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AMERICA'S FARMS AND RANCHES AT A GLANCE: 2025 EDITION

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Overview

Farms in the United States represent a diverse set of business operations and farm operators (producers). This annual report presents updated statistics on the characteristics of U.S. farms and ranches using the most recent data from the Agricultural Resource Management Survey (ARMS), an annual survey conducted jointly by USDA, National Agricultural Statistics Service (NASS) and USDA, Economic Research Service (ERS). Statistics for calendar year 2024 are presented using a farm classification developed by USDA, ERS to categorize farms into groups with some common characteristics. The classifications used are mainly based on each farm's annual gross cash farm income and ownership (family versus nonfamily) and, in

some cases, the main occupation of the farm's principal producer. This edition also contains two new, one-time sections that address contemporary topics. The first provides statistics on direct sales of edible and non-edible agricultural products. In this report, direct sales are defined as the process of marketing crops, livestock, poultry, or other agricultural products produced on the farm directly to consumers, retail markets, institutions, or intermediate markets. The second uses combined land tenure and organic acreage information collected in 2024, which has not been available in previous years, to summarize transitioning and certified organic acreage by ownership type (rented versus owned land), region, and farm specialization.

Errata

On February 17, 2026, the legend in figure 6 was changed to include the correct value for U.S. median wealth and the source was updated to list the correct year for the Survey of Consumer Finances. No additional text or figures were impacted by these changes.

Farm Typology

Since the 1970s, USDA has defined a farm as any place that, during a given year, produced and sold (or normally would have produced and sold) at least \$1,000 of agricultural products or has government payments and sales that exceed \$1,000 (not adjusted for inflation). USDA uses acres of crops and head of livestock to determine whether a farm or ranch with sales of less than \$1,000 could normally produce and sell the minimum amount required to be categorized as a farm. To categorize farms into groups with some common characteristics, USDA, Economic Research Service (ERS) developed a farm typology, which was last updated in 2013.¹ The farm typology first distinguishes between nonfamily and family farms, where a family farm is a farm in which the majority of the business is owned by a producer and/or any individual related by blood, marriage, or adoption, including relatives who do not live in the producer's household. Among family farms, farms are divided by farm size, which is measured by gross cash farm income (GCFI). GCFI is a measure of the farm's revenue that includes sales of crops and livestock, government payments, other farm related income, and fees received by operators from production contracts. Small family farms are further divided into categories based on the primary occupation of the principal producer.

¹ Details of the typology update can be found in the USDA, ERS report: Hoppe, Robert A., & James M. MacDonald. (2013). Updating the ERS Farm Typology (Report No. EIB-110). U.S. Department of Agriculture, Economic Research Service.

This report used data from the Agricultural Resource Management Survey (ARMS), an annual survey conducted by USDA, National Agricultural Statistics Service (NASS) and USDA, Economic Research Service (ERS). The analysis in this report is based on a total sample of approximately 18,250 farms from the 2024 ARMS.

Small family farms (GCFI less than \$350,000)

- **Retirement farms:** Farms whose principal producers report having retired from farming while continuing to farm on a small scale.
- **Off-farm-occupation farms:** Farms whose principal producers report a primary occupation other than farming.
- **Farming-occupation farms:** Farms whose principal producers report farming as their primary occupation. Farming-occupation farms are further sorted into two classes:
 - **Low sales:** Farms with a GCFI of less than \$150,000.
 - **Moderate sales:** Farms with a GCFI between \$150,000 and \$349,999.

Midsize family farms (GCFI between \$350,000 and \$999,999)

Large-scale family farms (GCFI of \$1,000,000 or more)

- **Large farms:** Farms with a GCFI between \$1,000,000 and \$4,999,999.
- **Very large farms:** Farms with a GCFI of \$5,000,000 or more.

Nonfamily farms

- Any farm where any producer and any related individuals do not own a majority (50 percent) of the business.

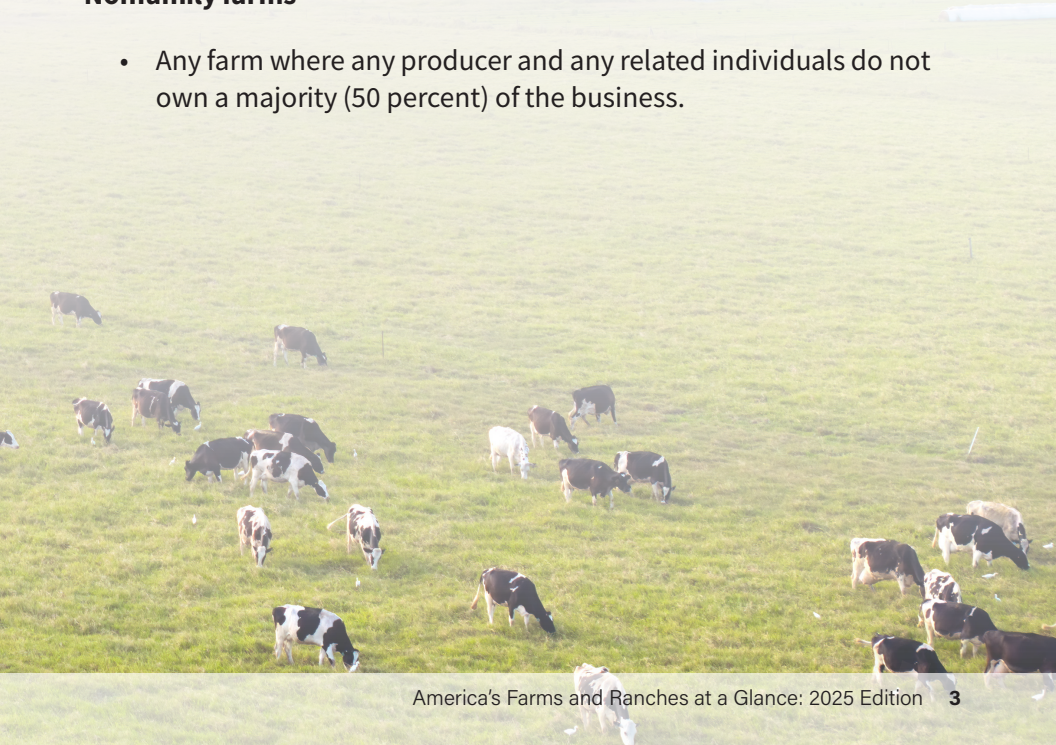


Table 1
Number of farms and distribution of farms, value of production, and acres operated by farm type, 2024

Farm type		Number of farms	Percentage of farms	Percentage of acres operated	Percentage of value of production
Small family farms	Retirement	216,811	11.6	4.4	1.1
	Off-farm occupation	730,704	39.0	12.9	4.4
	Low sales	579,158	30.9	14.7	4.1
	Moderate sales	92,107	4.9	8.4	7.6
Midsize family farms		113,966	6.1	18.3	18.4
Large-scale family farms	Large	78,020	4.2	27.3	30.4
	Very large	8,788	0.5	5.3	19.8
Nonfamily farms		52,767	2.8	8.9	14.2
All farms		1,872,321			

