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FEWER FARMS, BIGGER STAKES

How agriculture is transforming
in the Charlotte region

Kailas Venkitasubramanian, Ph.D.

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Fewer farms, bigger stakes

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The transformation in miniature

Between 2017 and 2022, the 14-county Charlotte region lost **760** farms — roughly one in every 13. In a region that stretches from Catawba County in the foothills west of Charlotte to Lancaster County in the South Carolina sandhills, that loss amounts to a structural shift in who farms, how much land they work and whether the next generation will follow suit.

Some **8,936** farms were still in operation in 2022. Revenue per surviving operation rose in every county the Census reports but what sustains the activity — accessible land, economic safety nets and an incoming generation of farmers — is deteriorating faster than current policy is responding.

What sets this region apart is the economic pressure of one of the South's fastest-growing metros. That pressure has three specific components. **Population growth** pushes housing demand outward faster than the region adds homes within it. **Farmland near Charlotte is priced by what a developer would pay for it** rather than by what a crop returns on it. And **the region builds at densities low enough that each new household consumes an outsized number of acres**. Farmland here is not just declining in use — it is being permanently converted to low-density residential development at an accelerating rate (American Farmland Trust 2023a).

Two terms used throughout

Farms, not farmers. The Census of Agriculture counts *operations*, not people. A single farm may be worked by several *producers* — the term USDA uses for anyone involved in running it — and one producer may be involved in more than one farm. So “8,936 farms” is a count of businesses; the producer counts and producer ages later in this article describe the people, and the two move independently.

Peri-urban. The band of land at a metro's edge that is still farmed but already priced, taxed and zoned as land in waiting. Peri-urban farms tend to be smaller and more fragmented than rural ones, more likely to sell directly to consumers, and more exposed to development pressure than to commodity markets. Most of the Charlotte region's farmland is peri-urban in this sense.

Following a national script

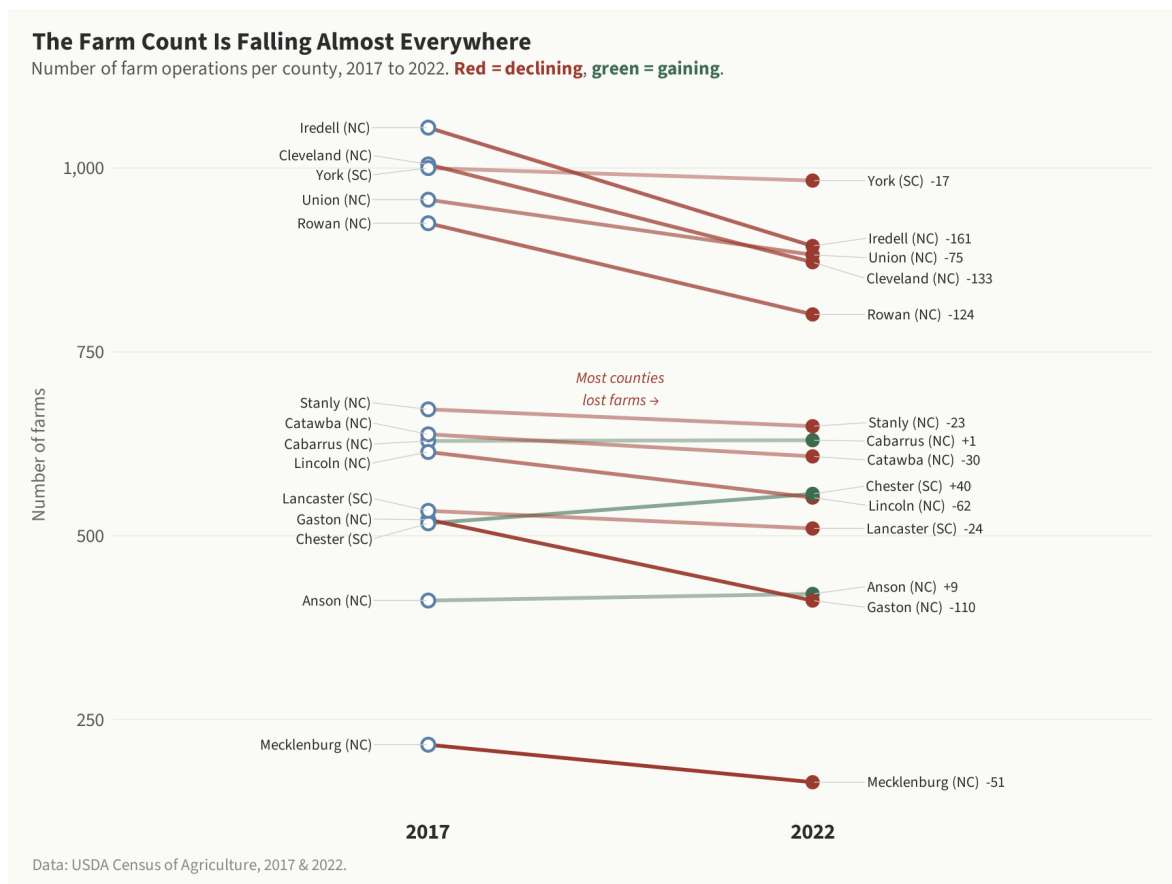
The Charlotte region's farm losses mirror a pattern the USDA Economic Research Service has tracked since the mid-1980s: fewer operations each census, with surviving farms

growing larger and more commercially concentrated. By 2015, just over half of all U.S. farm production by value came from operations with at least \$1 million in annual sales, up from 31 percent in 1991. The midpoint of cropland acreage — the size above which half of U.S. cropland sits — nearly doubled between 1987 and 2012, from 650 to 1,201 acres (MacDonald et al. 2018). That consolidation has not reversed (U.S. Department of Agriculture 2025).

North Carolina and South Carolina fit the mold. North Carolina lost 7.8 percent of its farms between the two censuses; South Carolina lost 8.7 percent. Average farm sizes inched upward in both states, and average sales per farm jumped sharply (USDA National Agricultural Statistics Service 2024a).

! **760** farms disappeared from the 14-county Charlotte region between 2017 and 2022 — a decline of **7.8%**.

The slope chart below maps that decline county by county. Almost every county lost operations, but the pace varied widely.



County-level farm count changes, 2017 to 2022. Chester (SC) and Anson (NC) recorded the only meaningful net gains; Cabarrus added a single farm.

Mecklenburg County — home to Charlotte — lost 51 farms, from 216 to 165. Land and buildings averaged **\$1,265K** per farm there in 2022 — second only to Union County in the region and nearly double Gaston's value. Few can afford to farm against those prices.

The heaviest losses fell on counties where agriculture still anchors the economy: **Cleveland** (-13.2%), **Gaston** (-21.1%), and **Iredell** (-15.3%) each shed more than 13 percent of their farms. These are not losses driven by urban encroachment alone — they reflect consolidation pressure.

Three counties avoided net losses, though only two by a meaningful margin (Cabarrus added a single farm). **Chester County, SC** added the most. That pattern is consistent with estate subdivision and small direct-market growth documented elsewhere in the peri-urban Southeast (American Farmland Trust 2023b), though Census data alone cannot confirm the mechanism here. **Anson County, NC** tells a different story: its small net gain hides one of the most commercial farm economies in the region, driven by contract poultry production and large-scale row-crop operations.

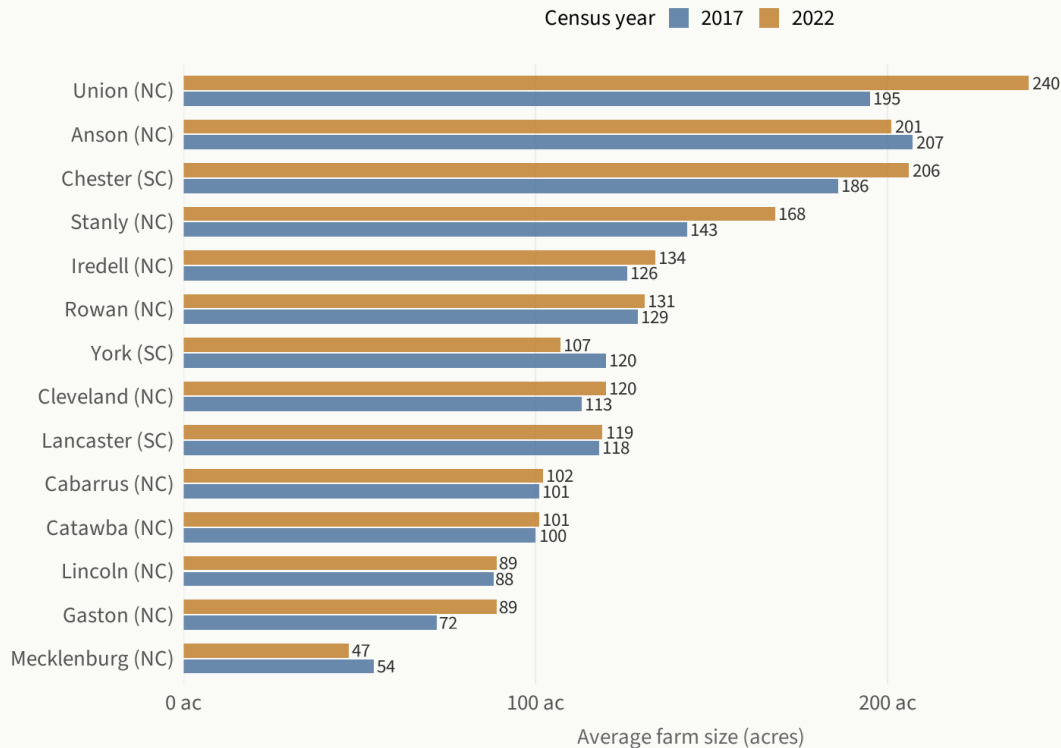
The shape of consolidation

The farms that remain are getting bigger. **Union County** now has the largest average farm in the region at 240 acres — up from 195 in 2017, a 23 percent jump as mid-sized operations exited and larger ones absorbed their land. **Anson** held steady at around 201 acres, while **Chester (SC)** climbed from 186 to 206.

At the small end, Mecklenburg's average farm covers just 47 acres, and Gaston's 89. The region's median farm size of 120 acres sits well below the North Carolina state average of 190 acres and South Carolina's 201 — a reflection of the fragmented land patterns typical of peri-urban agriculture (USDA National Agricultural Statistics Service 2024a).

Average Farm Size Varies Widely — Union Leads the Region

Average size of farm operations in acres, 2017 and 2022.



