

Oregon Agriculture Site and Situation

*Oregon Land Conservation and
Development Commission*

December 18, 2023



**OREGON
DEPARTMENT OF
AGRICULTURE**

Key Points

- Oregon agriculture is very important to Oregon's economy
- Oregon agriculture is incredibly diverse
- Diversity in crops, production systems, farm sizes, and markets keeps the industry resilient
- Oregon is a leader in protecting agricultural land



**OREGON
DEPARTMENT OF
AGRICULTURE**

Diversity of Production

- Over 225 commodities produced in Oregon
- Helps create greater stability throughout the industry over time.
- Most of Oregon's ag products are not federal commodity crops.
- Varied size of farms and methods of production.



OREGON
DEPARTMENT OF
AGRICULTURE

Oregon Top Crops

Greenhouse & nursery	\$1,321,200,000
Cattle & calves	\$676,227,000
Grass seed (+2)	\$639,178,000
Hay (-1)	\$578,702,000
Milk (-1)	\$550,620,000
Wheat	\$276,325,000
Grapes for wine (-1)	\$271,000,000
Industrial hemp *	\$247,767,000
Potatoes (-2)	\$237,046,000
Blueberries (+1)	\$171,667,000

Based on 2021 data and crop estimates

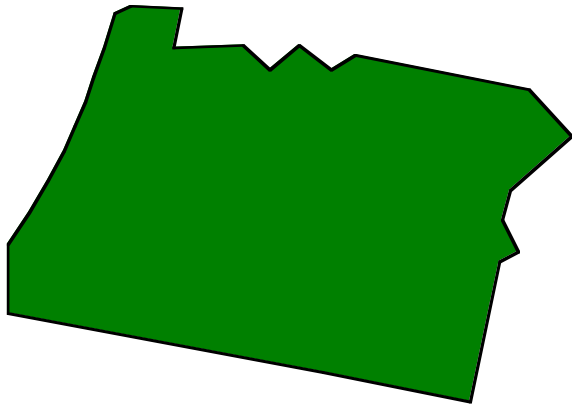


Oregon's Top 10 Agricultural Producing Counties 2017

• Marion	\$701,580,000
• Morrow	\$596,487,000
• Umatilla	\$374,650,000
• Clackamas	\$373,397,000
• Malheur	\$343,514,000
• Yamhill	\$301,932,000
• Linn	\$292,044,000
• Washington	\$290,402,000
• Klamath	\$192,598,000
• Lane	\$162,792,000



OREGON
DEPARTMENT OF
AGRICULTURE



Oregon Leads the Nation in the Production of:

- Hazelnuts
- Christmas Trees
- Dungeness Crab
- Sugar beets for seed
- Red clover seed
- Crimson clover
- White clover seed
- Potted Florist Azaleas
- Carrot Seed
- Parsley Seed
- Grass seed, all
- Orchard grass seed
- Ryegrass seed
- Fescue seed
- Blackberries, all
- Logan berries
- Raspberries, black
- Boysen & Youngberries
- Rhubarb



**OREGON
DEPARTMENT OF
AGRICULTURE**

Oregon Ag's ECONOMIC footprint

- **\$33.3 billion economic footprint**
- **\$31.1 billion in sales of goods and services**
- **15.4% of Oregon's economy**
- **20.3% of jobs or 1 in every 5 jobs**
- **Farm gate value over \$5 billion**



Agricultural exports

- 75-80% of production leaves the state
- 35-40% of production leaves the country
- Largest export sector in terms of volume
- Second largest export sector in terms of value
- 19% of total state exports
- 60% of the Port of Portland's total tonnage of exports



= Traded Sector

Oregon Agricultural Land Base Land in Farms

- 17 million acres in FARM USE
- 15.5 million acres are ZONED as agricultural land
- 13.1 million acres receive special farm value assessment as EFU land.

