

## Status of Organic Fruit Industry in the USA

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### Abstract

Organic fruit production and sales have grown tremendously in recent years in the USA, with the category of organic fruit and vegetables consistently making up a large plurality of total organic food sales. A status update is provided on organic fruit production and related considerations in the USA. Attention is paid to a broad diversity of fruit crops including citrus, grapes, berries, temperate and subtropical. Data is presented on the current situation relative to historical trends regarding land use, production, other economic factors, and also market considerations. Specific focus is given to the states California and Washington, which have historically held a great majority of organic fruit production area in the USA. Finally, current and future challenges to organic fruit industry, as well as favorable trends and factors are explored, including policy and regulatory matters.

**Keywords:** organic production, organic economics, organic area, organic trends

### Summary Report

Consistent with patterns across the globe and around the world, organic production systems are trending upwards in the USA, and this is certainly true for the fruit sector. From 2018 to 2019 (the most recent year where full data is reported), total organic food sales increased 5% to \$55.1B USD (€49.2B Euro). Likewise, organic fruit and vegetable sales also increased 5% during this time-period to a total of \$18B USD (€16.1B Euro). This increase compares favorably to total food sales, year-over-year, which increased by only 2%. Notably, the fruit and vegetable category consistently retains a plurality for largest share of organic sales, coming in at 35.9% in 2019 while capturing 15% of the total fruit and vegetable market share (Haumann, 2021).

In terms of total organic production land area, the USA continues to rank highly among individual nations in the fruit categories of citrus, grapes, and temperate fruit, through 2019. For citrus, USA ranked 5<sup>th</sup> with 5,403 hectares (ha) in organic production, (Schlatter et al., 2021); organic citrus production is largely driven by orange (2,400 ha) and lemon (1,672 ha) cultivation; (NASS, 2020). For grapes, USA ranked 4<sup>th</sup>, with 27,444 ha in organic production. For temperate fruit, USA ranked 5<sup>th</sup>, with 18,130 ha under organic management, with apples representing the predominant crop under organic cultivation, with 14,628 ha recorded in 2019.

To a great degree, organic fruit production in USA is led by production in two western states, California and Washington. This has been attributed to the drier, semi-arid climates in the western USA, which are associated with fewer insect pest and disease problems (Granatstein & Kirby, 2016). In consideration of citrus fruit, apples, grapes, berries and all other fruits (other temperate, subtropical/tropical and olives), California leads the way, with an estimated 55.9% of the total organic fruit cultivation land area. This includes all recorded organic land area for olives, greater than 90% for all citrus fruits, avocados, figs, and plums/prunes, and 74% to 89% for apricots, strawberries, nectarines, raspberries, and grapes (NASS, 2020). Washington on the other hand, provides 90% of all organic land area within the USA for apples, 78% for pears and 75% for sweet cherries (Granatstein & Kirby, 2020).

In the short-term, the outlook for organic fruit production is positive. In a recent survey of all certified organic farms on their five-year production plans, 73% planned to either increase (29%) or maintain (44%) current levels of organic production. Conversely, only 4%

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of farms planned to decrease organic production, 2% discontinue organic production or 2% discontinue all production; 20% responded “do not know”. More reflective of organic fruit production, similar response percentages were observed in California and Washington (NASS, 2020). Congruently, recent trends show substantial increases, for example, in organic temperate tree fruit cultivation area in the USA. From 2016 to 2019, organic apple area increased by 73%, pear by 81%, cherry by 34%, nectarine by 6%, peach by 9% and apricot by 36% (Granatstein & Kirby, 2020).

More long-term, organic fruit production stands to benefit from societal forces that are being aimed at supporting organic systems in general. The National Organic Program proposed revision of the USDA Organic Regulation in late 2020, and this program was underway through 2021 (Kirchner et al., 2021). Proposed changes aim to increase transparency and traceability of organic certification throughout the supply chain, mandate use of electronic import certificates, and increase unannounced inspections and inspector qualifications. The net effect of these regulations is expected to increase protection of organic integrity and build consistent certification practices to prevent fraud and increase confidence in organic products.

Despite positive trends for organic fruit production in recent decades, many challenges persist. Invasive insect pests that attack fruit have emerged in the USA with outbreaks over a decade ago, spotted-wing drosophila (*Drosophila suzukii*) in 2008 and the brown marmorated stinkbug (*Halyomorpha halys*) in 2010 (Granatstein et al., 2013). More recently, the spotted lanternfly (*Lycorma delicatula*) was first identified in the USA in 2014, and is currently spreading across the country. Organic fruit production generally has higher costs than conventional production systems due to fertilizer inputs as well as pest/disease management (Granatstein & Kirby, 2016). The organic fruit production sector will undoubtedly benefit from more dedicated and focused research aimed at improving organic productions systems generally.

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