Data: USDA Census of Agriculture, 2017 & 2022.

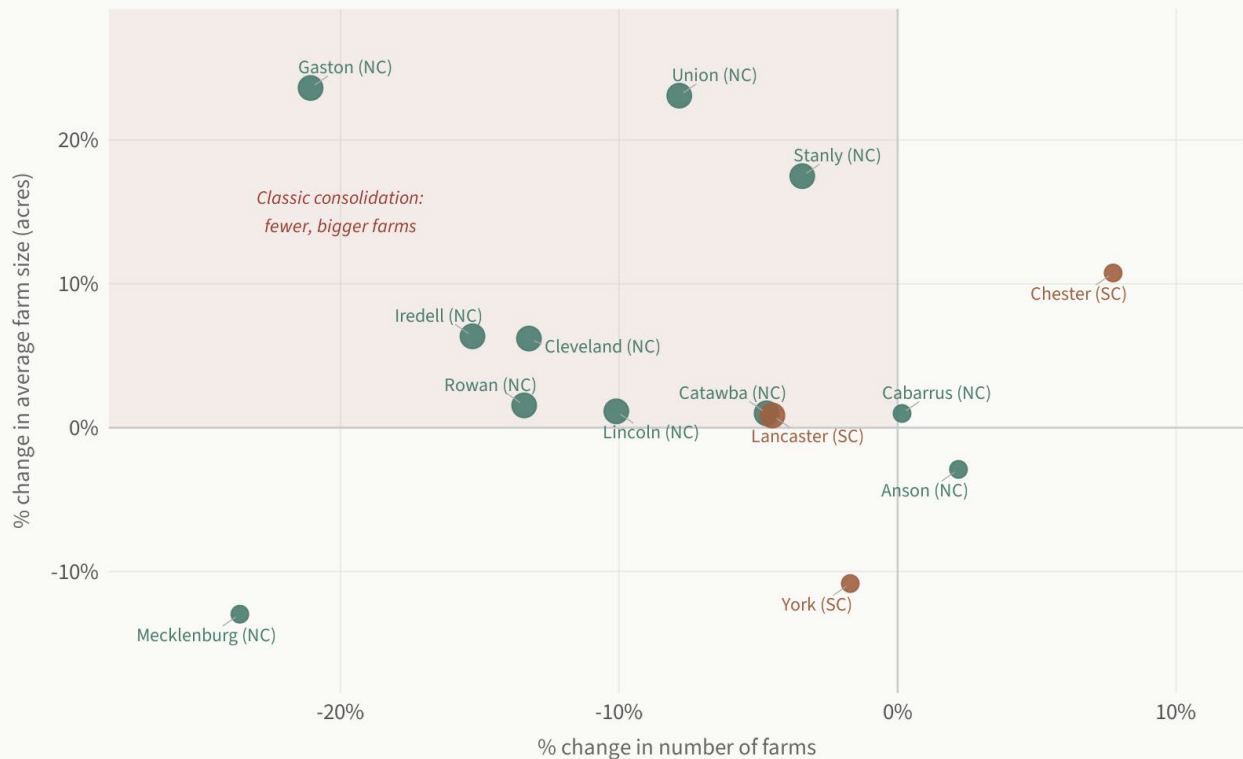
Union and Anson operate at scales two to four times larger than the most urbanized counties; the gap widened between censuses.

The pattern sharpens when farm count change is plotted against farm size change for each county. Most counties cluster in the upper-left quadrant — fewer farms, larger operations — the textbook signature of agricultural consolidation. **Gaston** and **Union** show the pattern most dramatically: both lost farms while average acreage grew by more than 23 percent. **Mecklenburg** and **York (SC)** sit in the opposite corner, losing farms *and* shrinking in average size — a sign that mid-sized commercial operations are exiting while small hobby farms persist. **Chester (SC)** stands alone in the growth quadrant: more farms *and* larger farms.

Farms Are Getting Fewer and Bigger — Classic Agricultural Consolidation

Each county's % change in farm count (x-axis) vs. % change in average farm size (y-axis), 2017–2022.

Shaded quadrant = consolidating counties (fewer farms, larger size). **Teal** = NC, **brown** = SC.



Data: USDA Census of Agriculture, 2017 & 2022.

Each dot is a county, positioned by its percent change in farm count (x-axis) and average farm size (y-axis). The shaded quadrant marks classic consolidation: fewer, bigger.

That combination looks like expansion, and it is worth pausing on, because Chester is often grouped with Anson as one of the region's working agricultural counties. The rest of Chester's numbers point the other way. Its average sales per farm — **\$68K** — are the second-lowest of the 13 counties USDA reports, against a regional median of \$150K. Only 3.4 percent of its farms sell \$250,000 or more a year, the second-smallest commercial tier in the region, while 69 percent sell less than \$10,000. Its average production expenses per farm, \$50K, are the lowest of any county here — these are not capital-intensive operations. And 43 percent of Chester's farm acreage is pasture, the highest share in the region, against 14 percent in harvested cropland, the lowest.

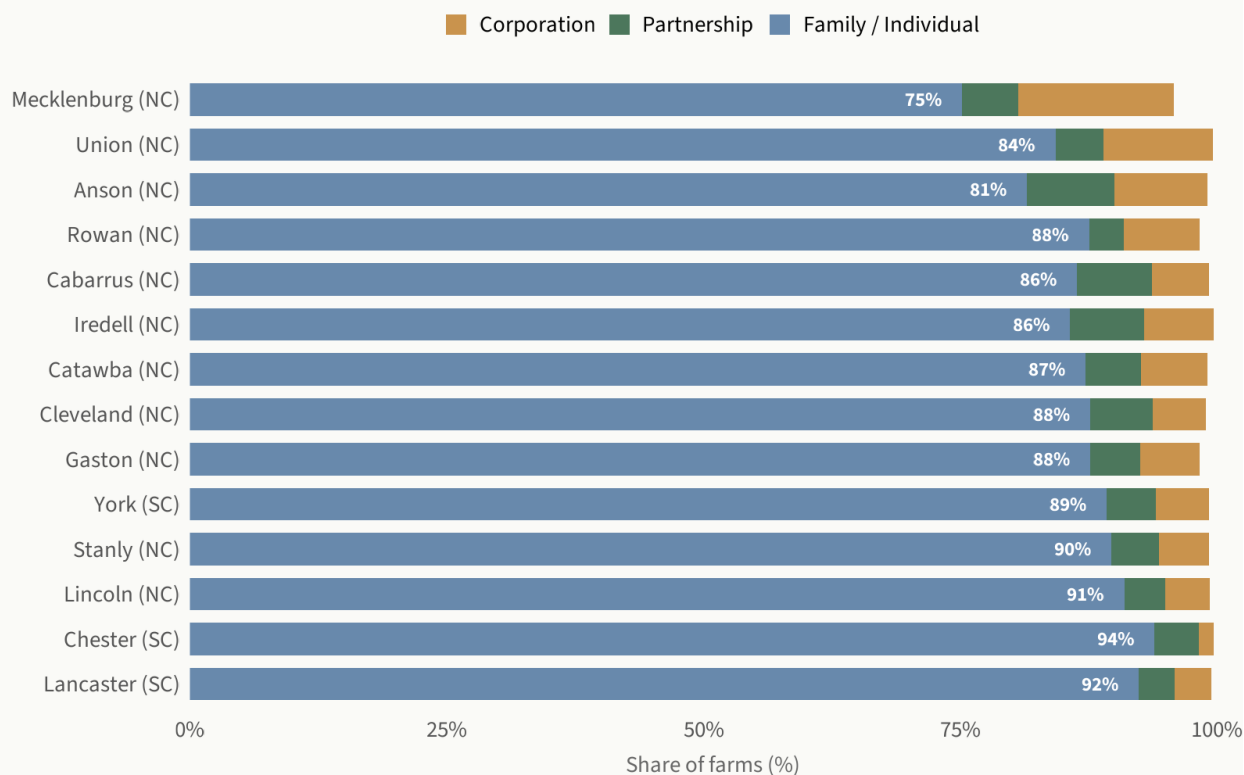
The 40 farms Chester added, in other words, are large, lightly capitalized grazing and hay operations on inexpensive land — not commercial expansion. On the measures that matter for farm income, Chester is closer to Anson's mirror image than to a smaller version of it: Anson concentrates enormous gross revenue in 421 operations, while Chester spreads very little across 557. Both counties struggle economically, but agriculture is doing something different in each.

Ownership form is shifting, too

Consolidation has a legal dimension. Family-owned and individually operated farms still dominate — in Chester (SC), Lancaster (SC), and Lincoln (NC), more than 90 percent of operations are organized that way — but the corporate share varies widely. **Mecklenburg** has the highest corporate share at 15% of operations, **Union** has climbed to 11%, and the regional median sits at about 6%. Statewide, 8.9 percent of North Carolina’s farms and 6.3 percent of South Carolina’s are organized as corporations (USDA National Agricultural Statistics Service 2024a).

Family Farms Dominate, But Corporate Share Varies

Percent of farms by legal organization type, 2022.



Data: USDA Census of Agriculture, 2017 & 2022.