Total land area of Oregon = 63.018 million acres

Oregon Agricultural Land Base

Land in Farms

- 37,616 total farms
- 67% are 49 acres or less in size
- These farms account for 2.2% of the area of land in farms and 9% of the production value
- 72% of the area of land in farms involves farms that generate \$100,000 or more

Total land area of Oregon = 63.018 million acres

Soils

- Over 4.6 million acres of high-value farmland soils; 40% in the Willamette Valley.
- About 3.4 million acres of those HVF soils are located outside UGBs and zoned for agriculture.
- About 1.2 million acres of prime farmland; 78% in the Willamette Valley, nearly 20% in Metro counties.



OREGON
DEPARTMENT OF
AGRICULTURE

Irrigated Agricultural Lands

- More than 1.6 million acres of irrigated land in Oregon
- Irrigation enables more diversity of crops that can be grown.
- 43% of all Oregon farms do some irrigation.
- Irrigated farms produced 73% of the total value of Oregon's harvested crops.

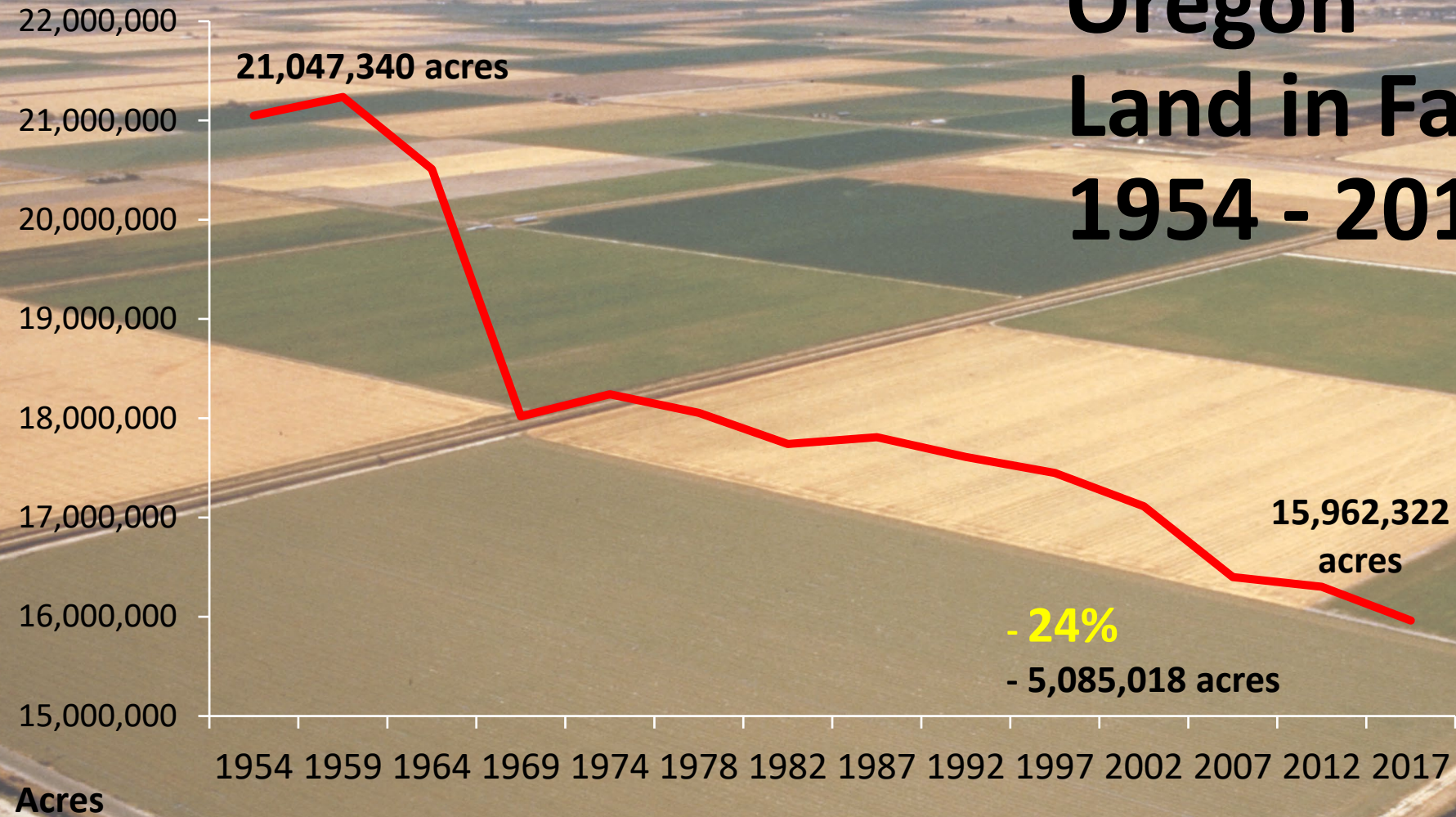


Source: Census of Agriculture, Farm and Ranch and Irrigation Survey



OREGON
DEPARTMENT OF
AGRICULTURE

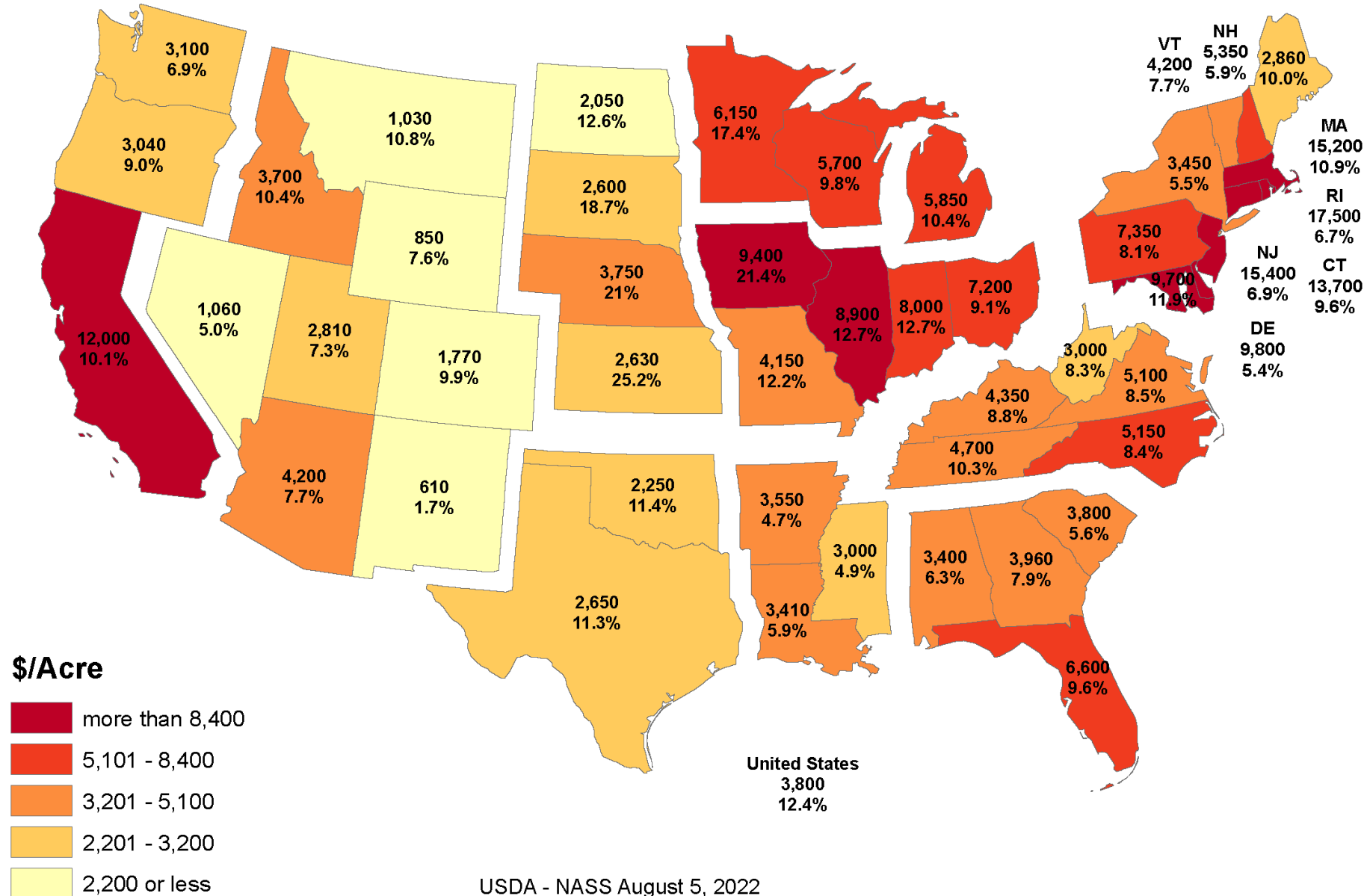
Oregon Land in Farms 1954 - 2017



