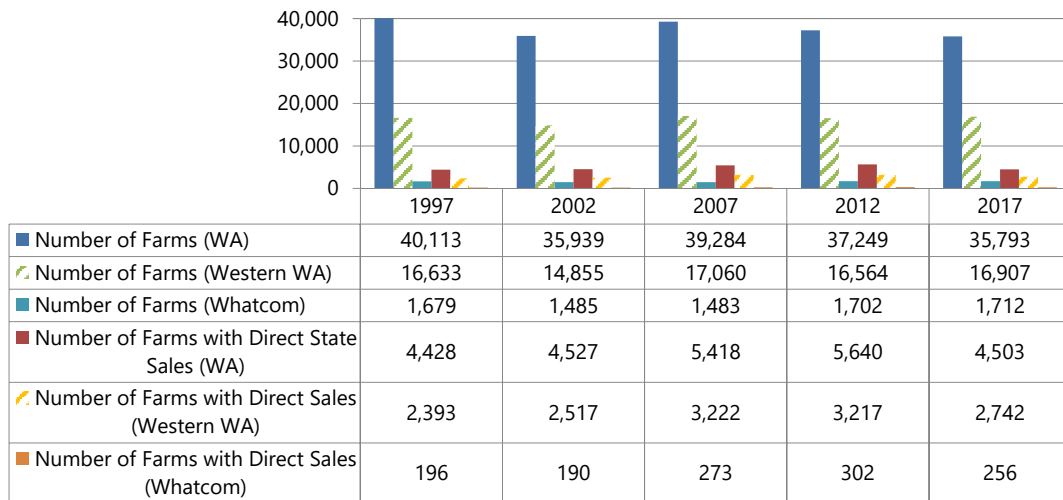
Growth in the Fruits, tree, nuts, and berries category that represented a little more than 8% of the agricultural economy twenty years later represents over 32% or roughly a 1/3 of the economy.

Milk and other products dropped from 68% to a little over 50%

Vegetables, melons, and potatoes jumped from 0.5% to over 3%

Poultry and eggs went from over 5% to below 1%

## Farm Count and Direct Sales



This graph and table shows the total number of farms and the number of direct market farms (those that sell directly to consumers).

I've included Whatcom County, as well as western WA and WA to see how the County compares.

In 1997 farms that directly sell to consumers made up:

WA – 11%

Western WA – 15%

Whatcom County – 11%

In 2017 farms that sell directly to consumers made up:

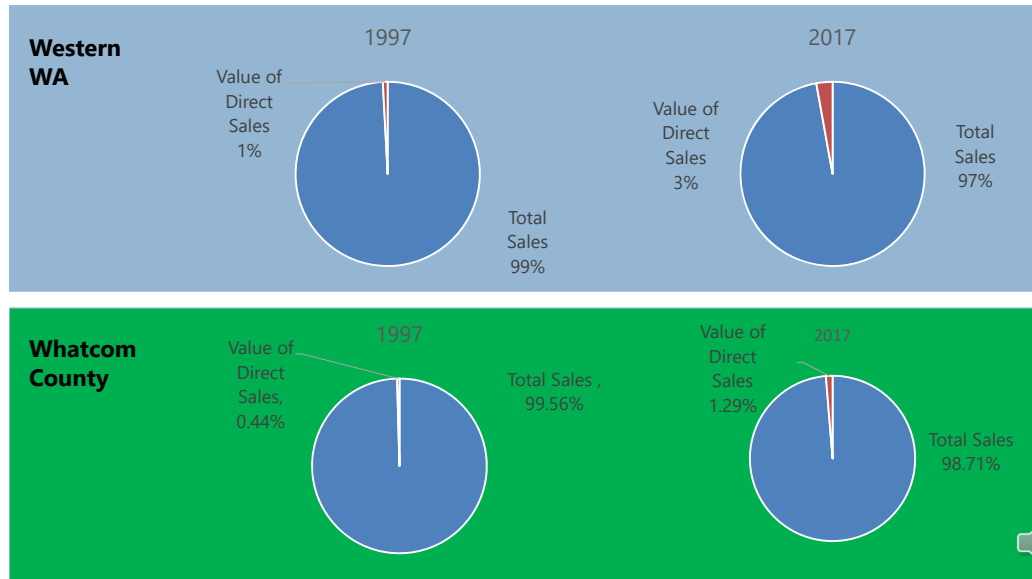
WA – 12%

Western WA – 16%

Whatcom County – 14%

In summary in WA and western WA direct market farm numbers grew 1%, while in Whatcom County that number grew 4%