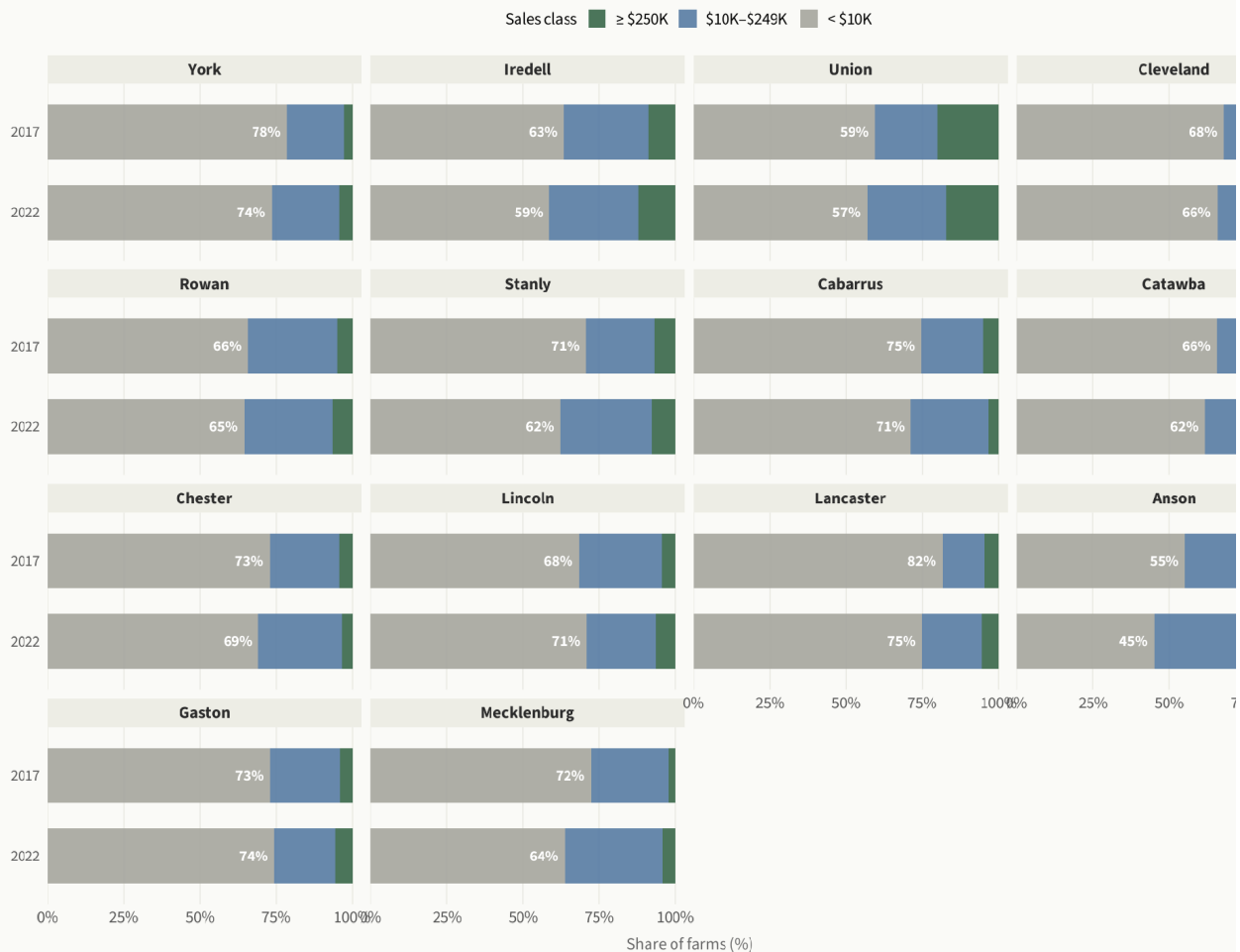
Corporate and partnership shares vary widely. Mecklenburg and Union stand out; most counties remain dominated by individual and family operations.

Many farm “corporations” are family operations that incorporated for tax or liability purposes — the label does not necessarily mean outside ownership. But the distinction matters for succession. Corporate structures can ease intergenerational transfer through stock sales or board changes. They can also, in principle, make it simpler for outside investors to acquire farmland as a financial asset — a trend documented nationally though not directly measured in the Census.

What the sales classes show

Small Farms Dominate but Commercial-Scale Farms Are Growing

Share of farms by annual sales class, 2017 and 2022. Each panel is one county.



Data: USDA Census of Agriculture, 2017 & 2022.

Sales class distributions shifted between censuses. In Anson, the share of farms with \$250K+ in annual sales grew; in Mecklenburg, the smallest operations became more dominant.

The sales-class data make the pattern concrete. In Anson County, farms with annual sales above \$250,000 grew from about 45 to 55 percent of all operations between censuses — more than half the county’s farms now operate at a commercial scale. In Mecklenburg, the opposite happened: the share of farms earning less than \$10,000 grew, reflecting the exit of mid-range operations and the persistence of small hobby farms.

Consolidation is not inherently a crisis. Larger, more efficient operations can sustain regional food production and weather market volatility better than smaller farms on thin margins. But consolidation tightens land access, thins community structure, and raises the entry cost for the next generation (MacDonald et al. 2018). Those risks are amplified in a region where land conversion — not just consolidation — is removing agricultural capacity permanently.

The land beneath Charlotte’s farms

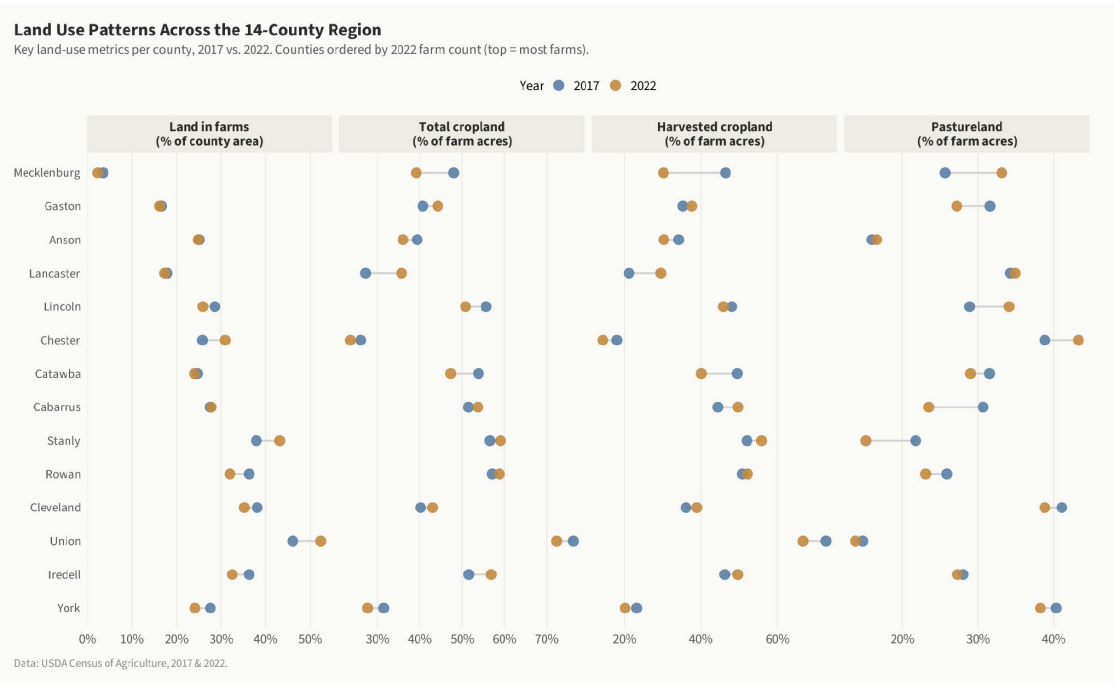
North Carolina is projected to lose 1.2 million acres of farmland to development by 2040 — second in the nation only to Texas (American Farmland Trust 2023a). Between 2001 and 2016 alone, the state lost 732,000 acres to development or compromise, 387,000 of which were rated “nationally significant,” meaning best suited for food and crop production.

Land that is **developed** has been built on outright. Land that is **compromised** has been carved into low-density residential parcels: it stays nominally rural, and may even still be mowed for hay, but it is now too fragmented and too closely surrounded by houses to farm at a commercial scale. American Farmland Trust counts both because both are effectively permanent. Compromised land almost never returns to production — once a field is subdivided among a dozen homeowners, no one can reassemble it.

The Charlotte region sits at the center. Two of the 14 study counties appear in the national top 50 for projected farmland loss: **Union County ranks 23rd** and **Iredell County ranks 38th** (American Farmland Trust 2023a). At the state level, land in farms declined 3.6 percent in North Carolina (from 8.4 million to 8.1 million acres) and 4.0 percent in South Carolina (from 4.7 million to 4.6 million acres) between 2017 and 2022 (USDA National Agricultural Statistics Service 2024a).

How the land is used

Start with what the region has — the 14 counties do not farm the same way, and their land use profiles reveal how different their agricultural economies are.



Four dimensions of land use across the 14 counties: share of county in farms, total cropland, harvested cropland, and pastureland. Western counties lean pastoral; eastern counties lean row-crop.

York (SC) and **Iredell** devote the highest share of county area to farming — upward of 40 percent — while **Mecklenburg** and **Gaston** sit below 10 percent, a measure of how far urbanization has transformed them.

The crop-pasture split varies just as widely. **Anson** and **Union** are row-crop counties: more than half their farm acres are cropland, much of it harvested. **Cleveland**, **Catawba**, and **Gaston** lean toward pasture, reflecting a livestock and hay economy that looks nothing like the commodity-crop operations to the east.

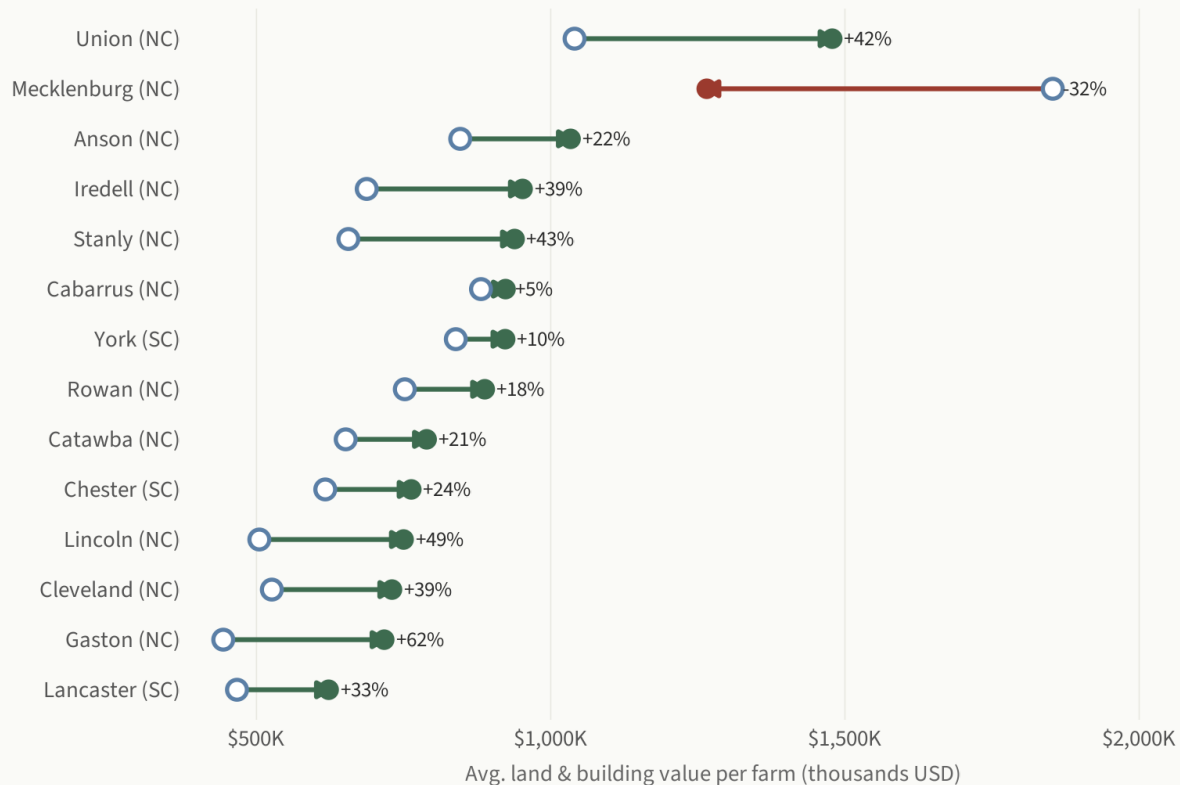
These distinctions matter because they determine what is at stake when farmland is converted. Losing pastureland in Cleveland is a different economic and ecological loss than losing harvested cropland in Union. Economically, cropland is the higher-earning land per acre — Union’s harvested cropland returned \$887 an acre in crop sales in 2022, against \$571 in Cleveland — and it is cropland that carries the “nationally significant” soil ratings, because those soils cannot be relocated. Ecologically the ranking can invert. Pasture and hayland hold continuous ground cover, so acre for acre they do more of the erosion-control, water-quality, habitat and soil-carbon work in a farmed landscape than tilled row crops do (Swinton et al. 2007). Pasture is also the cheapest way into farming, which means losing it raises the entry barrier for exactly the small and beginning operations the region has fewest of.