Note: Acres operated is equal to owned land plus leased land minus leased land to others. In 2024, the total acres operated were 880.4 million, and the total value of production was \$500.9 billion. Due to rounding, percentages may not sum to 100 or match values reported in figure 1.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

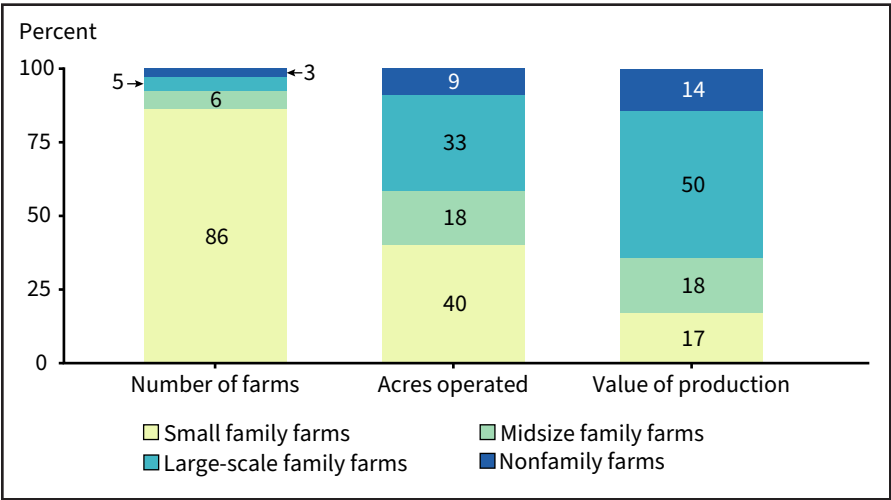
Farms, Production, and Farmland

Most U.S. farms (86 percent) are small family farms, however, these farms operated just 40 percent of U.S. agricultural land and accounted for 17 percent of the total value of production (figure 1).

- In 2024, small family farms remained the most prevalent farm type since the introduction of the farm typology, accounting for 86 percent of all U.S. farms. Despite small farms representing a large share of total farms, they operated only 40 percent of agricultural land and contributed just 17 percent of the total value of production. Value of production is calculated from the total value of cash sales received by the operation in 2024. It includes sales from any year’s production and sales under production contract.

- Large-scale family farms, though fewer in number (5 percent of farms), contributed significantly to the value of production, representing 50 percent of total production value and 33 percent of acres operated.
- Midsize family farms made up 6 percent of farms, operated 18 percent of U.S. farmland, and contributed 18 percent of production value.
- Nonfamily farms accounted for 3 percent of farms but contributed 14 percent of the total value of production, both of which are a decrease from 2023.² Nonfamily farms vary widely in size, income, and ownership structure and could include partnerships of unrelated persons, nonfamily corporations, and farms with a hired manager unrelated to the owners. In 2024, 21 percent of nonfamily farms had a GCFI of \$1 million or more.

Figure 1
Farms, acres operated, and value of production by farm type, 2024



Note: Acres operated is equal to owned land plus leased land minus leased land to others.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

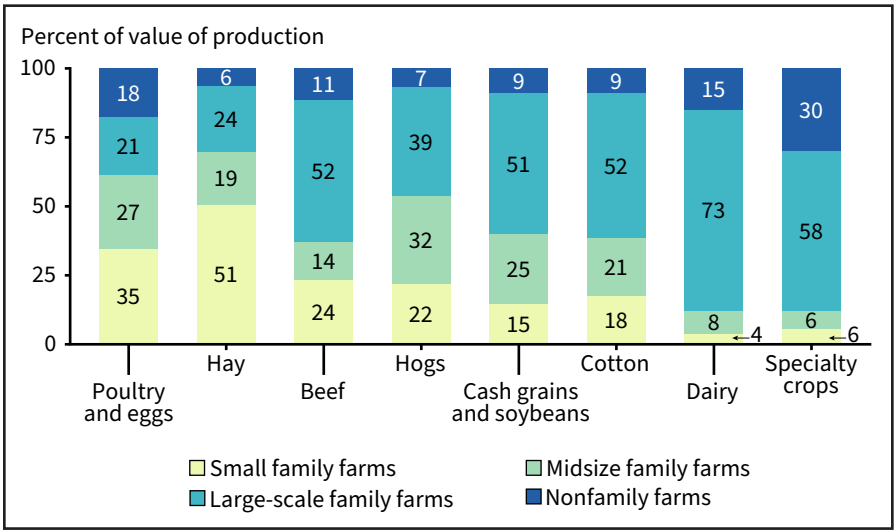
² All written comparisons to statistics for calendar year 2023 are statistically significant at the 10 percent significance level.

In 2024, the value of agricultural products varied by farm type, with large-scale family farms dominating many commodities (figure 2).

- In 2024, large-scale family farms accounted for the majority of production value in beef (52 percent), cash grains and soybeans (51 percent), cotton (52 percent), dairy (73 percent), and specialty crops (58 percent). These farms accounted for a smaller proportion of production value in poultry and eggs (21 percent), hay (24 percent), and hogs (39 percent).
- Nonfamily farms contributed 30 percent of the value of specialty crop production, the highest share held by this group in any commodity category. Their contribution to other sectors ranged from 6 to 18 percent of the value of production.
- Small family farms accounted for 51 percent of the value of hay production and 35 percent of poultry and egg production. These sectors may be more accessible to smaller-scale operations due to their suitability on small acreage and the contracting structure of poultry and egg production. Small family farms also contributed significantly to beef (24 percent) and hog production (22 percent), but they had a smaller role in dairy (4 percent) and specialty crops (6 percent) production.
- Midsize family farms contributed from 6 to 32 percent of production value across the commodities shown. Their most notable roles were in hogs (32 percent), poultry and eggs (27 percent), and cash grains and soybeans (25 percent).
- Compared with 2023, a smaller portion of poultry and egg production occurred on small and midsize family farms while a larger portion of poultry and egg production occurred on large-scale family farms in 2024. On the other hand, large-scale family farms accounted for a smaller proportion of the value of cotton production in 2024 compared to 2023; while midsize family farms accounted for a larger portion of cotton production. Nonfamily farms accounted for less cattle and hog production in 2024 compared to 2023.

