

ORGANIC MEAT PRODUCTION IN THE UNITED STATES

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Background

The 1990 United States Farm Bill included provisions for the development of uniform U.S. standards for organic foods entitled the Organic Foods Production Act (OFPA). This legislation designated a National Organic Standards Board (NOSB), appointed by the Secretary of Agriculture to advise the USDA in developing and implementing those standards. During the four years of its existence the NOSB has been considering standards issues affecting producers and handlers of every agricultural commodity resulting in the promulgation of recommendations to the USDA. These, after legal documentation, are to be published in the Federal Register and will be subject to public comment before becoming law possibly by October 1996.

The OFPA addresses the need for a clear definition of "organic" across the 50 United States. Before 1990, 19 states had implemented organic food labeling laws. Today, with the federal act still unimplemented, 28 states have laws in effect that pertain to the marketing of organic products, and these laws differ in their extent of applicability, permitted production inputs, and requirements for certification. Furthermore, 43 certification organizations currently provide third-party oversight of the production, processing, and handling of products intended to bear the organic label. Of these, 11 are state government-administered, and 32 are grassroots organizations or small private agencies. All of these certifiers will be required to undergo accreditation by the USDA, once the OFPA is implemented, to ensure a minimum uniformity in the application of standards. The greatest volume of organic food production is in vegetables, fruits, grains, and dry beans. However, much of the organically managed land is used to produce feed and forage crops for livestock (26% of certified organic cropland in 1994), and recently, the production of meat, eggs, and especially dairy, has increased.

What is Organic?

The meaning of the term organic differs across certification organizations, production regions, and the consuming public. In the minds of many, it signifies: crops produced without synthetic chemical fertilizers, pesticides, and herbicides; livestock raised on organic feed and without use of synthetic pesticides and parasiticides, antibiotics, or growth hormones; and packaged foods without synthetic ingredients. However, the reality of farming and of processing agricultural products with today's environmental and marketing conditions may dictate that standards implemented under the OFPA allow for some exceptions to this definition.

Consumers demand authenticity when paying premium prices for organic products. Thus, an accreditation program providing oversight of organic certifiers is essential to fostering consumer confidence in the organic label. With the USDA accreditation program under development, some certifiers have turned to the International Federation of Organic Agriculture Movements (IFOAM) for accreditation and global seal recognition. The documentation "paper trail" monitored by accredited certifiers will be the key to maintaining the integrity of the organic label as products pass through the phases of farm-level production and post-harvest handling, processing, packaging, labeling, storage, transport, and marketing. Verification of adherence to the OFPA's implementing regulations will be required at each level.

Organic Food Production Increasing in the United States

Organic production practices were carried out on more than a million acres (400,000 hectares) of U.S. farmland in 1994, by approximately 4,050 certified organic farmers. A rapid expansion of acreage and particularly number of livestock is expected to follow the USDA implementation of national organic standards. Presently, only about 5% of certified organic farmers raise livestock in the United States.

Certified organic farmland has more than doubled over the past five years, despite the delay in federal rules. Acreage under organic certification represents approximately 0.1% of total U.S. agricultural land as noted in Table 1.

Proportionately more organic acreage is in the production of crops. Cropland is partitioned into its specific usage in Table 2.

Livestock and Livestock Products

Livestock raised organically in the United States provides a wide range of products typical of the American diet: dairy, eggs, beef, pork, and poultry. Some more exotic species have also been certified organic, including bison, quail, and ostriches. Paralleling the conventional farming sector, approximately half of U.S. agricultural land under organic management is pasture or rangeland. Table 3 describes U.S. certified organic feed acreage in 1994: roughage includes hay, silage, and greenchop; and concentrates include grains and protein supplementary feeds such as soybeans.