## Direct Sales Value



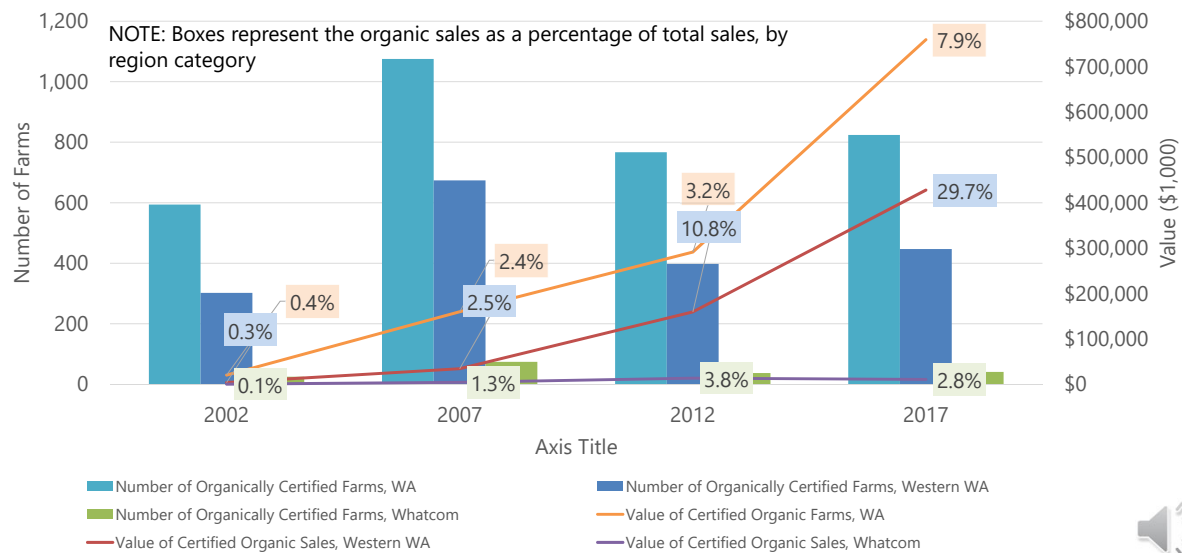
Let's take a close look at direct market sales.

In 1997 the value of direct sales represented 1% of all agricultural sales in Western WA, twenty years later than represents 3%. In real dollar value the growth 4.6 times the 1997 value.

In Whatcom County in 1997 direct market sales represented 0.44% of sales, this number grew to over 1% twenty years later. In real dollar value growth was 4.4 times the 1997 value.

This shows that Whatcom County is largely on par with direct market sales when compared to the rest of western WA.

## Certified Organic Production



Now we are looking specifically at certified organic production and value for WA, western WA, and Whatcom County over a 15-year period. USDA NASS did not include organic on their survey prior to 2002.

For WA, western WA, and Whatcom, the number of certified organic farms peaked in 2007, but some growth did occur between 2012 and 2017.

Organic sales grew from representing just 0.4% of total sales in 2002 to almost 8% by 2017. That value grew 37 times between 2002 and 2017.