Figure 2

Value of production of selected commodities by farm type, 2024



Note: Cash grains include barley, corn, rice, sorghum, wheat, and oats. Specialty crops is a broad term that includes fresh or dried fruits, tree nuts, vegetables, beans (pulses), and horticulture nursery crops. Due to rounding, numbers within the columns may not add to 100 percent.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

Farm Financial Performance

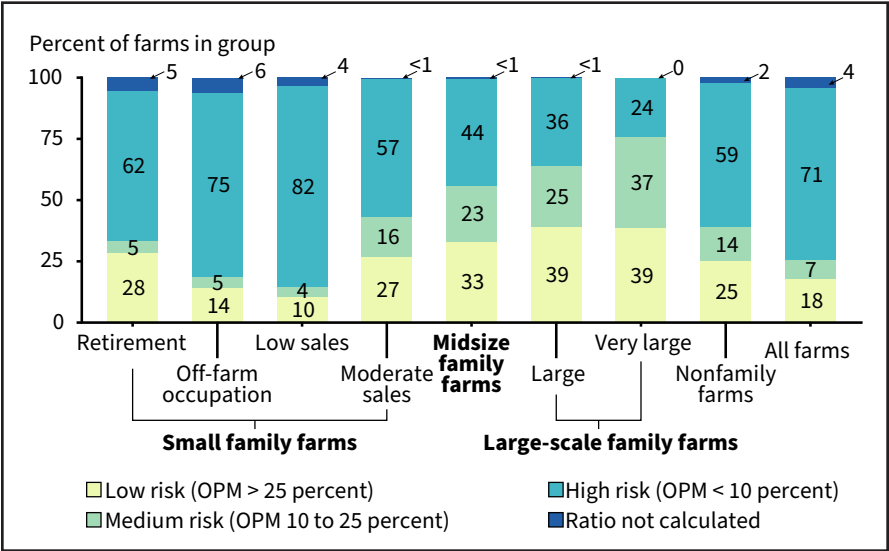
One measure of a farm's financial performance is the operating profit margin (OPM), the share of gross income that is profit. Using the OPM, farms can be classified into three different financial vulnerability categories. Low financial risk has an OPM greater than 25 percent, medium risk has an OPM between 10 percent and 25 percent, and high risk has an OPM less than 10 percent.

Most U.S. farms—especially small family farms—operated with low profit margin and high financial risk, while very large family farms demonstrated the strongest profitability and potential resilience.

- Across all small family farm types, a majority operated with an OPM below 10 percent, indicating high financial vulnerability. Specifically, 62 percent of retirement farms, 75 percent of off-farm occupation farms, 82 percent of low-sales farms, and 57 percent of moderate sales farms were in the high-risk zone in 2024 (figure 3).
- Operating profit margin improved with farm scale. Midsize and large-scale family farms were more likely to operate in the medium risk (OPM 10 to 25 percent) and low risk (OPM > 25 percent) zones compared to small family farms.
- Compared to 2023, a larger proportion of midsize family farms operated in the high-risk zone in 2024. This change was accompanied by a smaller portion of these farms in the low-risk zone in 2024 compared to 2023.
- Very large family farms are the most financially resilient group, with a combined 76 percent in the low-risk and medium-risk categories in 2024.
- Nonfamily farms displayed a mixed financial vulnerability profile in 2024. These farms had 25 percent of operations in the low-risk category and 14 percent in the medium-risk category, but a majority of farms (59 percent) were in the high-risk zone.
- Overall, 71 percent of farms operated in the high-risk zone in 2024 compared to 69 percent in 2023.



Figure 3
Farms by operating profit margin and farm type, 2024



Note: The operating profit margin (OPM) ratio is defined as:

$$100 \times \left(\frac{\text{net farm income} + \text{interest expense} - \text{returns to unpaid labor and management}}{\text{gross farm income}} \right)$$

OPM ratios are not calculated for operations with 0 or negative gross farm income as the OPM for these operations are undefined or do not reflect the financial position of the farm operation. Gross farm income can be negative due to decreases in the value of inventory. Due to rounding, numbers within the columns may not add to 100 percent.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

Farm Use of Credit and Loan Amounts

Debt is an important resource for farmers and ranchers to support the capital needs of their operations. This section reports the share of farms in each farm type that held farm debt at the end of 2024 to highlight differences in the use of agricultural credit across operations. The average loan amounts for farms that report having debt (conditional average), the conditional 10-year average (adjusted for inflation), and the size of debt relative to GCFI are also examined.

Debt amounts and usage rise with farm size, while debt-to-GCFI ratios are smaller for larger farms.

- Among all farm types, very large family farms had the highest conditional average debt at \$3.9 million in 2024 and the highest 10-year conditional average at \$5.1 million. Despite this, their average debt-to-GCFI ratio was just 0.4, indicating their income, on average, is greater than the debt held (table 2).
- Large family farms had an average debt-to-GCFI ratio of 1.0 indicating that, on average, their farm debt was roughly equal to their farm income. In 2024, the conditional average debt for large family farms was \$1.6 million, which is very similar to the previous 10-year conditional average.
- Midsize and large-scale family farms are the most likely to carry debt. In 2024, a majority of midsize family farms (66 percent), large family farms (78 percent), and very large family farms (78 percent) had debt. This contrasts with small family farms—specifically retirement, off-farm occupation, and low sales farms—where less than 23 percent had any debt.
- Small family farms had lower absolute debt levels but higher average debt-to-GCFI ratios than midsize and large-scale family farms. Retirement, off-farm occupation, and low-sales farms had conditional average debt ranging from \$179,500 to \$211,600 and debt-to-GCFI ratios ranging from 9.3 percent to 16.9 percent, respectively.
- More than half (53 percent) of moderate sales small family farms had debt, with an average conditional debt of \$460,600 and a debt to GCFI ratio of 1.9. Moderate sales farms' use of debt in their operations more closely resembles that of midsize family farms than other small family farm types.
- Twenty-six percent of nonfamily farms report having debt in 2024, which is less than other farm types except for retirement, off-farm occupation, and low-sales farms. Of the farms that report having debt, the average debt for nonfamily farms was \$1.7 million and average debt-to-GCFI ratio of 1.6.

Table 2

Farm debt by farm type, 2024

Farm type		Share with any debt (percent)	Conditional average debt (thousand dollars)	10-year conditional average debt (2024 thousand dollars)	Average ratio of debt to GCFI
Small family farms	Retirement	10	211.6	150.0	9.6
	Off-farm occupation	22	196.8	178.7	16.9
	Low sales	19	179.5	184.1	9.3
	Moderate sales	53	460.6	501.5	1.9
Midsize family farms		66	785.8	851.2	1.4
Large-scale family farms	Large	78	1,617.5	1,648.5	1.0
	Very large	78	3,904.6	5,081.7	0.4
Nonfamily farms		26	1,684.0	1,365.6	1.6
All farms		27	574.0	484.9	8.3

GCFI = gross cash farm income.

Note: The conditional average is the average debt among farms that report having any debt balance on December 31, 2024. Therefore, farms that report a balance of \$0 are not included in the conditional average calculation. The 10-year conditional average debt is adjusted to 2024 dollars using the Consumer Price Index.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data and U.S. Bureau of Labor Statistics, Consumer Price Index for All Urban Consumers: All Items in U.S. City Average.

Government Payments and Federal Crop Insurance

In 2024, small family farms received the largest share of overall Government payments—especially through the Conservation Reserve Program—while large-scale family farms were the biggest recipient of commodity-linked, countercyclical payments.