Source: U.S. Census of Agriculture, Oregon

2022 Farm Real Estate Value by State

Dollars per Acre and Percent Change from 2021

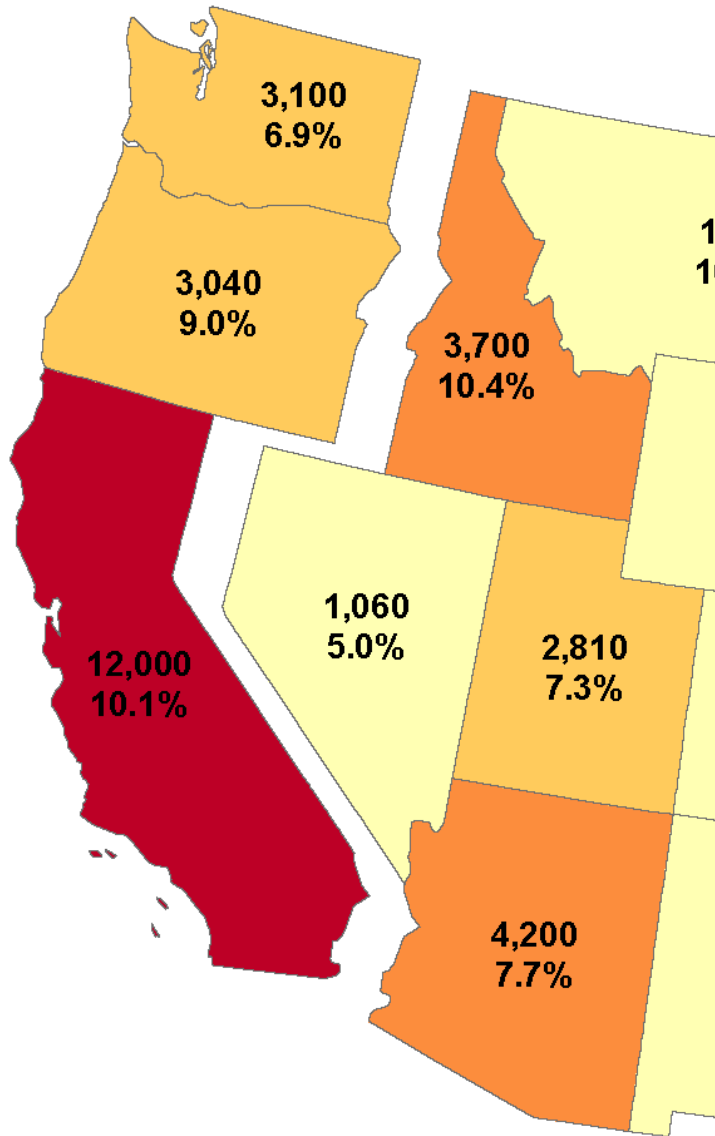


USDA - NASS August 5, 2022



**OREGON
DEPARTMENT OF
AGRICULTURE**

Land Values



- Oregon ag land values continue to increase.
- Oregon's average value per acre is less than almost any other state with growth pressures, primarily due to LESS speculative land value associated with potential for development.
- Increasingly, there are speculative land value concerns related to development of nonfarm land uses and potential UGB expansion.