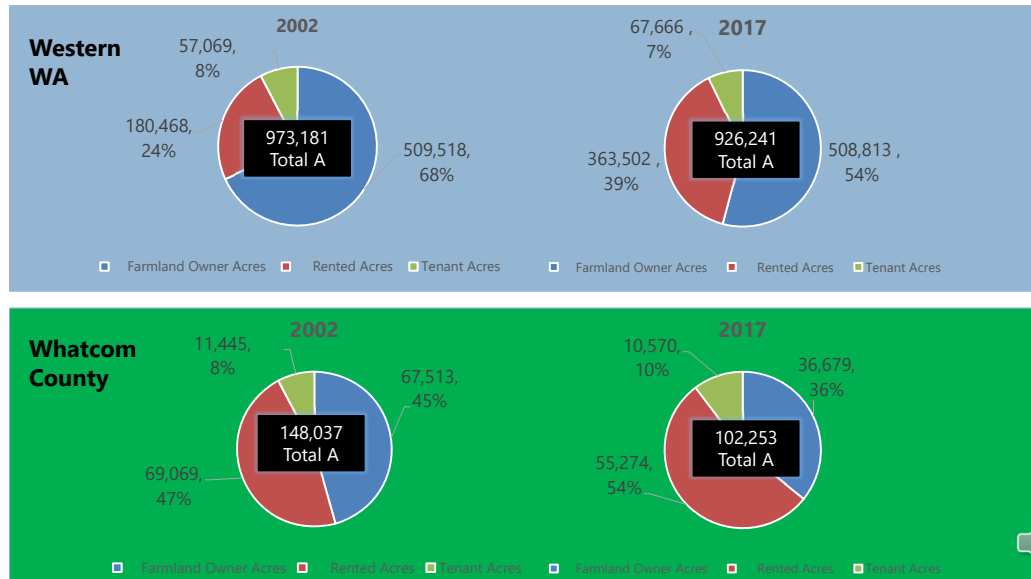
In western WA, sales represented 0.3% of total sales in 2002 and this number grew to over 29.7% in 2017. That value grew 114 times between 2002 and 2017.

While in Whatcom County, organic sales represented a larger portion of total sales in 2012 then dropped 5 years later. The actual value grew 34 times in this 15-year period.

In summary it doesn't appear Whatcom County is keeping up with the rapid growth of organic sales when compared to the rest of western WA, but the total growth of sales is more on par with that of WA state.



# Farmland Ownership



Let's now take a look at farmland ownership.

USDA NASS breaks down farmland ownership/use into three major categories: Owned, Rental, and Tenant.

Full owners operated only land they **owned**.

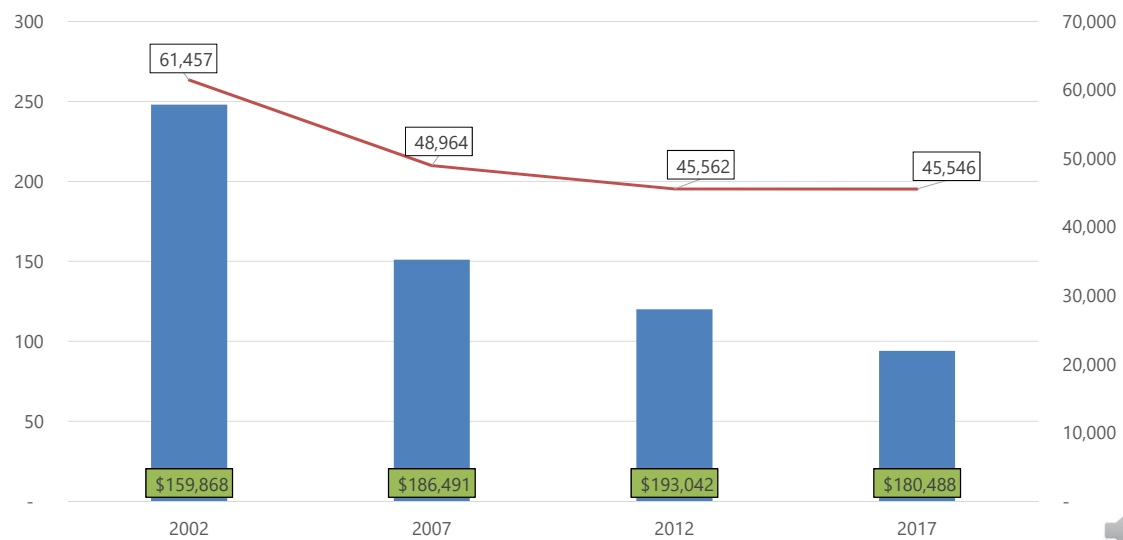
Part owners operated land they owned **and** also land they rented from others.

Tenants operated **only** land they rented from others or worked on shares for others.

In 2002 in western WA 68% of farmers owned all of the land they used. This dropped to 54% in 2017. The Rented category grew from 24-39% in that time period, while the tenant category dropped 1%. Keep in mind that over 46,000A of ag land were lost during that period. But it appears in Western WA that there is less total land and less farmers owning all of the land they operate.