- In 2024, small family farms received 46 percent of all government agricultural program payments. These farms comprised 86 percent of all U.S. farms and 17 percent of production value. Large-scale

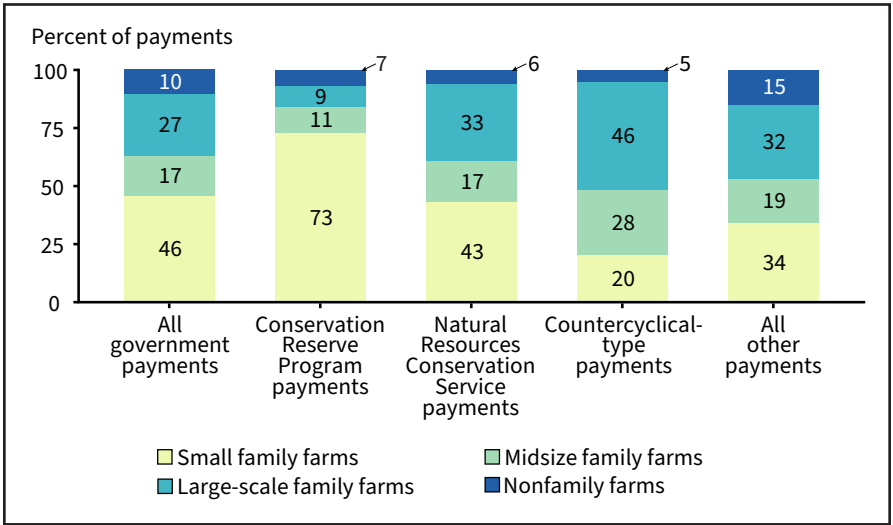
family farms received 27 percent of payments, and accounted for 5 percent of farms and 50 percent of the value of production. Mid-size family farms (6 percent of farms and 18 percent of the value of production) received 17 percent while nonfamily farms (3 percent of farms and 14 percent of the value of production) received 10 percent of government payments (figure 4).

- Conservation Reserve Program (CRP) payments were overwhelmingly directed to small family farms, which received 73 percent of CRP payments. Additionally, these farms received 43 percent of payments from the USDA's Natural Resources Conservation Service.
- Small farms received 20 percent of countercyclical-type payments. These payments, which include the Agricultural Risk Coverage (ARC) and Price Loss Coverage (PLC) programs, provide enrolled farm operations with assistance when revenues or prices for a particular commodity are low.
- Large-scale family farms received the largest share of countercyclical-type payments at 46 percent. Because these payments are tied to commodity programs and risk management, farms with higher production volumes of eligible commodities and market exposure are likely to receive larger payments.
- Nonfamily farms represent the smallest share of all U.S. farms and received the smallest share of all types of Government agricultural payments.



Figure 4

Distribution of selected Government agricultural program payments by farm type, 2024



Note: USDA, Natural Resources Conservation Service payments include payments from the Environmental Quality Incentives Program (EQIP) and the Conservation Stewardship Program (CSP). Countercyclical-type payments include payments from the USDA, Farm Service Agency (FSA) Price Loss Coverage and Agriculture Risk Coverage programs. All other payments include those from programs, such as the USDA, FSA's Dairy Margin Coverage program, as well as agricultural disaster payments and ad hoc programs. Government payment statistics included in this figure rely on self-reported payment data. Due to rounding, numbers within the columns may not add to 100 percent.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

Midsize and large-scale family farms accounted for the largest share of indemnity payments in 2024.

- Overall, 15 percent of U.S. farms participated in Federal crop insurance programs in 2024. However, the share of row crop (cotton, corn, soybeans, wheat, peanuts, rice, or sorghum) producers that participated in Federal crop insurance programs (62 percent) was much higher than for other types of operations. In contrast, 19 percent of specialty crop (fruit and tree nuts, vegetables, or nursery crops) operations and 12 percent of livestock operations purchased Federal crop insurance in 2024.
- Large family farms accounted for 18 percent of crop insurance participants, 38 percent of all harvested cropland acres, and received 45 percent of total indemnities in 2024. Midsize family farms made

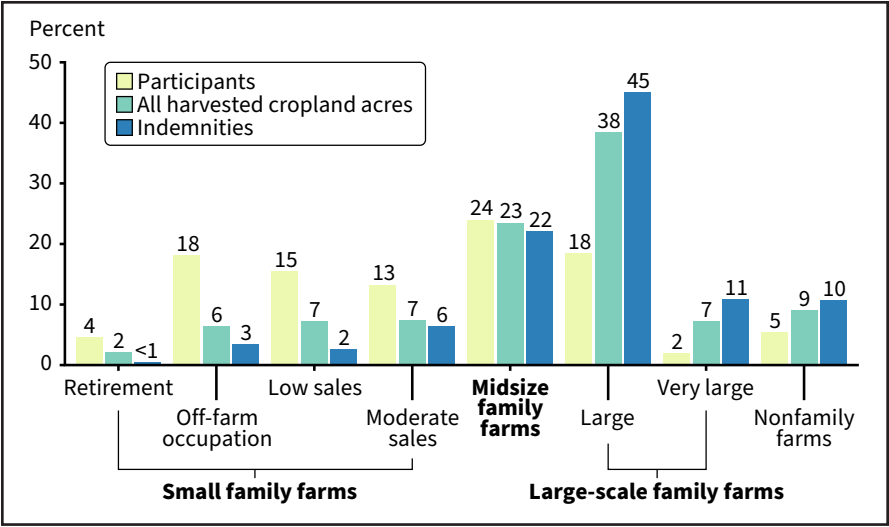
up 24 percent of participants and accounted for 22 percent of indemnities (figure 5).

- The percentage of participants that were small family farms was relatively high, but their share of harvested cropland acres and indemnity payments are low. For example, off-farm occupation farms made up 18 percent of participants but only 3 percent of indemnity payments.
- Very large farms represented only 2 percent of participants but accounted for 7 percent of harvested acres and 11 percent of indemnity payments.
- Nonfamily farms accounted for 5 percent of crop insurance participants and received 10 percent of indemnity payments in 2024, down from 7 percent of participants and 18 percent of indemnity payments in 2023.
- Indemnity payment amounts depend on eligibility for the program, the amount of crop insured, and the existence of an event prompting an insurance payout. These factors vary by farm specialization, location, and size.



Figure 5

Distribution of Federal crop insurance participants, total harvested cropland, and indemnities by farm type, 2024



Note: Crop insurance participation is determined by an individual's response to a survey question asking about the operation's expenses for Federal crop insurance. Operations with no Federal crop insurance expenses are assumed to not participate in crop insurance. Indemnity payment statistics rely on self-reported indemnity payments. Due to rounding, the bars of the same color may not add to 100 percent.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

Farm Operator Household Well-being

This section presents information on the farm household for the principal operator (i.e., the operator most responsible for decision making) of each farm operation. Only family farm households are included here because household-level statistics are not calculated for nonfamily farm operations. Household-level statistics include various income and wealth measures. Total household wealth is the sum of the household's portion of net worth from the farming business and the household's non-farming net worth. Farming net worth is apportioned to the household based on its ownership of the business. Net worth of each type is equal to assets minus debt. Farm business assets include physical assets (e.g., value of land and buildings) and financial assets. Non-farm assets include the physical assets of the household and financial assets of the household

(e.g., value of cash, checking, CDs, money market accounts, 401K, etc.). Farm business debt includes farm loans while non-farm debt includes household-level debt (e.g., value of real estate debt, nonreal estate debt, value of credit cards, car payments, etc.).