The price of land

The median value of land and buildings per farm rose by more than **29%** across the region between censuses — in every county but Mecklenburg, where it fell as the county’s farm base contracted. North Carolina’s average climbed 23 percent to \$1,040,748; South Carolina’s rose 28 percent to \$876,265 (USDA National Agricultural Statistics Service 2024a).

Farm Land Values Rose Sharply Across All Counties

Estimated market value of land & buildings, average per farm operation, 2017 vs. 2022. Label shows % change.



Data: USDA Census of Agriculture, 2017 & 2022.

Land and building values per farm rose in every county except Mecklenburg, widening the capital barrier for prospective new farmers.

Rising land values benefit owners who sell or exit farming, but they shut out the new farmers who might otherwise take over. When farmland trades at the prices it now commands in the counties closest to Charlotte, farming becomes viable only for those who already own land or can access it through inheritance or long-term lease.

Low-density residential sprawl drives most of it: 78 percent of all agricultural land lost or compromised in North Carolina goes to sprawl, which is five times more likely than other land uses to trigger permanent removal from agricultural use (American Farmland Trust 2023a). Zoning ordinances, density standards, and subdivision regulations are as relevant to farmland protection as dedicated conservation programs, but few counties in North Carolina have adopted them at the scale needed to slow conversion.

Density decisions are farmland decisions

The region holds its zoning arguments in two separate rooms. In Charlotte and the inner suburbs, the question is whether to allow more homes on a given block — an accessory unit, a fourplex, a mid-rise along a transit corridor — and it is argued as a neighborhood matter. Thirty miles out, in Union or Iredell or Cleveland, the question is whether to

approve another subdivision on a field that grew soybeans last season, and it is argued as a rural matter. They are two halves of the same argument.

Housing demand in a metro growing this fast does not evaporate when a neighborhood declines to absorb it. It relocates to wherever land is cheapest and approval is easiest, which is farmland at the edge. And because low-density development consumes several times the acreage per household that compact development does, the acres spent at the edge rise as the density permitted at the core falls — the basic mechanism behind decades of research on development at the urban fringe (Heimlich and Anderson 2001; Brueckner 2000). It is also the arithmetic behind the finding that 78 percent of North Carolina's farmland loss goes to low-density sprawl rather than to cities. A resident opposing a duplex two blocks away is, without intending to be, a participant in a land-use decision being made in Union County.

This is what it means to treat the Charlotte region as one place rather than fourteen jurisdictions. Farmland is not a rural amenity that city residents drive out to visit on weekends. It is the far end of a single regional land market that everyone here is bidding in, whether or not they know it.

One region, three pictures

Even as farm counts fell and land values rose, the region's agricultural footprint did not shrink uniformly. It reorganized — and which county looks strongest depends on which metric is used.

The Region's Farming Hierarchy Reshuffles by Metric

County rankings (2022) by farm count, average sales, and land value. **NC counties** and **SC counties**.



Data: USDA Census of Agriculture, 2017 & 2022.

Each line traces one county across three metrics. A county that ranks low on farm count may rank high on sales or land value — or vice versa.

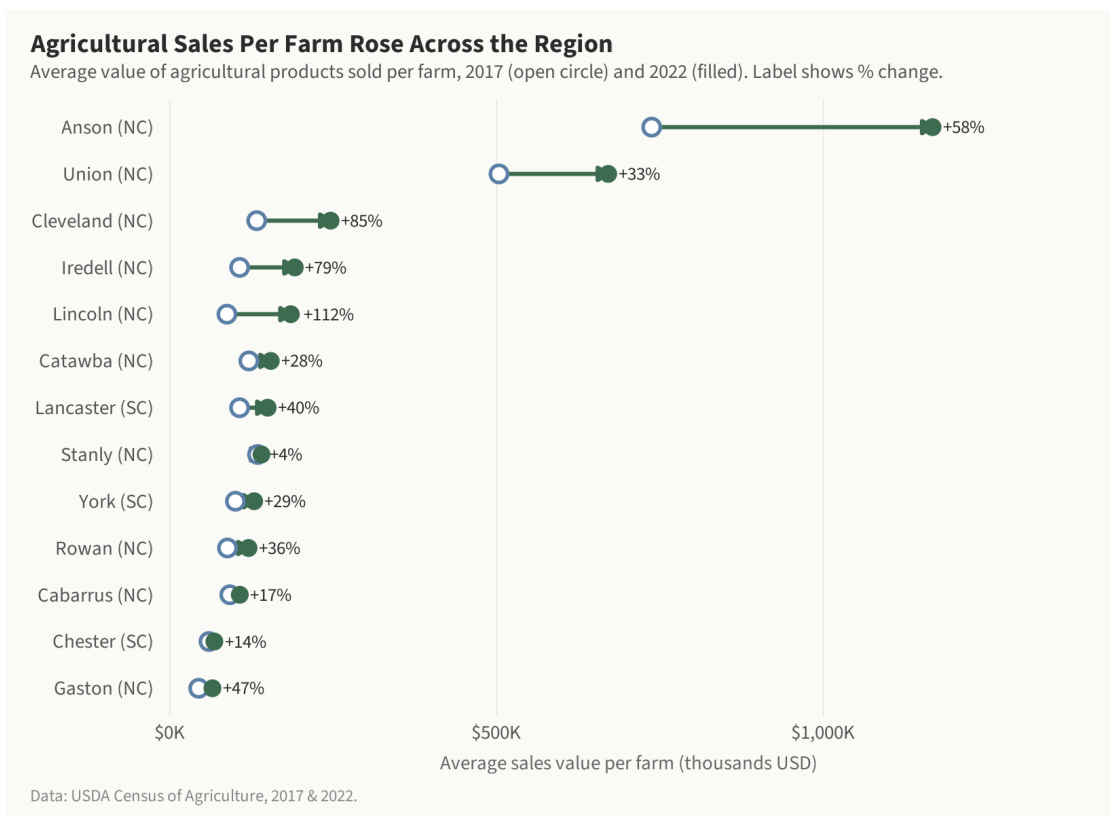
Anson County ranks 12th in farm count but first in average sales per farm. **Mecklenburg** ranks last in farm count but second-highest in land value per farm — a reflection of its suburban land market, not its agricultural productivity. A county that looks marginal by one measure may carry weight another misses.

Revenue up, safety nets down

Where the revenue came from

The farms that survived between 2017 and 2022 earn more on average. Average sales per farm rose in all 13 counties USDA reports for both years, with **Lincoln** (+112%), **Cleveland**

(+85%), and **Iredell** (+79%) recording the largest proportional gains. These gains parallel statewide trends: North Carolina's average sales per farm rose 57 percent, to \$436,569, and South Carolina's rose 61 percent, to \$195,608 (USDA National Agricultural Statistics Service 2024a).



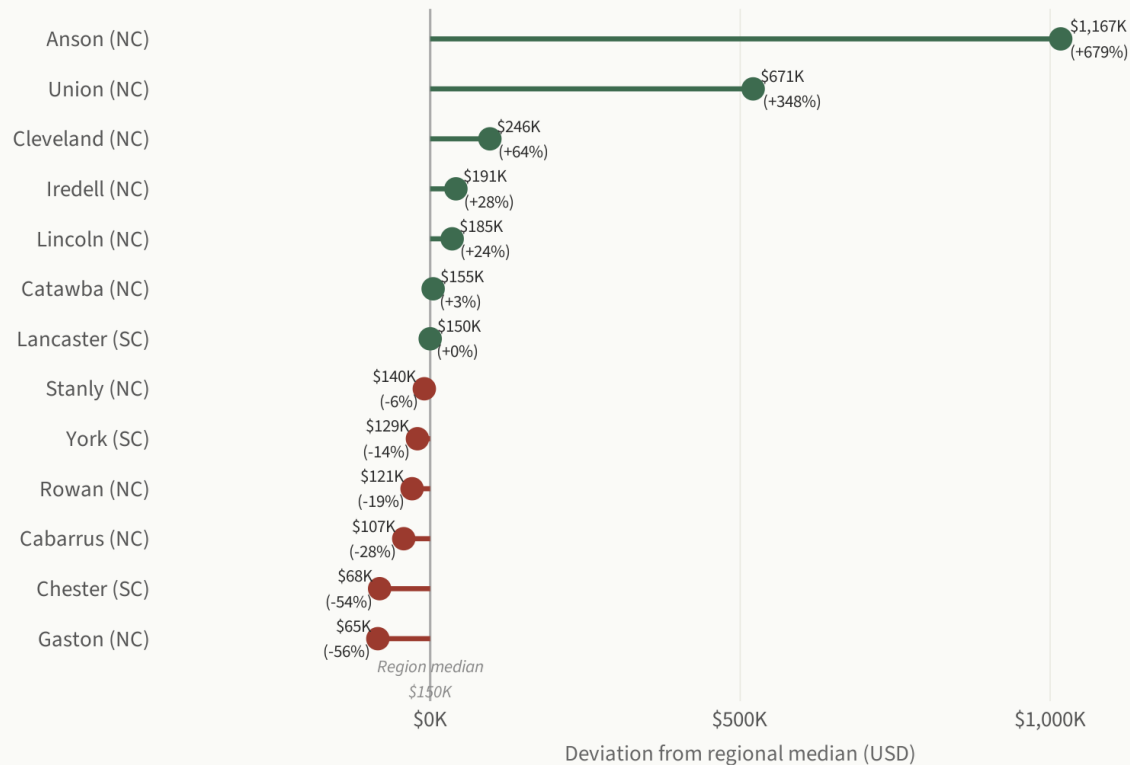
Lincoln and Cleveland led the regional gains in per-farm revenue; Anson stands apart as a commercial outlier driven by contract poultry.

