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Organic Specialty Crops at Washington Farmers Markets: 2018-2021

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CONTEXT

To establish baseline data and to document annual trends, the Washington State Farmers Market Association (WSFMA) has compiled data from its member farmers markets about the number of organic specialty crop farmers who sold at their markets in the prior year.

METHODOLOGY

There are over 115 Washington Farmers Markets that are members of the WSFMA. WSFMA member farmers markets represent approximately 72% of all Washington farmers markets and generated nearly \$59.5 million in direct sales in 2021. Like other sectors of the economy, farmers markets are still responding to and recovering from the COVID-19 pandemic. WSFMA member farmers markets abide by the “Roots Guidelines” and complete an annual membership application. The membership application serves as the primary data collection tool. Data is then cleaned, verified, and summarized.

Raw farmers market data is generally collected by the farmers market staff or volunteers. Data is considered both reliable and valid for an individual farmers market. However, data between farmer markets and from year to year can be far less reliable given the range of methodologies, training available, and time needed to collect, clean and report data. It is a challenge for farmers market data achieve and maintain precision, especially with regards to reported sales and shopper counts.

Each vendor counted and reported here represents a direct sales opportunity at a farmers market. It does not represent unique farm or other vendor businesses.

Data on the WIC and Senior Farmers Market Nutrition Program is provided by the Washington State Department of Health.

KEY FINDINGS

- The geographic distribution of certified organic specialty crop vendors throughout Washington is concentrated in Western Washington. As expected, the greatest portion (38%) in 2021 is in Seattle and King County; however, this is down from 52% in 2020.
- A high percentage of farm vendors selling at farmers markets are specialty crop vendors; and this percentage has grown from 77% in 2018 to 88% in 2021.
- Between 2018 and 2020, the percentage of specialty crop farm vendors that are certified organic was stable at 19%; however, in 2021 it dropped to 14%.
- The total number of organic specialty crop vendors at farmers markets declined from 314 in 2018 to 236 in 2020.
- Likewise, the average number of organic specialty crop vendors at all farmers markets also declined from 3.6 in 2018 to 2.6 in 2021.
- The number of farmers markets that reported 5 or more organic specialty crop vendors declined from 22 in 2018 to 15 in 2021.
- Following this trend, the number of farmers markets that reported at least one organic specialty crop vendors declined from 87 in 2018 to 69 in 2021 (up from 68 in 2020).
- While the sales of organic specialty crops at farmers markets are not tracked at the state level, overall farm sales were highest in 2019 at just under \$32 million. The COVID-19 pandemic impacted all aspects of farmers markets business in 2020, including overall sales. Farmers markets are still recovering and rebuilding.
- A reasonable proxy for specialty crop sales at farmers markets is the WIC and Senior Farmers Market Nutrition Program which may be used to purchase unprocessed fruits, vegetables, cut herbs, and/or, for seniors only, raw honey. FMNP sales at Washington farmers markets have declined 40% from 2019 to 2021 to just under \$820,000.