In 2024, a substantial share of family farm households—especially among small family farms—earned below-median incomes, yet the vast majority held wealth above the national median, reflecting the high asset but income-variable nature of U.S. farm households (figure 6).

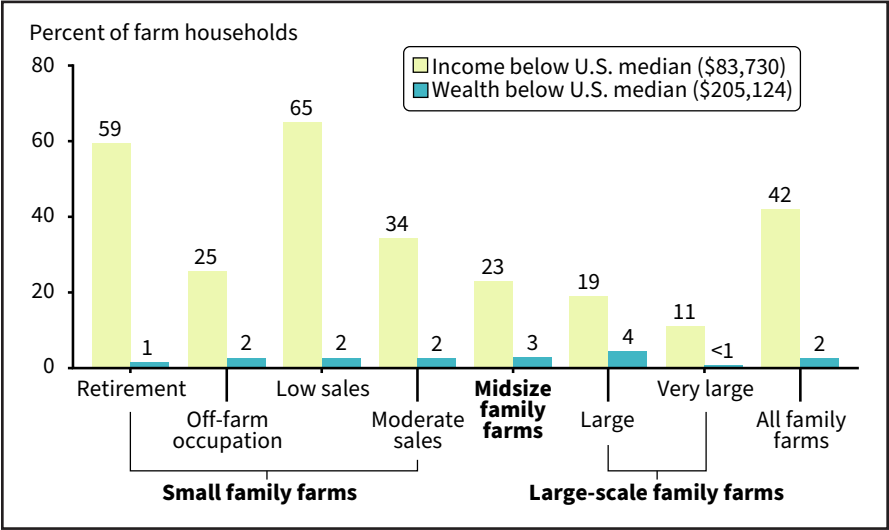
- A large share of small family farm households had income below the U.S. median of \$83,730. Among small family farms, 59 percent of retirement, 25 percent of off-farm occupation, 65 percent of low-sales, and 34 percent of moderate-sales households had incomes below the U.S. median in 2024, highlighting the limited income-generating capacity of many small-scale operations.
- Despite lower incomes, the vast majority of farm households had wealth above the national median. Across all family farm types, only 1–4 percent of households had wealth below the U.S. median, underscoring that while income may be low, farm households often hold substantial wealth in land and assets.
- Households operating very large family farms had a median income of \$1.25 million and median wealth of \$9.3 million—the highest across all farm types—driven by both farm earnings and accumulated assets (table 3).



- Moderate-sales small family farms exhibited relatively strong asset positions despite comparatively modest incomes. With a median income of \$115,600 and median wealth of \$2.6 million, these farm households had wealth levels most similar to midsize family farms, which had a median income of \$206,700 and median wealth of \$3.4 million in 2024.
- Across all family farms, income differences are more pronounced than differences in wealth. While 42 percent of all family farm households had income below the national median, just 2 percent had wealth below the median (figure 6).
- Off-farm income is a primary source of income for the majority of farm households. Across all family farms, 86 percent of households earned more than half their total income from off-farm sources. This is especially important for small family farms, with at least 90 percent of retirement, off-farm occupation, and low-sales farms receiving a majority of income from off-farm sources (figure 7).
- In 2024, a majority of small family farm households had negative farming income, with 52 percent of retirement farms, 68 percent of off-farm occupation farms, and 63 percent of low-sales farms reporting losses from farm operations. Moderate sales small family farm households were less likely to report farming losses at 24 percent.



Figure 6
Share of principal producer households with income and wealth below the U.S. median by farm type, 2024



Note: Farm households are the households of the principal producer on family farms. Producer household income and wealth are not estimated for nonfamily farms. Wealth is the value of household assets minus household debt. Producer household income includes both the farm and off-farm income household members received. Given that net income is a calendar-year flow, all income and expenses are included when they occur from January 1 to December 31. U.S. median wealth was adjusted to 2024 dollars using the Consumer Price Index.

Sources: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data; U.S. Department of Commerce, Bureau of the Census, 2024 Current Population Survey data; and the Federal Reserve Board, Board of Governors in cooperation with the U.S. Department of the Treasury, 2022 Survey of Consumer Finances.



Table 3
Principal producer household income and assets by source and farm type, 2024

Farm type		Median total household income	Average income			Median total wealth	Average total wealth
			Total	Farm	Off-farm		
		U.S. dollars (thousands)					
Small family farms	Retirement	70.8	96.6	8.9	87.7	1,549.2	2,334.1
	Off-farm occupation	133.7	167.7	-9.3	177.0	1,444.7	2,177.0
	Low sales	67.4	85.5	-4.2	89.6	1,463.5	2,189.3
	Moderate sales	115.6	128.6	43.7	84.9	2,605.8	3,807.2
Midsize family farms		206.7	234.2	123.0	111.2	3,392.5	5,236.5
Large-scale family farms	Large	396.7	479.4	361.3	118.0	4,836.0	7,253.0
	Very large	1,247.6	2,387.3	2,046.4	341.0	9,255.2	16,002.7
All family farms		102.7	159.3	31.3	128.0	1,611.1	2,758.2

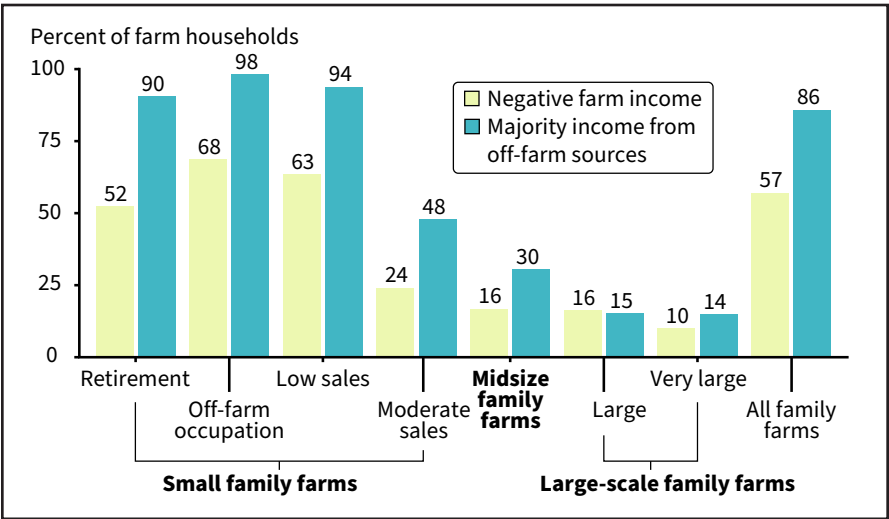
Note: Producer household income is not estimated for nonfamily farms. Off-farm income includes off-farm self-employment, wage/salary jobs, interest and dividends, benefits from Social Security and other public pensions, alimony, annuities, net income of estates or trusts, private pensions, unemployment income, and other income.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.