Issues and Trends



**OREGON
DEPARTMENT OF
AGRICULTURE**

Impacts of Development on Agriculture

- **Conversion, land and water**
 - Quality of land
 - Critical mass
- **Ability to conduct farm/ranch operations**
- **Footprint and shadow**
- **Cumulative impacts**



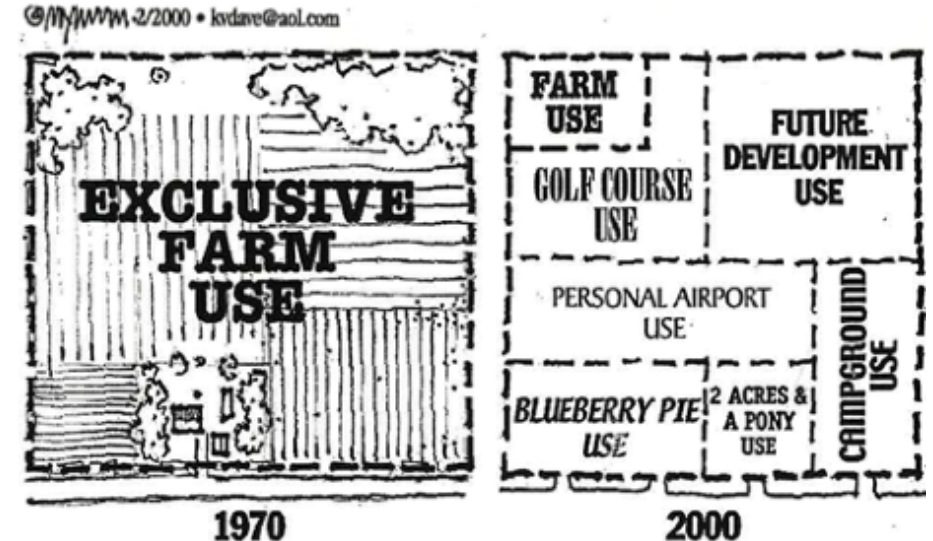
OREGON
DEPARTMENT OF
AGRICULTURE

Farmland Protection

Land Use Issues

- Over 50 farm and nonfarm uses are allowed in the “*exclusive*” farm zone.

- Supersiting
- Definitions
- Siting standards?
- Specific Land Uses
- Compatibility, Farm Impacts Test
- Cumulative Impacts



The evolution of agricultural land use in Oregon.



OREGON
DEPARTMENT OF
AGRICULTURE

Nonfarm Development Specific Land Uses

- **Open Space and Recreational Uses**
 - Trails
 - Parks
 - Agritourism
 - “incidental and subordinate,”
 - “necessary to support”
 - Wetlands
- **Aggregate Mining**
- **Commercial uses “in conjunction” with farm use**
- **Home occupations**
- **Energy Facility Siting**



Key Issues with Energy Facility Development

- Land conversion, individual and cumulative
- Jurisdiction, EFSC v. local
 - Approval criteria
- Consideration of “high-value” farmland
- Speculative land/rent values
- Compatibility with area farm and ranch operations
- Water rights “conversion”
- “Co-use.” Limitations on future production choices and practices
- Cumulative Impacts



OREGON
DEPARTMENT OF
AGRICULTURE

Farmland Protection

Land Use Issues: Dwellings

- “Nonfarm” dwellings, (NFDs, STRs, “replacement” Dws, “farm” dwellings)
- Speculative land values



