



**1** Greenhouse & nursery products  
\$1,039,180,000



**2** Grass seed  
\$507,732,000



**3** Cattle and calves  
\$465,249,000



**4** Hay  
\$459,840,000

OREGON'S  
**TOP 8**  
Agricultural  
Commodities\*



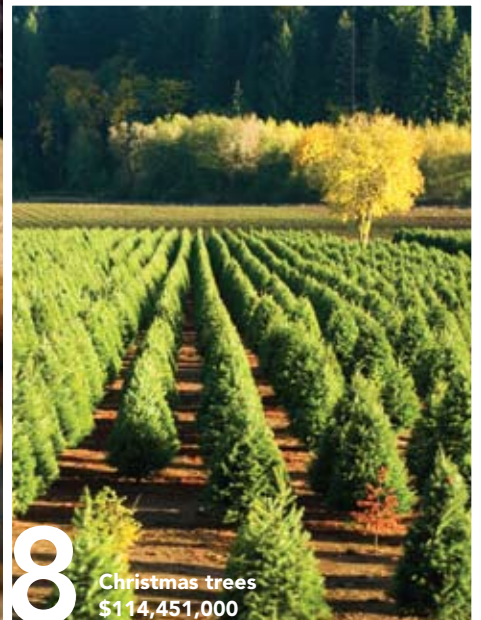
**5** Milk  
\$408,639,000



**6** Wheat  
\$360,245,000



**7** Potatoes  
\$146,726,000



**8** Christmas trees  
\$114,451,000

\* Oregon's top agricultural commodities in 2007. Published by the Oregon Department of Agriculture, May 2008.

# OREGON AGRICULTURE BY THE NUMBERS BY HOWARD SILVERMAN

JUDGING BY THE GARDENS, MENUS, AND MARKETS AROUND TOWN, FOOD LITERACY IN PORTLAND MUST BE AMONG THE HIGHEST OF ANY CITY IN THE NATION. SMALL URBAN PLOTS FLOURISH. LOCALITY AND SEASONALITY ARE HALLMARKS OF THE REGION'S CUISINE. AND SOME GROWERS EVEN ENJOY BRAND-NAME RECOGNITION. AMIDST THESE BOUNTIES, IT WOULD BE EASY TO ASSUME THAT A SIZEABLE SHARE OF OREGON'S HARVEST GOES TO FEED OREGON'S EATERS. BUT A CLOSER LOOK REVEALS OTHERWISE.

To gather a picture of the whole of the state's agriculture, I dug into the Oregon Department of Agriculture (ODA) website and spent some time in conversation with its staff. Here then is a quick sketch, an effort at discovery.

### LAY OF THE LAND

First, the scope of agricultural activities, as defined by ODA, is greater than one might realize. Ranching is included, of course, but so are seafood and farmland timber harvests. There are also about 60 non-edibles among the state's 225 products, including three of the top five money makers: greenhouse and nursery products, grass seed, and hay. Some of the state's signature products appear further down the earnings list: Christmas trees (8), grapes (10), hazelnuts (11), and strawberries (30).

All told, 39,300 farms cover more than 17 million acres, figures that declined by 1.6 percent and 3.1 percent, respectively, between 1997 and 2005. Agricultural lands account for roughly 28 percent of the state's total private lands; more than half of this land is used for livestock and less than a quarter is cultivated. The rest is devoted to woodlands, houses farm buildings, lies fallow, or is enrolled in a conservation program such as the federally funded Conservation Reserve and Conservation Reserve Enhancement Programs.

Needless to say, the bastion of Oregon's fertility is the Willamette Valley, home to 70 percent of the state's highest quality soils. This natural advantage pays off, with Marion and Clackamas Counties topping the state's sales figures. But fertility and sales need not always correlate. A high-value product like wine grapes, for example, is grown on less productive hillside soils.

### MARKET REACH

One surprise in Oregon agriculture may be that 80 percent of the state's production is exported—with nearly half this amount sold outside the country. Blueberries, Dungeness crab, and hazelnuts, for example, are harvested at 7, 10, and 300 times the level of the state's estimated consumption, respectively. For these products, export markets are a natural. Oregon's primary international markets include Japan, Canada, and South Korea. The 20 percent of production consumed in state reaches eaters through processors like NorPac, grocery retailers, food co-ops, institutional buyers like hospitals and restaurants, and direct markets. Although farmers' markets are growing quickly, they account for just 1.25 percent of sales statewide.

A vast majority—98 percent—of the farms are operated by families, and more than a thousand are registered as Century Farms and Ranches, with more than a hundred years on the Oregon landscape. Yet for many growers, farm work accounts for only a portion of their income. Among mid-size operations—those with annual sales between \$10,000 and \$250,000—only 37 percent are able to earn at least half their income from farming. This figure rises to about 70 percent among larger growers. Off-farm activities provide growers with a significant portion of their living expenses and, for some, health care benefits as well.

