

# Potential Economic Impacts of Lifting the Canola Ban in the Willamette Valley on Brassica Seed Producers

## Economic Assessment Summary

A new study by the non-partisan Oregon firm Highland Economics, measures the economic impact of dismantling the Willamette Valley Protected District on the valley's vibrant specialty vegetable seed sector, in particular its brassica seed industry. The Valley is one of the last regions on earth suitable for large-scale brassica seed production and grows over 90% of the world's supply of many brassica seed varieties. The study assesses the effects of allowing unrestricted rapeseed/canola growing in the Protected District, a change proposed by a small number of rapeseed/canola farmers.

**Background:** The Willamette Valley Protected District is one of four protected districts in Oregon, which are collaborative designations to limit rapeseed/canola in places where high-value specialty seeds are grown. This session, Oregon's elected officials are considering legislation that would make the Willamette protections permanent, SB789.

The economic assessment was commissioned by Oregon Seed Alliance and Oregon Organic Coalition to provide updated economic data to the Oregon legislature. The study was reviewed by specialty seed farmers and canola farmers alike.



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## Key Findings:

- The Willamette Valley is one of the vegetable seed capitals of the world, a climatically unique region for growing high-value vegetable seeds, particularly brassica seed, and an economic powerhouse for Oregon.
- Brassica seed production, the seed most at risk from rapeseed/canola, produces average profits of \$1400 per acre for conventional, and \$32,000 per acre for organically grown seed. In contrast, rapeseed/canola produces profits of only \$190 per acre.
- If, as is likely, rapeseed/canola were to eliminate brassica seed growing (setting aside the impacts to seed producers' investments and other crops) a loss of approximately \$15M in production value, and \$9.2M in direct and indirect labor income, would ensue. These figures do not include additional substantial losses from the Valley-based seed processing companies.
- To replace the jobs and labor income associated with brassica seed production alone there would need to be roughly 36,000 and 26,000 acres of canola produced in the Willamette Valley, respectively.
- This is two to three times the highest level of harvested canola acreage for the entire state of Oregon (2013) and four to six times the average annual harvested canola acreage for the state over the last ten years of data available (the most recent data available on canola acreage in Oregon is 2009-2018).
- Other oilseed crops such as flax, sunflower, safflower, yellow mustard and camelina do not threaten specialty seed crops to the degree that canola does, and can be grown in the protected districts.

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