OREGON
DEPARTMENT OF
AGRICULTURE

Farmland Protection Land Use Issues

- Regulation of farm use and Right to Farm



OREGON
DEPARTMENT OF
AGRICULTURE

Farmland Protection

Land Use Issues: Urban Growth

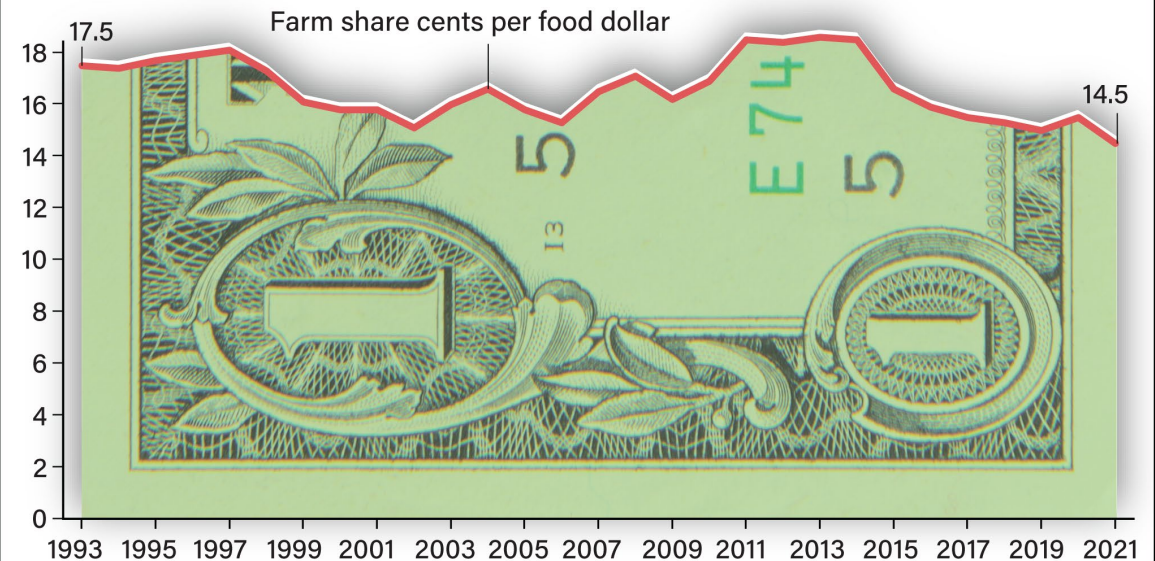
- **Urban growth boundaries continue to expand, sometimes onto cropland.**
 - 20-year land supply
 - Coordinated population allocation
 - Regional growth allocation?
 - Buffers
 - Infrastructure
 - Supersiting



**OREGON
DEPARTMENT OF
AGRICULTURE**

Other Key Issues Impacting Oregon Agriculture: Competitiveness

- High cost of labor
- Cost of other inputs (e.g. fuel, fertilizer, electricity...)
- Complex regulatory environment
- Labor housing shortage



Note: The food dollar estimates provide the average farm share and marketing share of each dollar spent on domestically produced food in a year.

Source: USDA, Economic Research Service, Food Dollar Series.

Trends

- **UGB expansions**
- **Water supply, drought and climate. The new normal?**
- **Local food, land “suitability” changes?**
- **New crops**



**OREGON
DEPARTMENT OF
AGRICULTURE**

Final Points

- Oregon agriculture is incredibly diverse
- Agriculture is important to Oregon's economy
- Agricultural land is not an undeveloped environment
- Agriculture is land and soil dependent
- Agricultural practices can be impacted by nonfarm development
- And don't forget water



**OREGON
DEPARTMENT OF
AGRICULTURE**



Questions?

Jim Johnson
Land Use and Water Planning Coordinator
Oregon Department of Agriculture

james.johnson@oda.oregon.gov



OREGON
DEPARTMENT OF
AGRICULTURE