ORGANIC SPECIALTY CROP FARMERS AT FARMERS MARKETS: 2018-2021

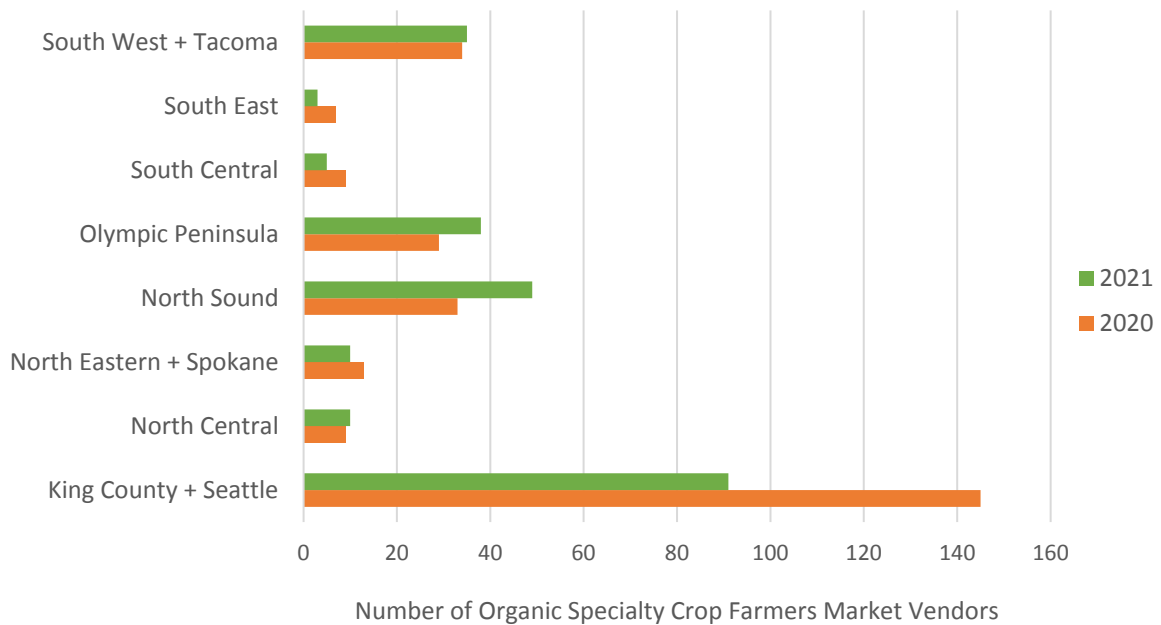
WSFMA Farmers Markets: Metrics	2018	2019	2020	2021
Number of Farmers Markets Reporting	110	111	117	115
Number of WA Cities	85	85	95	93
Number of WA Counties	30	30	31	29
% of FM classed as "Small or Very Small"	53%	50%	65%	62%
% of FM classed as "Medium, Large or Very Large"	47%	50%	35%	38%
% of FMs that are part of Single Market Organizations	75%	76%	79%	78%

Number of Organic Specialty Crop Farmers Market Vendors* by Region of Washington

Region	2020		2021	
	Count	Percent	Count	Percent
King County + Seattle	145	52%	91	38%
North Central	9	3%	10	4%
North Eastern + Spokane	13	5%	10	4%
North Sound	33	12%	49	20%
Olympic Peninsula	29	10%	38	16%
South Central	9	3%	5	2%
South East	7	3%	3	1%
South West + Tacoma	34	12%	35	15%
	279	100%	241	100%

* Not unique

Number* of Organic Specialty Crop Farmers Market Vendors by Region of Washington State, 2020 and 2021