In Whatcom County in 2002, 45% of used land was fully owned and 47% a mixture of owned and rented. By 2017 54% of farmers now rented and owned the land they used. To reiterate, Whatcom County lost 45,774 A (almost equal to all of the land in Western WA) of land and the majority of the County's farmland is now combined rented/owned.

## Whatcom County Dairy, 2002 - 2017



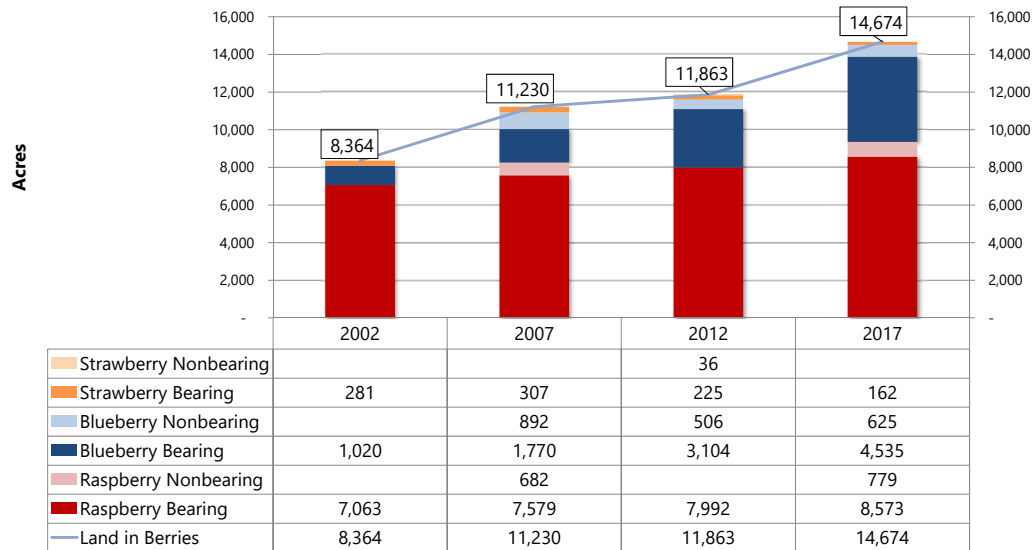
We are looking at the number of dairy (columns with values on left side of graph), number of cows (line with values), and overall value of dairy products sold (values in green boxes) between 2002 and 2017.

Since 2002 both the number of dairy farms and the number of dairy cows in Whatcom County have declined. Though in the past five years the number of cows has steadied.

Between 2002 and 2017 the number of dairy farms decreased by 62.1%, the number of cows increased by 21.8%, the value of dairy products sold increased by 12.9%, and the value per cow increased by 52.3%.

For reference comparing 1950 values to 2017 values: the number of dairy farms decreased by 97.5%, number of cows increased by 21.8%, the value of dairy products sold increased by 2404.7% and the value per cow increased by 1956.9%. This doesn't account for inflation.

## Whatcom County Berries, 2002-2017



Let's now look at the berry industry.

Between 2002 and 2017, total berry acreage went from 8,364 to 14,674. This is an increase of roughly 43%.

This has largely been due to growth of blueberry acreage from 1020 to 5,160 total acreage. This is a growth of 80% in a fifteen-year period. Whatcom County represents 40% of the state's acreage and has the most amount of acres of all counties.

Raspberry plantings also grew. Because of the life cycle of a raspberry planting I will be using the bearing acreage and not including the nonbearing acreage. Growth went from 7,063 A to over 8,500 for a growth of over 17%. This is 87% of the state's red raspberry acreage.

## Whatcom County Producers, Principal Farm Operator

	2002	2017
Female	146 (10%)	847 (37%)
Male	1,313 (90%)	1,459 (63%)

Age Group	2002	2017
<25 yrs. old	11 (<1%)	35 (1%)
25-34 yrs. old	45 (3%)	204 (7%)
35-44 yrs. old	298 (20%)	394 (13%)
45-54 yrs. old	496 (33%)	625 (21%)
55-64 yrs. old	361 (24%)	774 (26%)
65+ yrs. old	274 (19%)	950 (32%)



Let's switch gears and look closely at the farmers themselves.