Figure 7

Share of principal producer households with negative farm income and a majority of their income from off-farm sources by farm type, 2024



Note: The percent of households earning 50 percent or more of total household income from off-farm sources is calculated using households with positive total household income. Off-farm income includes off-farm self-employment, wage/salary jobs, interest and dividends, benefits from Social Security and other public pensions, alimony, annuities, net income of estates or trusts, private pensions, unemployment income, and other income.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

Direct Sales of Edible and Non-Edible Agricultural Products

Direct sales channels are an important part of the agricultural sector as they provide farmers with alternative revenue streams outside the typical wholesale market. In 2024, direct sales accounted for 11 percent of total farm sales. For the purpose of the ARMS survey, USDA, NASS defines direct sales as the process of marketing crops, livestock, poultry, or other agricultural products produced on the farm directly to:

- **Consumers:** individuals who purchased agricultural products from farmers markets, on-farm stores or farm stands, roadside stands or stores, Community Supported Agriculture (CSA), online marketplaces, etc.

- **Retail markets:** supermarkets, supercenter, restaurants, caterers, independently owned grocery stores, food cooperatives, etc.
- **Institutions:** K-12 schools, colleges or universities, hospitals, workplace cafeterias, prisons, foodbanks, etc.
- **Intermediate markets:** businesses or organizations in the middle of the supply chain marketing locally- and/or regionally-branded products such as distributors, food hubs, brokers, auction houses, wholesale and terminal markets, food processors, etc.

Agricultural products include both unprocessed and processed (also known as value-added) products and edible and non-edible products produced by the farm operation. Edible products are those sold as food for humans to eat or drink while non-edible products are not for human consumption, such as hay, livestock fed or raised, cut flowers not for consumption, Christmas trees, nursery products, wool, etc.

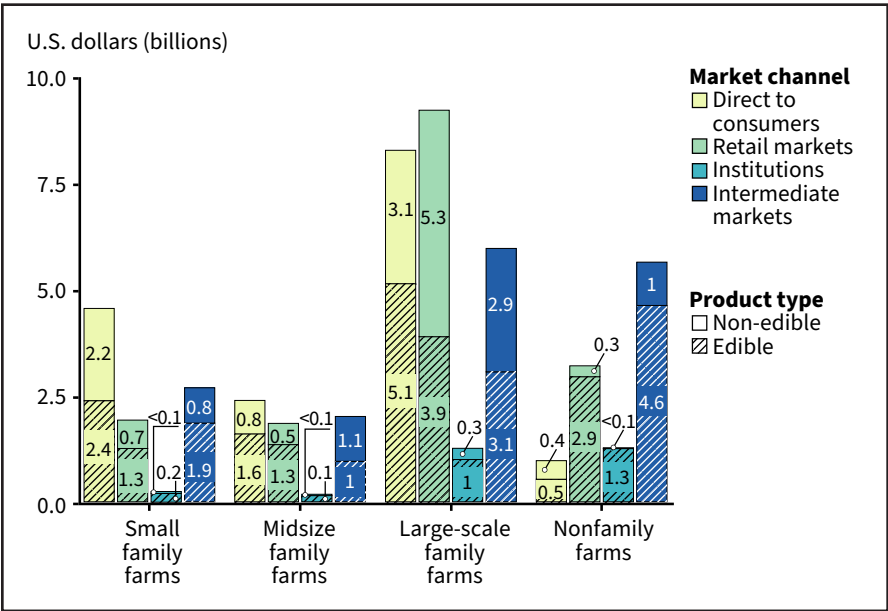
In 2024, large-scale family farms and nonfamily farms dominated overall direct farm sales—particularly through local retail and intermediate markets—while small family farms relied more heavily on direct-to-consumer channels (figure 8).

- In 2024, U.S. farms had about \$51.7 billion of agricultural products in direct sales, with \$32.2 billion of those sales from edible products and \$19.5 billion from non-edible products.
- Direct-to-consumer markets are particularly important for small and midsize family farms. Small family farms sold \$2.4 billion of edible and \$2.2 billion in non-edible products directly to consumers—more than any other direct market channel for these farms—highlighting the importance of local and niche markets for smaller operations.
- Large-scale family farms are the top sellers of direct sales products across all market channels. These farms generated about \$24.7 billion in total direct sales, with edible products more likely to be sold through direct-to-consumer and non-edible products more heavily concentrated in retail and intermediate markets.



- Intermediate markets are the largest distribution channel of direct sales for nonfamily farms. Nonfamily farms sold \$5.6 billion to intermediate markets compared to \$3.2 billion to retail markets, \$1.3 billion to institutions, and \$900 million direct-to-consumers in 2024.
- Edible products dominate direct sales through all marketing channels (figure 9). In particular, 88 percent of direct sales to institutions were edible products, highlighting the importance of food-related procurement through local networks in schools, hospitals, and other institutions.

Figure 8
Direct sales by market channel, product type, and farm type, 2024

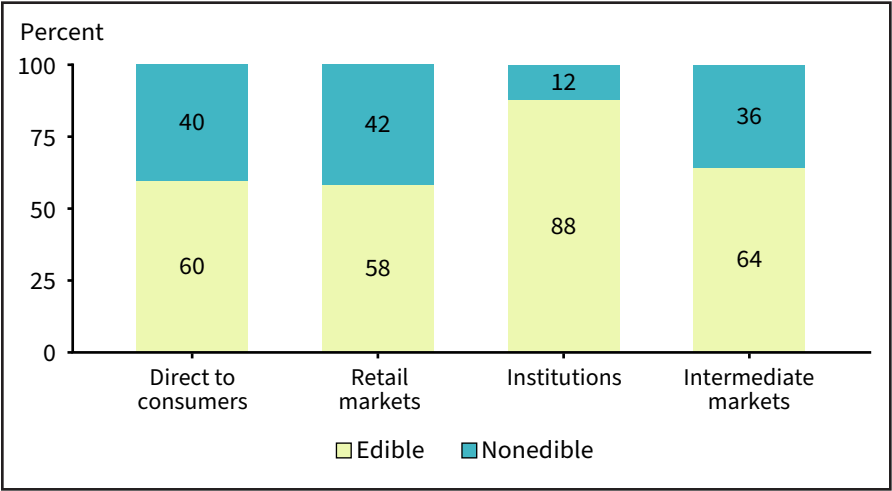


Note: Direct sales are any crops, livestock, poultry, or agricultural products sold directly to: **consumers** (individuals who purchased agricultural products from farmers markets, on-farm stores or farm stands, roadside stands or stores, Community Supported Agriculture (CSA), online marketplaces, etc.), **retail markets** (supermarkets, supercenter, restaurants, caterers, independently owned grocery stores, food cooperatives, etc.), **institutions** (K-12 schools, colleges or universities, hospitals, workplace cafeterias, prisons, foodbanks, etc.), or **intermediate markets** (businesses or organizations in the middle of the supply chain marketing locally- and/or regionally-branded products, such as distributors, food hubs, brokers, auction houses, wholesale and terminal markets, food processors, etc.). **Edible** products are those sold as food for humans to eat or drink. **Non-edible** products include hay, livestock fed or raised, cut flowers not for consumption, Christmas trees, nursery products, wool, etc.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