It has been difficult to assess the market for organic meat because the USDA's Food Safety and Inspection Service (FSIS), which oversees the labeling of meat in the United States, has prohibited the use of the term "organic" in marketing meat until the OFPA is implemented. Dairy and egg products, regulated by a different federal agency, have been allowed to be marketed with the organic label. Indeed, the United States has seen an increase of 169% in the number of dairy cows certified organic from 1991 to 1994 (Table 4), and sales of organic dairy products jumped 125%, from \$11 million

in 1993 to \$24 million in 1994, in just one year.

The federal restriction on applying the organic label to meat products appears to have dampened the production of meat animals. In fact, since 1992, the number of beef cows certified organic has been halved (from 6,796 head in 1992 to 3,300 head in 1994). States have hesitated to certify livestock products in general, with only two states providing services to livestock producers and most livestock production certified by private organizations. With labeling restrictions lifted under implementation of the OFPA, organic livestock production will likely increase appreciably. Meat poultry has continued to expand in the face of labeling restrictions, with five times the number of birds certified in 1994 (110,000) compared to 1992 (17,382). Much of this production may be being marketed as "natural" in the booming natural food supermarket chains.

What is Ahead?

The U.S. market for organic products has been growing an average of 20% each year for five years, to sales of \$2.3 billion in 1994.

Table 5 gives evidence of the expanding numbers of organic producers, processors/handlers, and retailers during the most recent four years in the United States. These data show percentage gains across the categories of organic certificate holders: a 43% increase in the total number of organic farmers; a 73% increase in the number of livestock producers; and a 107% increase in the number of processor/handlers. Although only a 35% increase in number of retail stores certified is shown for years 1993-1994, close to ten times the 1994 figure were certified in 1995.

USDA implementation of NOSB recommendations through its National Organic Program (NOP), will create an official definition of organic for the labeling and marketing of meat, milk, and poultry products. Hence it is expected that livestock product sales will increase by 40% the year the OFPA takes effect.

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Table 1. Certified Organic Acreage as a Subset of U.S. Farmland

U.S. Census Category	U.S. Farm Acres	Proportion of Total U.S. Acres (percent)	Organic Acres	Proportion of Organic Acres (percent)
Total	945,531,506.	100.0	1,127,000.	100.0
(Cropland	434,944,493.	46.0	668,690.	59.0
(Produce	8,553,136.	0.9	90,676.	8.0)
(Other Crops	426,391,357.	45.1	578,014.	51.0)
Pastureland & Rangeland	411,306,205.	43.5	446,600.	40.0
Woodland	73,751,457.	7.8	11,280.	1.0
Other Land	25,529,351.	2.7	430.	>1.0

Table 2. 1994 Certified Organic

Cropland Category	Certified Organic Acreage	Percentage of Organic Cropland
Food Crops	382,086.	57
Livestock Feed	174,514.	26
Fallow	91,160.	14
Cotton	17,495.	<3
CRP Land	2,250.	<1
Nursery & Floral	113.	<1
Tobacco	8.	<1
Misc. Crops	1,064.	<1
Total	668,690.	100

Table 3. 1994 Certified Organic Livestock Feed

	Acres	Percentage of Feed
Roughage	98,084.	56
Concentrates	76,430.	44
Total Feed	174,514.	100

Table 4. Certified Organic Livestock, 1992-1994

Livestock	Number Certified 1992	Number Certified 1994	% Change
Beef Cattle	6,796.	3,300.	-106.
Dairy Cattle	2,265.	6,100.	169.
Meat Poultry	17,382.	110,500.	533.
Layer Hens	43,981.	47,700.	8.
Lambs/Sheep	1,221.	1,600.	31.
Swine	1,365.	2,100.	54.

Table 5. U.S. Organic Producers, Processors/Handlers & Retailers 1991 Through 1994 Summation

	1991 Number	1994 Number	% Change
Total Farmers	2,841.	4,060.	43.
Produce Growers	2,025.	2,971.	47.
Livestock Producers	114.	197.	73.
Processors/Handlers	254.	526.	107.
Retailers	23.	31.	35.