Anson County remains in a category by itself: average sales per farm of **\$1,167K** in 2022, nearly 8 times the regional median of **\$150K**. That premium reflects the dominance of contract poultry production — a system in which integrators supply chicks, feed, and technical assistance while contract growers provide land, housing, and labor. Contract arrangements generate high gross revenues but push most financial and operational risk onto growers, who typically carry substantial debt on poultry house infrastructure (MacDonald 2014).

That makes Anson's first-place ranking a poor guide to how its farm households actually fare. Gross contract revenue passes through the operation; what remains after feed, utilities, and debt service on poultry housing is a much smaller and far more volatile number. Anson leads the region in agricultural revenue per farm — whether that revenue reaches the households doing the work is a question the Census of Agriculture cannot answer, and one worth taking up with income and wealth data rather than farm data.

A Few Counties Drive Outsized Agricultural Revenue

Average value of agricultural products sold per farm (2022), relative to the 13-county median.



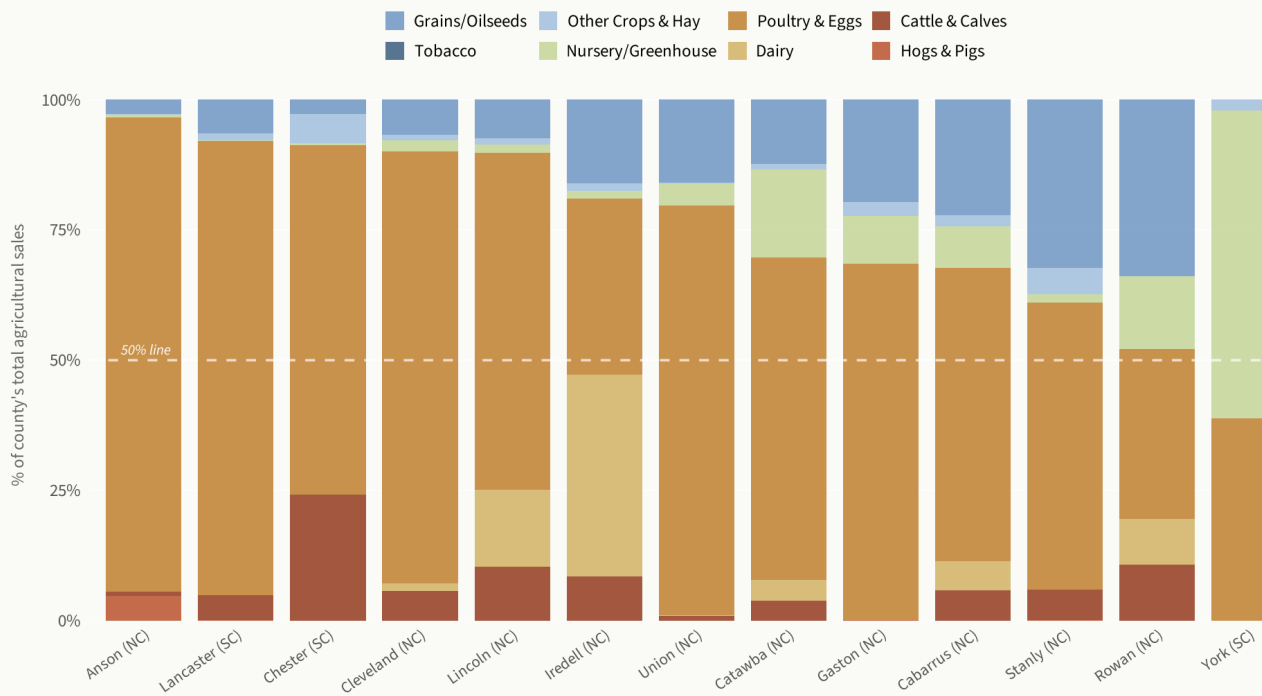
Data: USDA Census of Agriculture, 2017 & 2022. Mecklenburg is omitted: USDA withheld its value to protect the confidentiality of a small number of operations.

The gap between Anson/Union and the rest of the region is stark. Most counties cluster at or below the regional median. Mecklenburg is omitted: USDA withheld its value to protect the confidentiality of a small number of operations.

Mecklenburg does not appear in that chart, or in the commodity-mix and expense charts that follow. With only 165 farms, its sales and expense detail falls below USDA's disclosure threshold and is withheld to protect individual operations. The absence is a limitation of the data, not a finding: Mecklenburg has farm revenue like everywhere else. The irony is that suppression bites hardest in exactly the county where the region's urban-agricultural collision is most advanced.

Livestock Dominates Sales in Most Counties — Crops Gain Ground in a Few

Share of total agricultural sales value by commodity type, 2022. Counties ordered by livestock share (highest left).



Data: USDA Census of Agriculture, 2017 & 2022. Mecklenburg is omitted: USDA withheld its commodity detail to protect the confidentiality of a small number of operations.

Poultry dominates the revenue mix in most counties. York and Rowan are the region's clearest crop-oriented exceptions. Statewide, North Carolina derives 75 percent of agricultural sales from livestock and poultry.

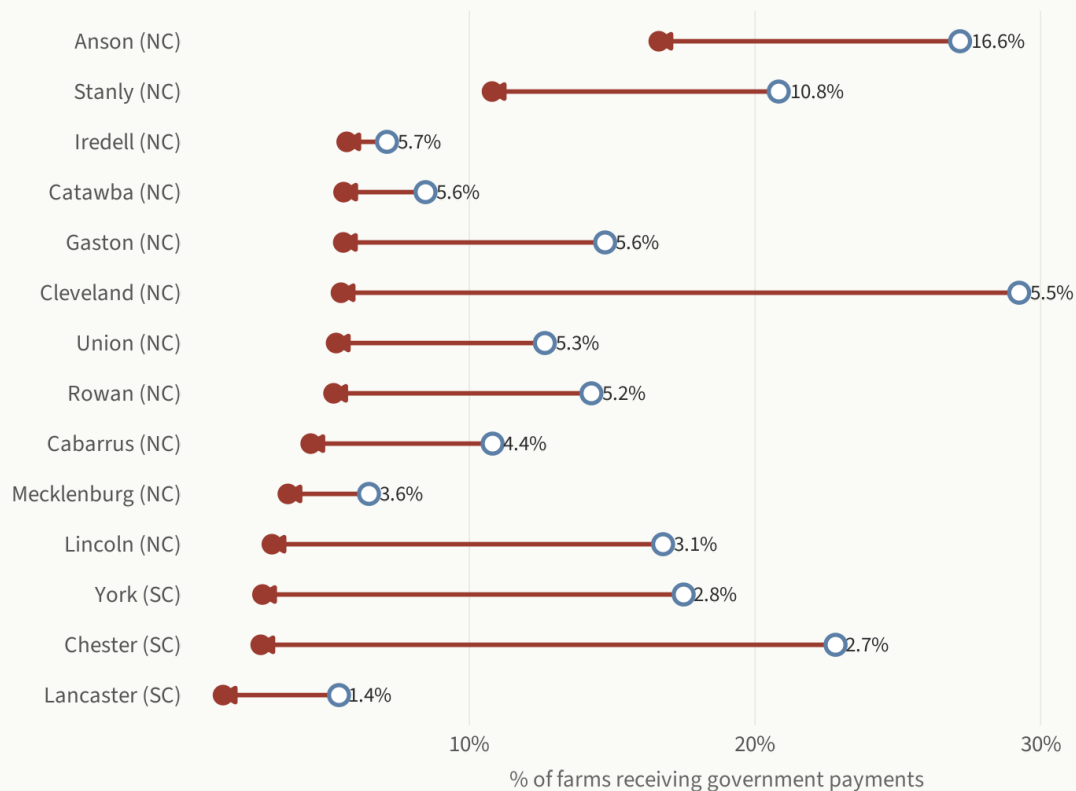
Beneath the headline revenue numbers, the farm income picture is fragile. Nationally, 77 percent of farm household income came from off-farm sources in 2023, and roughly half of all farm households operated at negative farm income (USDA Economic Research Service 2024a). Off-farm wages — not farm revenues — are what keep most farm households solvent.

The disappearing safety net

Running directly against the revenue gains: the share of farms receiving federal agricultural program payments fell in every county — by 24 percentage points in Cleveland, 20 in Chester (SC) and 15 in York (SC).

Government Payment Participation Shifted Across Counties

Percent of farms receiving government payments, 2017 (open) and 2022 (filled).



Data: USDA Census of Agriculture, 2017 & 2022.