Figure 9

Share of direct sales by product type and marketing channel, 2024



Note: Direct sales are any crops, livestock, poultry, or agricultural products sold directly to: **consumers** (individuals who purchased agricultural products from farmers markets, on-farm stores or farm stands, roadside stands or stores, Community Supported Agriculture (CSA), online marketplaces, etc.), **retail markets** (supermarkets, supercenter, restaurants, caterers, independently owned grocery stores, food cooperatives, etc.), **institutions** (k-12 schools, colleges or universities, hospitals, workplace cafeterias, prisons, foodbanks, etc.), or **intermediate markets** (businesses or organizations in the middle of the supply chain marketing locally- and/or regionally-branded products, such as distributors, food hubs, brokers, auction houses, wholesale and terminal markets, food processors, etc.). **Edible** products are those sold as food for humans to eat or drink. **Non-edible** products include hay, livestock fed or raised, cut flowers not for consumption, Christmas trees, nursery products, wool, etc.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

Certified and Transitioning Organic Agriculture

Organic agriculture is a set of practices meant to build soil health, conserve biodiversity, and limit synthetic pesticide and herbicide use.³ Except for producers with gross annual sales below \$5,000, producers must become certified to market products as organic. Certification ensures

³ For more information on organic agriculture, see USDA, Agricultural Marketing Service. (2015). Introduction to organic practices.

that production and handling follow the USDA National Organic Program (NOP) standards. These standards prohibit the use of almost all synthetic pesticides and fertilizers, genetic engineering, use of ionizing radiation and sewage sludge, and antibiotics and growth hormones in organic livestock systems. Additionally, producers are required to take measures to build soil quality, such as the use of animal or green manures. To manage pests and disease producers use practices such as diversified crop rotations or biological controls rather than rely on pesticides. Organic livestock systems must allow for natural animal behaviors, including access to pasture for ruminants during the grazing season. The certification process requires a 3-year transition period in which the land must be managed according to NOP standards. As a result, farmers typically face reduced yields but may not market or label products from transitioning land as organic. Once certified, certification must be renewed annually through USDA-accredited certifiers, which includes scheduled and unannounced site visits.

While certified organic products generally command a price premium, organic acreage remains at less than 1 percent of total farmland in the U.S.⁴ The 3-year transition period and associated costs may create a barrier to organic land conversion, especially for renters who do not have assurance that the duration of their lease is sufficient to allow them to recoup investment costs. Perhaps consequentially, organic land rents and sells for higher average values than conventional land.⁵ To better understand patterns in organic land rental and ownership, ARMS asked farm operations about rented and owned organic acreage for the first time in 2024.⁶ The survey data show that patterns in the relative amounts of rented and owned organic land varied by region, certification status, farm size, and commodity specialization.

⁴ For more information and data on certified and transitioning organic land, see USDA, ERS report: Raszap Skorbiensky, S. (2025). *Organic Situation Report, 2025 Edition* (Report No. EIB-281). U.S. Department of Agriculture, Economic Research Service.

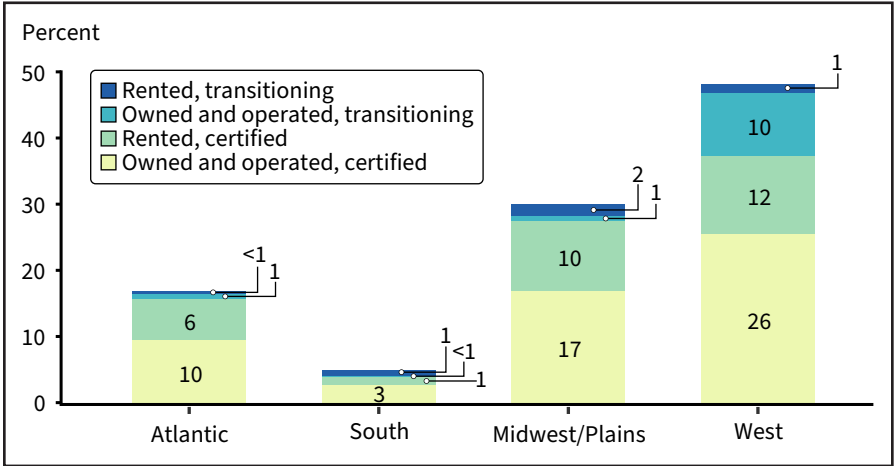
⁵ For more information on organic land markets, see Leonard, E., Koory, R., & Nourmir, A. (2020). *Understanding the effect of organic certification on U.S. farmland rental rates* (Mercoterra White Paper) and Fuller, K. B., Janzen, J.P., & Munkhnasan. B. (2021). Farmland rental rates: Does organic certification matter?. *Land Economics* 97(1): 80–106.

⁶ Note that ARMS is not designed to be representative of organic acres or farms. While we did compare and validate the results with existing published estimates, estimates reported here should not be interpreted as population statistics. However, comparisons with the 2019 and 2021 USDA, NASS Organic Surveys show estimates within the confidence intervals of our survey results.

The distribution of organic land ownership varied by region.

- Roughly 50 percent of all organic land (certified and transitioning) is located in the West (figure 10). In western States, the majority of certified and transitioning organic land is owned and operated.
- The West has a greater proportion of land transitioning to organic production than other regions. In the West, the majority of transitioning land is owned and operated, while in the Midwest/Plains and the South the majority of transitioning land is rented. This may imply regional differences in land markets, incentives for transitioning land, and a willingness of renters to bear the transition costs.

Figure 10
Percent of total U.S. transitioning and certified organic acres by region, 2024



Note: The Midwest and Plains regions are combined to avoid disclosing data for individual operations. Owned land that is rented to others is not included in this graph. Due to rounding, the sum of the bars may not add to 100 percent.

