

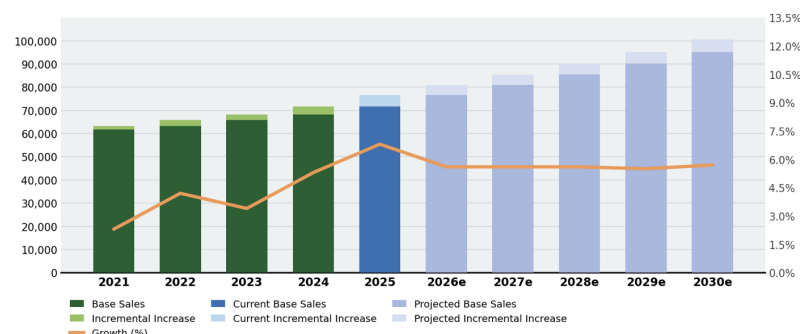
Today's Organic Market Opportunities

Organic demand in the U.S. keeps climbing, and it's outpacing the rest of the food market by a wide margin. Shoppers are spending more than \$76 billion annually on organic products, and they're seeking far more than fruits and vegetables. Top selling organic products at retail include produce, dairy, beverages, packaged goods, and value-added foods. Grains, livestock products, and value-added goods are all in demand, and often imported.

That gap between what buyers want and what U.S. farms produce is creating opportunity for transitioning operations to step in, diversify, and earn stronger margins in markets that are actively seeking new suppliers.

To help you assess opportunities as you plan for long-term, resilient organic growth, here's a peek at the national and regional demand trends, supply gaps, and tips to work effectively with buyers.

FIGURE 1.2. Total U.S. Organic Sales and Growth, 2021-2030e



Organic Market Snapshot

- \$76.6 billion in U.S. organic sales (2025), growing at 6.8% year-over-year
- Organic sales outpace the total food market by nearly 2x
- Organic sales are projected to exceed \$100 billion by 2030

SEGMENT	GROWTH	KEY TRENDS	IMPLICATIONS FOR GROWERS
Meat, Poultry, Seafood	22.5%	Organic beef up +44.3% — now the #1 segment	High-opportunity segment for U.S. livestock producers. Demand for certified organic meat is outpacing domestic supply, opening doors for ranchers to transition and certify. This growth is also opening doors for grain producers and feed processors to support the growing organic beef sector.
Dairy and Eggs	12.8%	Organic eggs +22.4%; yogurt +16.6%	Strong upside for diversified farms. Requires certified feed supply — a call to expand U.S. organic grain production.
Snacks & Candy	7.30%	Better-for-you; dried beans rising	Opportunity for value-added and dry edible bean growers. Demand for clean, plant-based snacks and dried beans (up 13.6%) supports diversified field-crop and processing partners.
Beverages	7.20%	Functional drinks; dairy-alt +18.2%	Growth in value-added processing. Organic fruit and botanical growers can tap into beverage markets with the right processing partners.

Fast-Growing Organic Categories

Animal products, textiles and beverages offer potential for organic growers, particularly those willing to supply feed, diversify or add value.

WHAT'S DRIVING GROWTH

Clean Ingredients Demand for simple, recognizable ingredients

Shrinking Price Gap Organic pricing is more competitive with conventional

Health Trends GLP-1–driven eating habits are increasing demand for cleaner foods

Generational Shift Millennials and Gen Z prioritize sustainability, local foods, and global flavors

Demand for organic products continues to grow, and every region has a different mix of strengths and gaps that matter for farms moving into organic.



The Mid-Atlantic Organic Advantage

A Practical Guide for Farmers & Producers

Organic agriculture in the Mid-Atlantic is gaining steady momentum, supported by long-standing farming traditions, strong per-capita organic demand, and national leadership in several high-value sectors. With nearly 200,000 certified organic acres across six states, the region is anchored by **Pennsylvania, Maryland, and Virginia** — all of which bring depth in livestock, dairy, grains, mushrooms, and specialty crops. Producers in this region benefit from close proximity to over 60 million consumers, robust market premiums, and strong institutional support from top research and extension programs. Together, these assets create a fertile ecosystem for farms looking to transition, diversify, or scale organically.