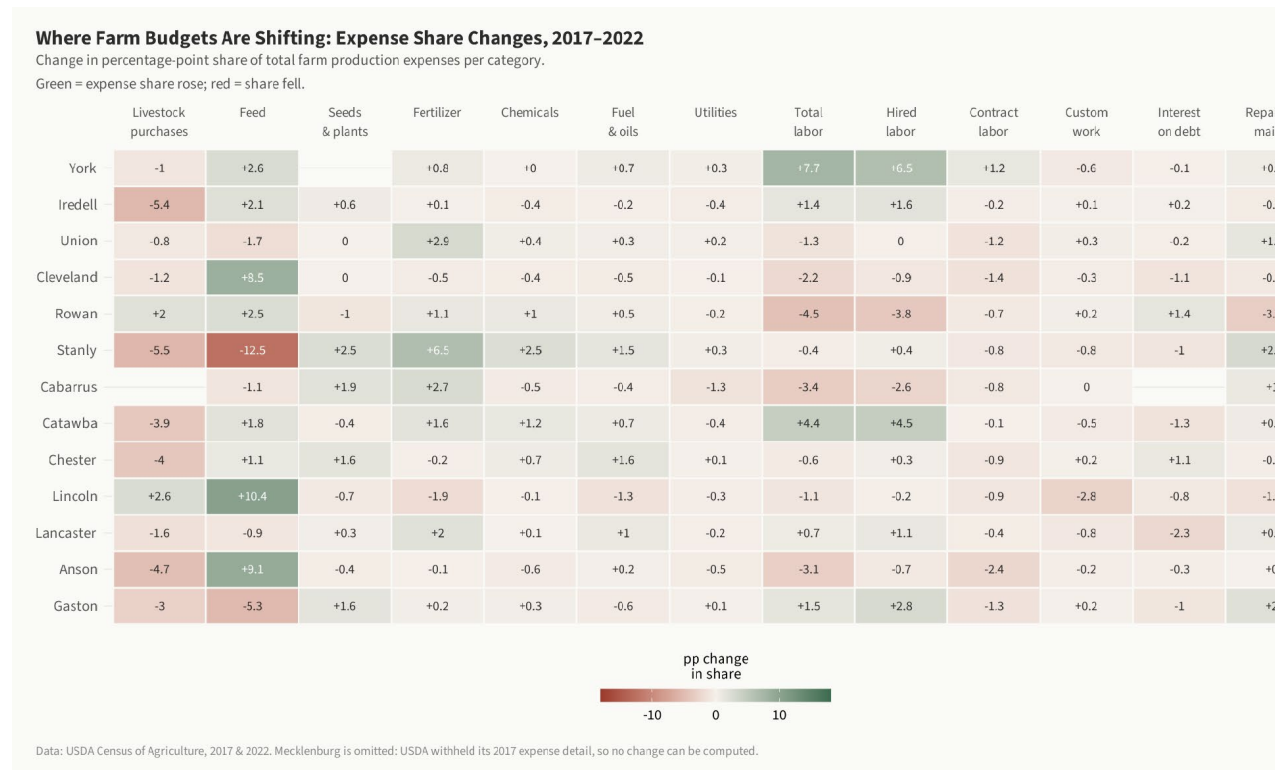
The decline was universal — every county saw fewer farms receiving government payments between 2017 and 2022.

Two forces drove the drop, and neither of them are farmers choosing to opt out. The primary federal safety-net programs — Agriculture Risk Coverage (ARC) and Price Loss Coverage (PLC) — made fewer disbursements in 2022 because commodity prices were historically high, reducing the gaps that trigger payments (USDA Economic Research Service 2024b). These programs pay out only when prices or revenues fall below a benchmark. In a high-price year they simply do not trigger; a farm enrolled in ARC or PLC that received nothing in 2022 was still enrolled.

But the decline is not just a market-cycle story. Nationally, only 40 percent of farms grow commodities eligible for ARC or PLC coverage. Most small and diversified operations grow commodities the programs do not cover, and have never qualified for them (USDA National Agricultural Statistics Service 2024a). What the 2022 figures record, then, is a change in what the programs paid out and in whom they were built to cover — not a change in what farmers sought. The exposure is structural: for most of the region's farms, there is no federal safety net to participate in.

The expense squeeze

The expense side reinforces this exposure. Average total production expenses per farm rose in every county but Chester (SC), and steeply in several: Lincoln (+93%), Cleveland (+82%) and Iredell (+71%). Feed absorbed much of that increase, growing as a share of farm budgets in 8 of the 13 counties USDA reports — driven by input price inflation and the dominance of livestock production.



The heatmap shows how each expense category shifted as a share of total farm costs between 2017 and 2022. Green cells mark rising shares; red cells mark declines. Mecklenburg is omitted: USDA withheld its 2017 expense detail, so no change can be computed.

The pattern is uneven. Feed's share of the budget climbed most sharply in Lincoln (+10.4 points), Anson (+9.1) and Cleveland (+8.5) — livestock- and poultry-heavy counties where feed was already the largest line item. It fell where herd sizes or product mixes shifted, most dramatically in Stanly (-12.5 points). Labor moved the other way in most counties, and not because farm wages fell: labor's *share* of the budget shrank because feed and fertilizer grew faster. York (SC) (+7.7 points) and Catawba (+4.4) are the notable exceptions. Fertilizer and chemicals likewise declined in relative terms in several counties, not because spending on them dropped but because other categories rose faster. The net effect: a cost structure shifted toward inputs farmers have little control over, leaving thinner margins when prices normalize.

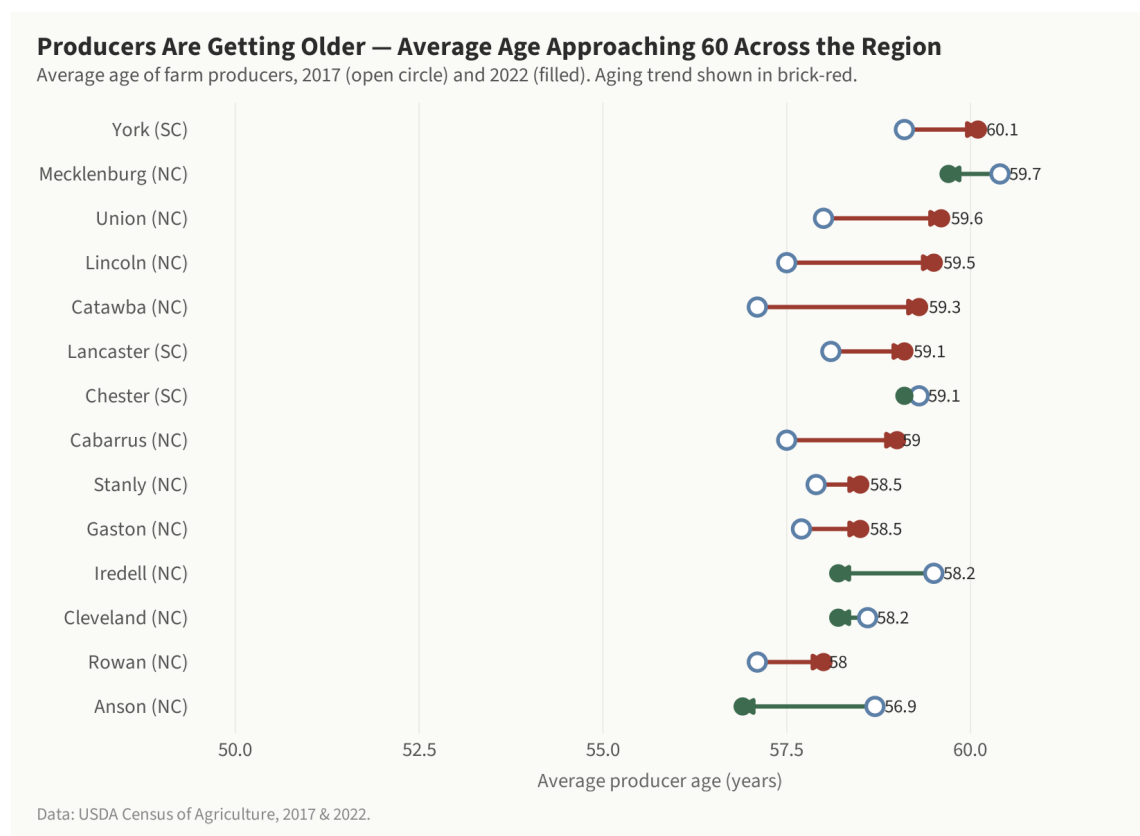
Who will farm in the next generation?

The 2022 Census of Agriculture found the average age of all U.S. farm producers was 58.1 years — a record, up from 57.5 in 2017 (USDA National Agricultural Statistics Service 2024a). The number of producers between ages 35 and 64 declined by 9 percent between censuses; the number 65 and older increased by 12 percent. Over one-third of all U.S. farm producers are now older than 65.

The 2022 Census recorded an 11 percent increase in beginning farmers (those with 10 or fewer years of experience), but that growth has not come close to replacing exiting operators (USDA National Agricultural Statistics Service 2024c).

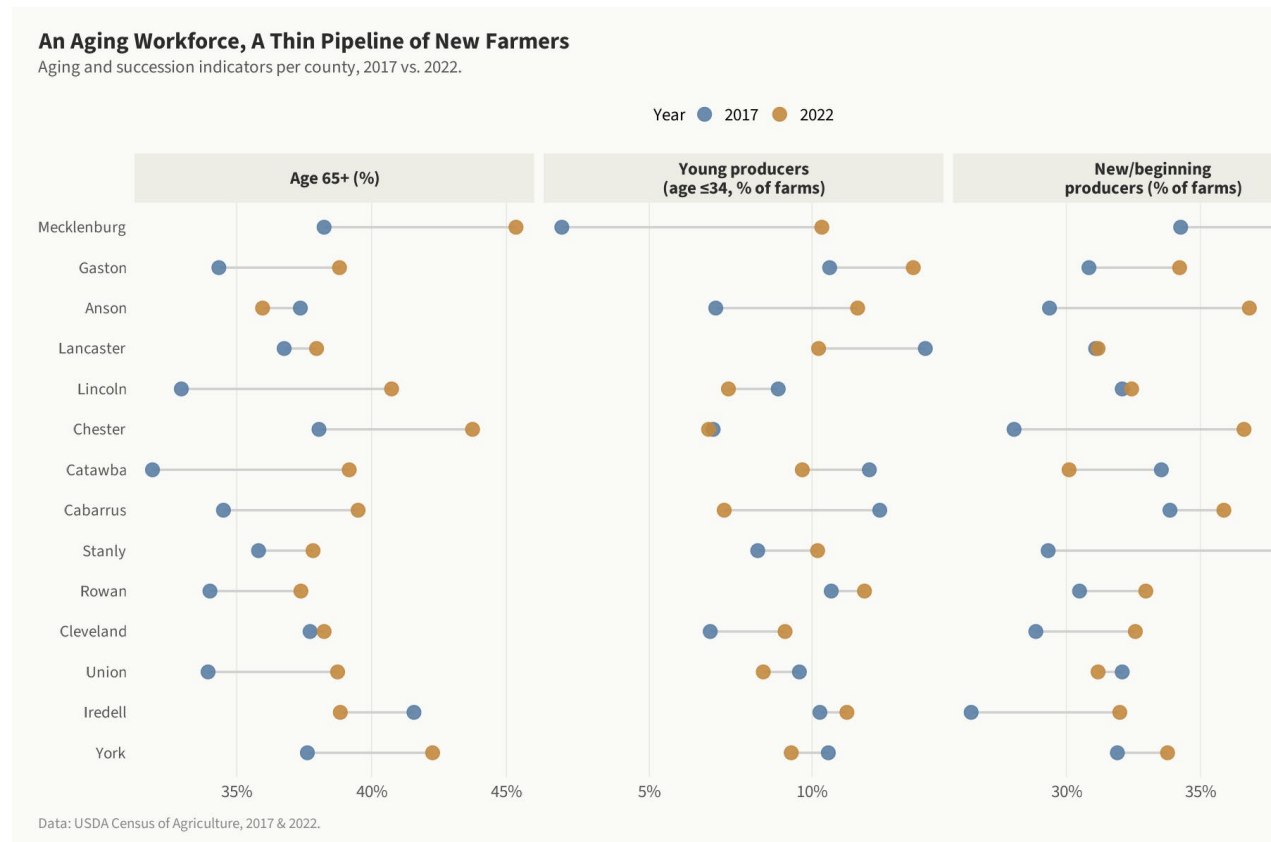
An aging workforce without a succession plan

The Charlotte region mirrors and, in several counties, exceeds the national profile. The average producer age across the 14-county region was **59 years** in 2022. Every county reports an average above 56, and the average exceeds 59 in eight of the 14 counties — highest in York County (SC) and Mecklenburg (NC).