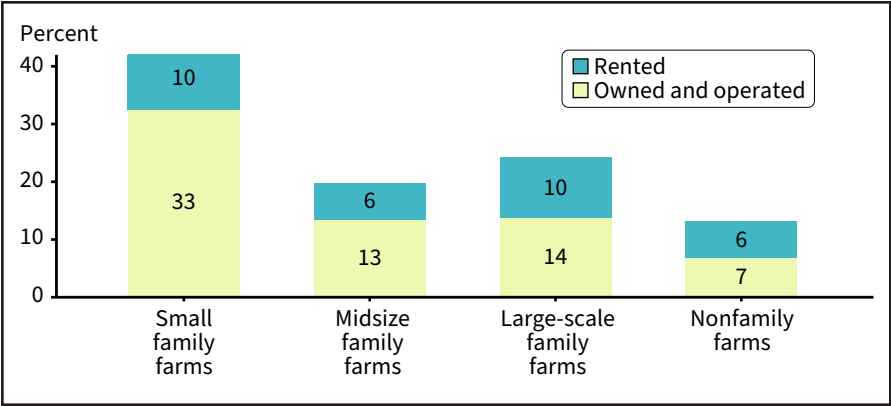
Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

The majority of organic land (certified and transitioning) is operated by family farms (figure 11).

- In 2024, more than 40 percent of total organic land was operated by small family farms. More than 75 percent of that land was owned and operated.

- Less than 15 percent of total organic land was operated by nonfamily farms.
- Midsize and large family farms fall between the other two categories in percent of total organic acreage.
- The majority of total acres for all farms are owned and operated rather than rented.

Figure 11
Percent of total organic and transitioning acres by farm type, 2024



Note: The figure combines certified organic and transitioning land for each category to avoid disclosing data for individual operations. Owned land that is rented to others is not included in this graph. Due to rounding, the sum of the bars may not add to 100 percent.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

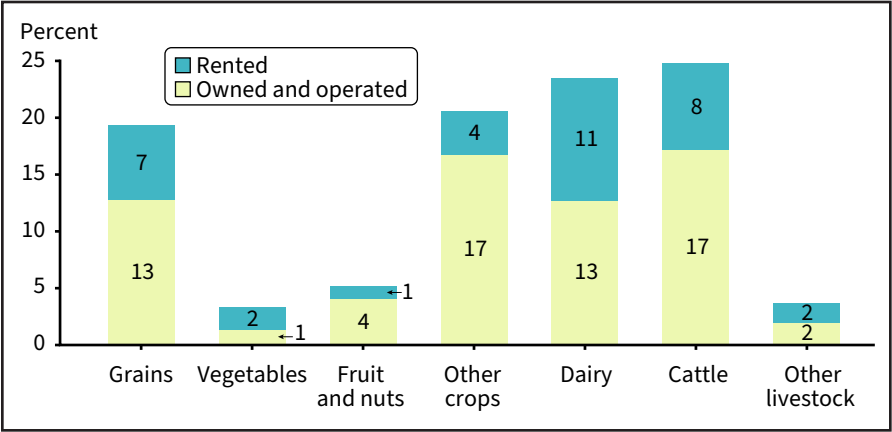
The largest proportion of transitioning and certified organic acres were on farms specializing in cattle and dairy production (figure 12).

- A combined total of more than 50 percent of total organic acres were in farms specializing in dairy, cattle, and other livestock operations, stemming from the extensive land requirements for organic livestock operations. The majority of dairy and non-dairy cattle acres were owned and operated by the producer, with dairy acres more evenly split between owned and rented land.
- Farms specializing in grains, dairy, and cattle had the largest shares of total rented acres.
- Most land in farms specializing in fruit and nut crops, which are often perennials that take time to bear a commercially viable crop,

were owned and operated. In contrast, for farms specializing in vegetable crops, which are more often annuals, two-thirds of land was rented rather than owned.

- Similarly, the majority of acreage on farms specializing in other crops, many of which also require capital investments or are perennials, were grown on owned and operated land.

Figure 12
Percent of total organic and transitioning acres by selected farm specialization, 2024



Note: The figure combines certified organic and transitioning land for each category to avoid disclosing data for individual operations. Owned land that is rented to others is not included in this graph. Other crops include tobacco, cotton, nursery and greenhouse production, Christmas trees and short rotation woody crops, hay, and sugarbeets. Other livestock includes hogs, sheep, goats, horses, poultry, aquaculture, bees, and fur-bearing animals. Due to rounding, the sum of the bars may not add to 100 percent.

Source: USDA, Economic Research Service (ERS) using USDA, National Agricultural Statistics Service and USDA, ERS, 2024 Agricultural Resource Management Survey data.

Conclusions

- **In 2024, small family farms made up most U.S. farms but a smaller share of farmland and production value.** They accounted for 86 percent of all farms, operated 40 percent of U.S. farmland, and produced 17 percent of the total value of production. Large-scale family farms represented 5 percent of farms, operated 33 percent of farmland acres, and produced 50 percent of the total value of production.

- **Large-scale family farms accounted for the majority of production value in several key commodities.** In 2024, these farms accounted for 73 percent of dairy production value, 58 percent of specialty crops, 52 percent of beef and cotton, and 51 percent of cash grains and soybeans. Small family farms produced 51 percent of hay value of production and 35 percent of poultry and eggs, while midsize family farms contributed 32 percent of hog production and 27 percent of poultry and egg production.
- **Most farms operated with a low operating profit margin (high financial vulnerability) in 2024.** Seventy-one percent of farms had an operating profit margin below 10 percent, placing them in the high financial risk category. The share of high-risk farms was highest among low-sales family farms at 82 percent while only 24 percent of very large family farms in the data were in the high-risk category.
- **Debt levels and leverage (debt-to-GCFI ratio) varied widely by farm type.** Very large family farms had the highest conditional average debt at \$3.9 million and an average debt-to-gross cash farm income (GCFI) ratio of 0.4. Small family farms had lower average debt levels but higher debt-to-GCFI ratios, including 16.9 for off-farm occupation farms and 9.3 for low-sales farms in 2024.
- **Small family farms received the largest share of Government agricultural payments in 2024.** They received 46 percent of all payments, including 73 percent of Conservation Reserve Program (CRP) payments. Large-scale family farms received 46 percent of countercyclical-type payments, which are linked to commodity programs and risk management.



- **Federal crop insurance indemnities were concentrated among midsize and large family farms.** In 2024, large family farms received 45 percent of indemnity payments and midsize family farms received 22 percent. Off-farm occupation small family farms accounted for 18 percent of participants in Federal crop insurance but received 3 percent of indemnity payments.
- **Farm household incomes were often below the national median, but wealth levels were generally above it.** In 2024, 42 percent of family farm households had incomes below the U.S. median household income, while 2 percent had wealth below the U.S. median. Off-farm income accounted for more than half of household income for 86 percent of family farm households.
- **Direct sales were led by large-scale and nonfamily farms in retail and intermediate markets, while small family farms relied more on direct-to-consumer sales.** In 2024, large-scale family farms had the highest direct sales across all marketing channels. Nonfamily farms sold \$5.6 billion to intermediate markets, and small family farms sold \$2.4 billion of edible and \$2.2 billion of non-edible products directly to consumers.
- **Organic acreage was concentrated in the West and primarily operated by family farms.** In 2024, over 40 percent of organic acreage was operated by small family farms, and about 50 percent of all organic and transitioning acreage was located in the West. Most organic acreage in the West was owned and operated. In the Midwest and Plains, a larger share of transitioning land was rented.





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