* Non-unique

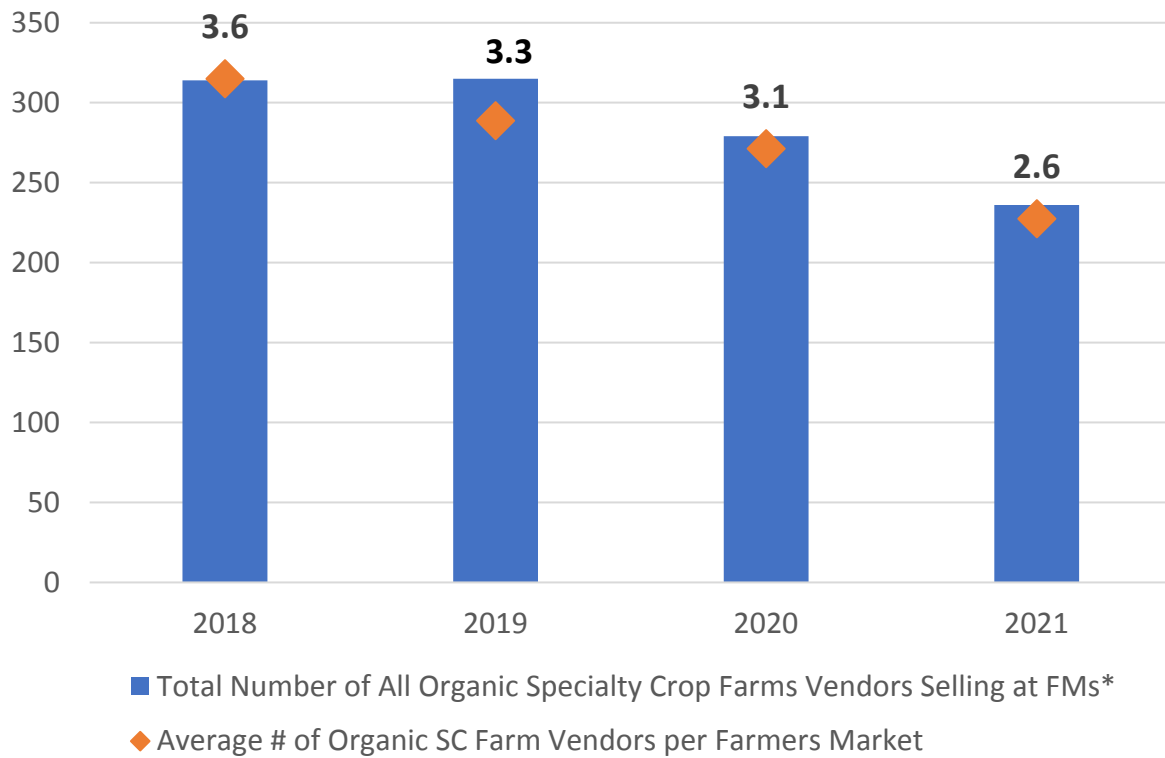
WSFMA Farmers Markets: Market Days	2018	2019	2020	2021
Aggregated Number of Market Days	2,673	2,651	2,382	2,732
Average Number of Market Days per Farmers Market	24.9	24.8	24	25

WSFMA Farmers Markets: Farm Vendors	2018	2019	2020	2021
Total Number of All Farm Vendors Selling at Farmers Markets*	2,158	2,114	1,738	1,890
Average Number of Farm Vendors per Farmers Market	20.3	19.7	17.9	17.3

* Not unique

WSFMA Farmers Markets: Specialty Crop Vendors	2018	2019	2020	2021
Total Number of All Specialty Crop Farms Vendors Selling at Farmers Markets*	1,661	1,698	1,499	1,656
Average Number of Specialty Crop Farm Vendors per Farmers Market	16.8	16.6	16.1	15.7
Percentage of Farm Vendors that are Specialty Crop Farms	77%	80%	86%	88%

Total Number of Organic Specialty Crop Vendors and Average per Farmers Markets, 2018-2021



WSFMA Farmers Markets: Organic Specialty Crop Vendors	2018	2019	2020	2021
Total Number of All Organic Specialty Crop Farms Vendors Selling at Farmers Markets*	314	315	279	236
Average Number of Organic Specialty Crop Farm Vendors per Farmers Market	3.6	3.3	3.1	2.6
Number of Farmers Markets with 5 or more Organic Specialty Crop Vendors	22	19	19	15
Number of Farmers Markets with at least one Organic Specialty Crop Farm	87	74	68	69
Percentage of Specialty Crop Farms that are Certified Organic	19%	19%	19%	14%

* Not unique

WSFMA Farmers Markets: Farm Vendor Sales	2018	2019	2020	2021
Total Sales for All Farm Vendors	\$ 30,465,272	\$ 31,815,456	\$ 22,567,323	\$30,770,367
Average All Farm Vendor Sales per Farmers Market	\$ 290,145	\$ 294,588	\$ 240,078	\$284,911

WSFMA Farmers Markets: Food Access	2018	2019	2020	2021
Farmers Market Nutrition Program: Washington Specialty Crop Growers Sales at Washington Farmers Markets* <i>Source: WS Dept of Health, Grower Redemption Report by County</i>	unavailable	\$ 1,368,412	\$ 970,264	\$ 816,684

* Farm stand and non-WA sales subtracted from total.