In 2002 females represented 10% of Whatcom County farms, this has changed to 37% in 2017.

There were some pretty big shifts in age classes between 2002 and 2017

There were considerable growth in the 25-34 age group going from 3-7%

There was a decline in the 35-44 and 45-54 to 13% and 21%, respectively

Minor change in the 55-64

But a big jump in the 65+ category to now representing close to a third of all Whatcom County Farmers

While naturally farmers aged during this time period but the total number of farmers jumped to 2,982 from 1,485 or an increase of 100.8%.

## Whatcom County Producers, Principal Farm Operator

Primary Occupation	2002	2017
Farming	805 (54%)	1066 (36%)
Other	680 (46%)	1916 (64%)

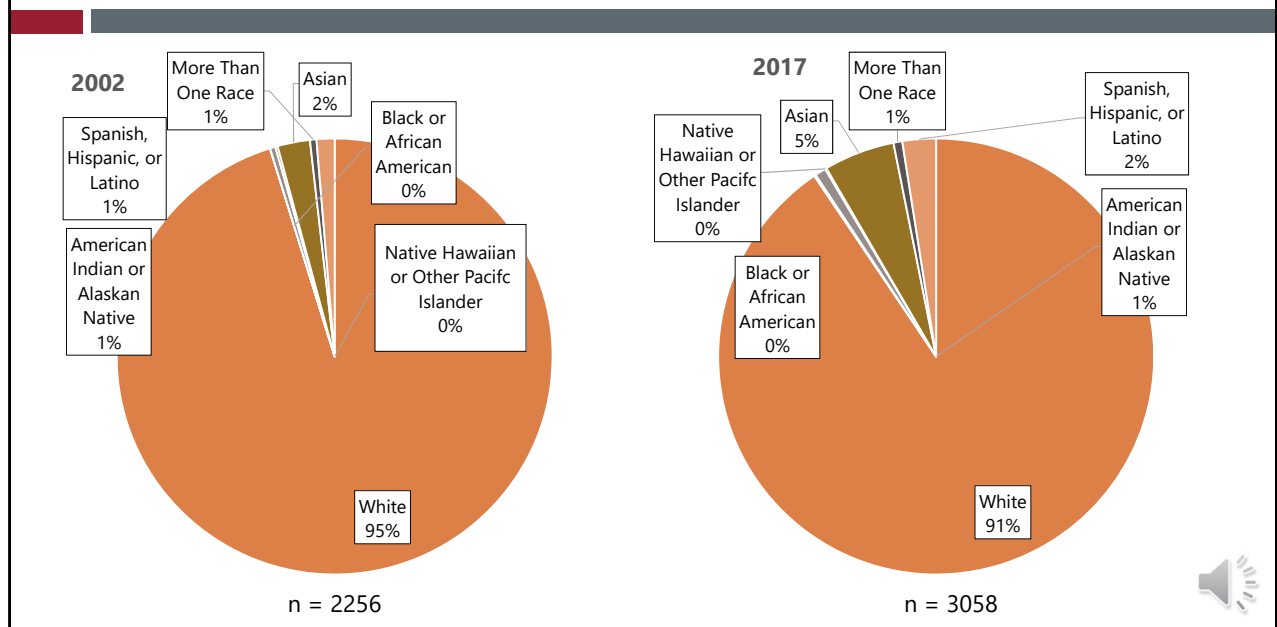
Years on Present Farm	2002	2017
2 years or less	54 (3.6%)	158 (5.3%)
3-4 years	84 (5.7%)	191 (6.4%)
5-9 years	280 (18.9%)	538 (17.9%)
10+ years	1,067 (71.9%)	2,120 (70.5%)



The majority of farmers also reported that their primary occupation is not farming in 2017 a change from 2002 when it was reported as their primary occupation.

Interesting over the 15 years between 2002 and 2017 there were many changes in the reported time present on current farm; the categories pretty much stayed the same.

## Whatcom County Producers by Race



Lastly, let's look at the reported race of farmers.

The vast majority of farmers in Whatcom County reported by White (95% in 2002 and 91% in 2017)

But the race category with the biggest change was Asian jumping from 2% to 5%.



I hope you enjoyed this presentation and if you are interested in more information look at the links to the Census data below.