Oregon growers of potatoes, onions, pears, wheat, and grass seed are identified by ODA as vulnerable to the challenges of the low-cost, high-volume global commodity system. "They buy at retail prices, sell at wholesale prices, pay freight both ways, and have no control either way," laments ODA economist Brent



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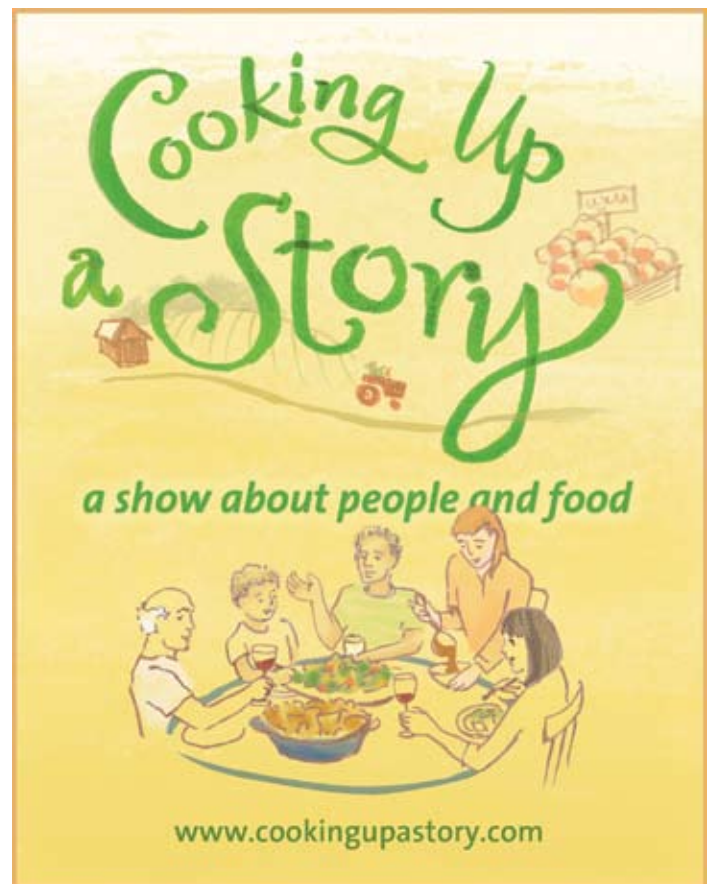
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Searle. Still, the value of the state's agriculture has increased nearly every year for the last 20 years. In fact, 2007 profits were up by 50 percent, and recent roller-coaster prices for commodity products like wheat could contribute to another increase in 2008.

Some Oregon growers remain competitive by adopting advanced technologies, like GPS systems and satellite mapping, which help to reduce energy and labor costs. Some seek to supplement their farm work with income from renewable energy, like wind turbines, or from tourism opportunities, as wine growers have successfully done. Some add value to their products through food processing, and some add value through third-party certification. A total of 2.6 million Oregon acres are enrolled in one of five certification programs.

Two measures point to agriculture's roughly 7 percent direct contribution to the state's economy. Farm sales stand at \$5 billion, and after adding purchases of inputs, processing, warehousing, transport, and retail sales, the figure grows to \$18 billion. Similarly, work on the farm accounts for only a portion of the nearly 150,000 jobs supported across the industry. When indirect and household expenditures are included in these measures, agriculture's economic contribution rises to 10 percent.

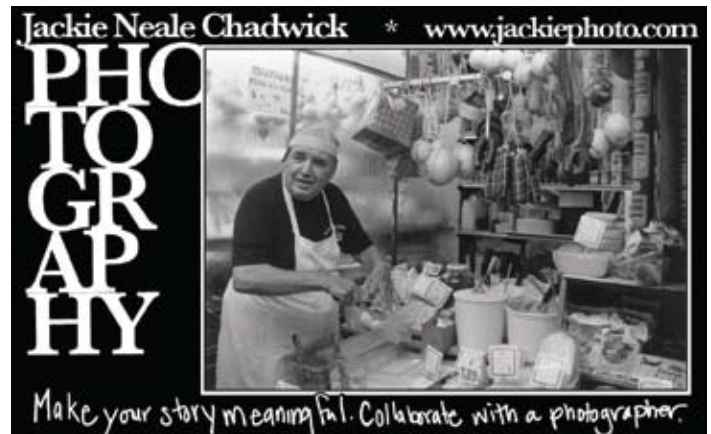
#### ODA'S ROLE

With a staff of 372 and a 2007-2009 budget of \$81 million—nearly 60 percent of which is derived from license and user fees—ODA undertakes a three-fold mission: to ensure food safety, protect agricultural natural resources, and foster

economic development. Examples of ODA efforts to promote Oregon agriculture range from overseeing price negotiations between grass seed growers and their buyers to urging local processors of Oregon strawberries to add a statement of origin on their packaging.

These days, expressions of support for Oregon agriculture are all around. What better time then, for a fresh look at farming, fishing, and ranching country—and the important contributions of the people who live and work there. *ep*

**Howard Silverman** is senior writer and analyst for Ecotrust. He thanks ODA's Gary Roth, Brent Searle, Laura Barton and Bruce Pokarney for the conversations that informed this article.



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