Average producer age rose in most counties and remains high across the region, tracking a national workforce that is aging without a clear succession pipeline.

The direction was not uniform. Average producer age rose in 9 counties — fastest in Catawba (+2.2 years) and Lincoln (+2) — and fell in 5. The largest decline was in Anson, down 1.8 years to 56.9, giving the region’s most commercially concentrated county its youngest producer workforce. Where the average falls, it is usually because a commercial operation brought younger family members into the count, not because new independent farmers arrived.



The aging pattern runs deeper than averages suggest: more producers are 65 and older, fewer farms have young operators, and fewer report farming as their primary occupation.

The age numbers alone do not capture the succession gap beneath them. A 2024 Land for Good survey found that only 23 percent of farmers have a formal succession plan, and that 71 percent of retiring farmers have not identified a successor (Land For Good 2024).

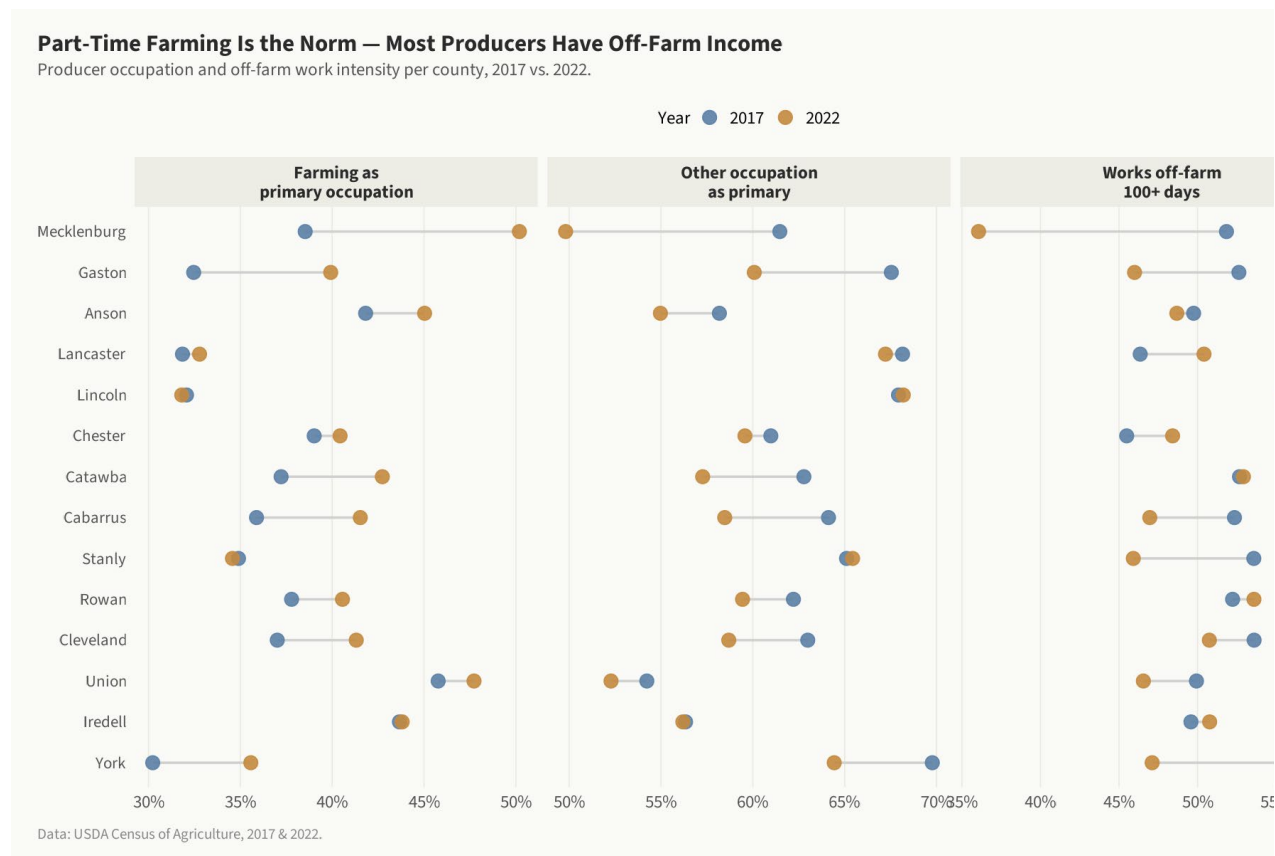
Farm succession is difficult under the best circumstances — it requires financial planning, legal structuring, and family negotiation around topics most families find hard to address. Where land values have appreciated sharply, it becomes harder still: the cost of transferring a farm can exceed what any beginning farmer could finance through production revenue alone. Ownership form also matters — counties with higher corporate and partnership shares (Mecklenburg, Anson, Union) can transfer through stock sales or

board succession, paths that may be smoother than the legal labyrinth of a sole-proprietorship transfer, but that also leave farmland more visible to outside investors.

Working off the farm

In the typical county, nearly **49%** of producers worked 100 or more days per year off the farm in 2022 — a high level, even though the share declined in most counties between censuses.

The declines were steepest where farming sits furthest from the center of the local economy. Mecklenburg fell 16 percentage points, from 52% to 36%, and York (SC) fell 9 points, from 56% to 47%. In both, the likeliest explanation is compositional: as mid-sized operations exit, the producers who remain are disproportionately retirees and landowners not working a second job rather than working-age households holding one. In 5 counties the share moved the other way, led by Lancaster (SC) (+4 points) and Chester (SC) (+3) — the two counties adding small, low-revenue operations of exactly the kind that require outside wages.



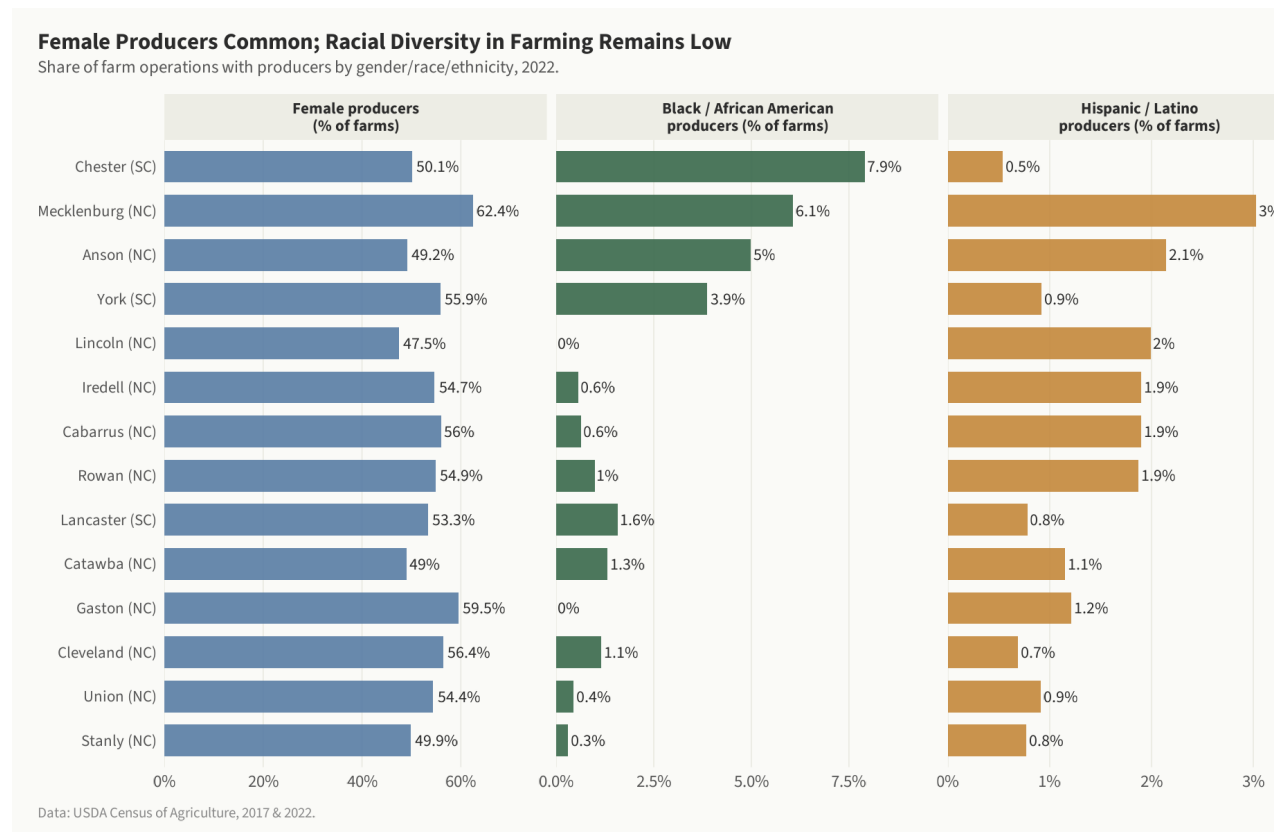
Occupation and off-farm work metrics by county, 2017 vs. 2022, reflecting both economic necessity and a redefinition of what it means to farm in a peri-urban region.

When the majority of producers depend on outside wages to stay solvent, farming becomes more of a land-use decision than a standalone business. That shapes what farms invest in,

how much thought goes into succession, and what kinds of farming survive. USDA Economic Research Service work has long linked heavy off-farm dependence with less commercially intensive operations and thinner buffers against weather and market shocks (USDA Economic Research Service 2024a).

Who is farming — and who is not

The Charlotte region is one of the most racially and ethnically diverse metropolitan areas in the American South. Its farms are not.

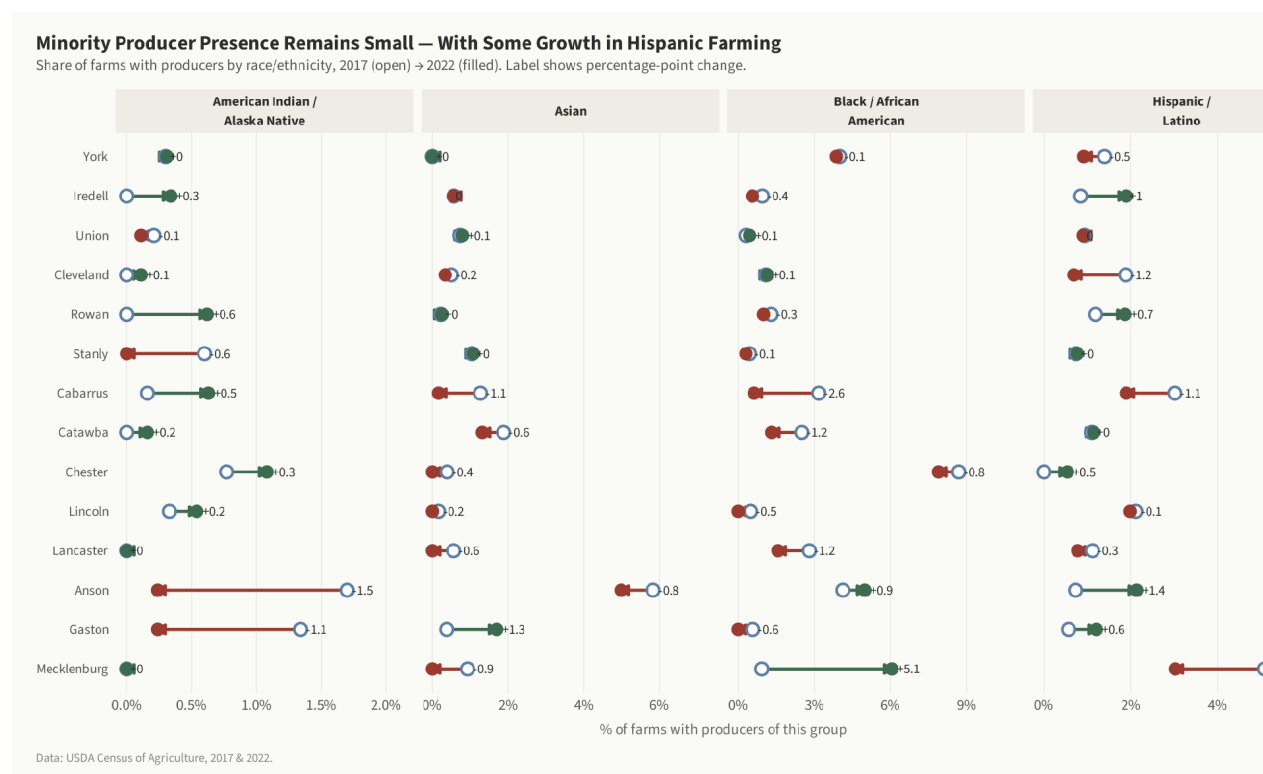


In several counties more than half of all farms now report at least one female producer; racial and ethnic diversity among producers remains far lower.

In several counties, more than half of all farms now report at least one female producer. This reflects real shifts in farm family structure alongside the USDA’s expanded counting methodology, which now enumerates all producers rather than only the principal operator. Whether women hold equivalent decision-making authority is a question the Census does not answer.

Racial and ethnic diversity in farm ownership remains limited. The roots are structural: discriminatory lending by federal agricultural agencies, unequal access to conservation and commodity programs, and a long history of land dispossession concentrated agricultural ownership among white families across the South (Horst and Marion 2019). In the Charlotte region, high land prices compound these barriers — aspiring farmers from

historically underserved communities face both the legacy costs of past discrimination and the present-day cost of entry into one of the most expensive peri-urban land markets in the Southeast.



Minority producer shares vary by county and group. Mecklenburg shows measurable Black and Hispanic shares; Anson and Gaston show growth in Hispanic farming households.

Mecklenburg County shows higher shares of both Black and Hispanic producers, reflecting its diverse urban population. **Anson** and **Gaston** show meaningful growth in Hispanic and Latino producer shares. This mirrors a national pattern: Hispanic and Latino producers are younger on average than all producers (54.9 versus 58.1 years) and more likely to be beginning farmers, with 40 percent having farmed for 10 or fewer years compared with 30 percent of all producers (USDA National Agricultural Statistics Service 2024b). Black producer shares remain low across most of the region, a legacy that targeted investment has only begun to address.

What the evidence suggests

The agricultural transformation underway in the Charlotte region follows patterns documented across urbanizing America. The outcomes are not fixed. Research on farmland protection, farm succession, and agricultural economic resilience points to several evidence-backed interventions.

Conversion is outpacing protection. Conservation easements and purchase-of-development-rights (PDR) programs slow conversion where adequately funded (American Farmland Trust 2022). But the pace of protection remains far below the pace of conversion. The dominant driver of farmland loss in North Carolina is low-density residential subdivision — a process governed not by easements but by county-level zoning, density standards, and subdivision regulations. Few counties have adopted those tools at the scale needed. Easements alone cannot hold a land base against zoning decisions that make agricultural use economically irrational.

And those decisions are not made only in rural counties. Every jurisdiction in the region that declines to absorb its share of housing growth exports that growth to the farmland at the edge, where it arrives as a rezoning request that a rural planning board experiences as inevitable. Farmland protection that treats the urban core as a separate policy arena is defending one end of a land market while leaving the other end unmanaged. The practical implication is that a regional farmland strategy has to include the density conversations happening inside Charlotte’s beltway, not only the easement conversations happening outside it.

The succession gap is just as urgent. The 2022 Census offers one bright spot: beginning farmers nationally rose 11 percent between censuses (USDA National Agricultural Statistics Service 2024c). The barrier is not motivation — it is land cost. In a 2022 survey, 59 percent of young farmers identified finding affordable farmland as “very or extremely challenging,” and the Southeast had among the fewest public policies to address it (National Young Farmers Coalition 2022). NC Farm Link and the Land for Good network have a track record of matching retiring landowners with beginning farmers; sustained funding would extend their reach, particularly to farmers from historically underserved communities (NC State Extension 2024; Land For Good 2024). Without active intervention as corporate and partnership operations face leadership transitions, more land will convert than the market alone will preserve.

Finally, the safety-net gap will bite hardest when prices fall. The drop in federal payment receipt documented in the 2022 Census is partly a market-cycle artifact and partly a structural reality: most small and diversified operations have never qualified for the primary federal programs. For these farms, the practical path forward runs through institutional purchasing by schools and hospitals, direct market sales, and regional food infrastructure. None of these will replace federal safety nets, but they can reduce the exposure those gaps create.

The agriculture Charlotte chooses

The 2022 Census captures a region under real pressure: fewer farms, land priced beyond the reach of new farmers, safety nets diminished, and a producer workforce aging without clear successors. Corporate and partnership structures are expanding, particularly in the most commercially intensive counties.

These are serious structural conditions. They are not a final verdict.

The region still has 8,936 active farms and a productive land base, much of it still in agriculture. A national cohort of beginning farmers wants to farm — if they can access land at prices that allow farming to pay. The policy tools needed to support that transition exist and have evidence behind them. What varies is political will.

Consider Union County: the region's largest average farm, its fastest-growing average acreage, and the 23rd most threatened farmland in the nation. What happens to Union's farms over the next decade — whether they consolidate further, convert to subdivisions, or transition to a new generation of farmers — will depend on decisions made in county zoning boards, state agricultural budgets, and federal conservation programs. That is not a question the data can answer. It is a question the region will answer by what it chooses to protect.

The choice is genuinely hard, because the competing claim is also legitimate. The Charlotte region needs far more housing than it is building, and its affordability crisis is not a lesser problem than its farmland one. "Protect farmland" cannot honestly mean "build less." What it can mean is that *where* the region builds matters as much as how much. Housing added inside the existing footprint — on infill lots, in accessory units, in mid-rise buildings along transit corridors — meets demand while spending almost no farmland. The same number of homes delivered as five-acre lots in Union County spends a great deal of it. Both goals survive a policy that puts growth where the infrastructure already is; neither survives a region that keeps holding the two debates in separate rooms, among different people, as though the land in question were not the same land.

Notes on data and methods

-  All county-level data are drawn from the USDA Census of Agriculture for 2017 and 2022, accessed through USDA's county data query tool (CDQT) (USDA National Agricultural Statistics Service 2019, 2024a). State-level statistics for North Carolina and South Carolina are drawn from the 2022 Census of Agriculture state data tables.

The study area comprises 11 North Carolina counties (Anson, Cabarrus, Catawba, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, and Union) and 3 South Carolina counties (Chester, Lancaster, and York). Union County, NC is used throughout; Union County, SC is excluded from this analysis.

Some values are suppressed by USDA to protect confidentiality when fewer than three operations report a given statistic; suppressed cells are treated as missing. Mecklenburg County is affected most: USDA withholds its average sales per farm, its commodity-mix shares, its labor expense share, and its 2017 expense detail. Charts and medians built on those measures therefore cover 13 counties, and each such figure notes the omission. Mecklenburg's farm counts, acreage, land values, producer characteristics, and government-payment shares are reported in full and appear throughout. Sales-class share figures reported in narrative ("about 45 to 55 percent") reflect underlying counts that may include suppressed categories and are stated as approximations. Average per-farm values are as reported by USDA and reflect the mean across all operations in the county, which may be influenced by a small number of very large operations. Dollar figures are nominal and are not adjusted for inflation; the 2017–2022 interval includes a sharp commodity-price and input-cost cycle, so part of every revenue and expense increase reported here reflects prices rather than volume. Average sales per farm also rise mechanically when low-sales operations exit, so a higher average does not establish that any given surviving farm earns more. National comparison statistics are drawn from USDA ERS research reports and the 2022 Census of Agriculture highlights as cited throughout.

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