A Region Defined by Diversity and Proximity

The Mid-Atlantic's organic strength lies in its ability to connect established production systems with some of the densest consumer markets in the nation. Pennsylvania leads the country in organic animal product sales and mushroom production, while Maryland offers a mature grain and vegetable sector bolstered by meaningful state incentives and cost-share programs. Virginia is expanding organic livestock, forage, and transitional acreage, particularly on former tobacco and row-crop land. New Jersey brings high-value specialty production and strong institutional markets, while Delaware and West Virginia contribute niche strengths in poultry, grains, vegetables, and forest-based organics.

Producers across the region benefit from:

- **Robust market access**, with Philadelphia, Baltimore, Washington, D.C., and New York within a day's reach
- **Strong organic sales**, exceeding **\$1.4 billion annually** across the region
- **Diverse cropping and livestock systems**, enabling risk mitigation and year-round economic opportunity
- **Deep technical support**, driven by institutions like Rodale Institute, University of Maryland, and Virginia Tech
- **A resilient acreage base**, with roughly **3,050 certified operations** across the corridor

This unique combination of scale, diversity, and proximity positions the Mid-Atlantic as a national model for regionally rooted organic supply chains.

STATE	CERTIFIED OPERATIONS (2026)	CERTIFIED ACRES (2026)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Delaware	87	3,776	Corn, chicken, vegetables	75% of households buy organic
Maryland	198	16,203	Chickens, milk, soybeans	85% of households buy organic
New Jersey	706	3,542	Mushrooms, tomatoes, blueberries	47% of farms plan expansion; 82% of households buy organic
Pennsylvania	1,664	120,603	Chickens, eggs, mushrooms	3rd in nation for organic operations; \$20 M in OREI/ORG funding
Virginia	333	21,658	Chickens, tobacco, milk	Organic farms hire 150% more workers than conventional
West Virginia	70	35,793	Chickens, eggs, milk	75% of households buy organic

What the Region Produces — and Where It's Headed



Poultry, Eggs & Livestock: The Anchor of the Mid-Atlantic Economy

Organic poultry and egg systems dominate regional farmgate sales, supported by dedicated feed corridors, vertically integrated supply chains, and strong institutional markets. Pennsylvania remains the country's leader in organic animal products, while Maryland and Virginia continue expanding livestock and pasture-based systems. Opportunities include strengthening regional feed self-sufficiency and expanding processing infrastructure tied to poultry, dairy, and diversified livestock.

Specialty & Protected Agriculture: High-Value Production with Local Demand

The region's temperate climate, metro access, and long growing season make it ideal for specialty crops, greenhouse systems, mushrooms, herbs, and fresh-market vegetables. New Jersey excels in high-value produce, while Pennsylvania leads nationally in mushrooms. As demand for local organic intensifies, producers are well positioned to scale protected culture, leafy greens, herbs, berries, and value-added specialty products.

Grains & Feed Systems: A Critical Regional Opportunity

Feed self-sufficiency is a top priority for Mid-Atlantic livestock systems. Maryland anchors the organic grain corridor, while Pennsylvania and Virginia continue to expand small grains, forages, and feed crop rotations. Increasing organic corn, soybeans, small grains, and rotational legumes will reduce the region's dependence on imported organic feed — improving margins and stabilizing poultry, dairy, and beef supply chains.

Regional Challenges — and Producer-Led Solutions

Despite strong momentum, the region faces several structural challenges that shape the next wave of opportunity:

- **Gaps in feed and grain availability**, creating bottlenecks for poultry and dairy systems
- **Limited processing and aggregation capacity**, especially for livestock, grains, and specialty crops
- **Labor shortages**, particularly for diversified and specialty operations
- **Infrastructure gaps** in storage, packing, and distribution

These challenges point directly toward practical, producer-focused solutions:

- **Reinvest in local feed milling, grain storage, and processing** to keep value in-region
- **Strengthen cooperative models** for aggregation, marketing, and distribution
- **Expand protected agriculture and season extension**, especially near metro markets
- **Support transition programs** that help producers convert row-crop and tobacco acreage into organic production
- **Build stronger cross-state supply chains**, linking grain, poultry, dairy, and produce markets

When these systems are aligned, the region becomes more resilient, more profitable, and better positioned to meet rapidly growing demand.

Looking Ahead: A Region Poised for Continued Organic Growth

With national leadership in mushrooms, poultry, and dairy — and rising investment in grains, feed systems, and high-value specialty crops — the Mid-Atlantic is positioned to deepen its role in U.S. organic agriculture. Its combination of fertile farmland, strong research institutions, and unmatched consumer proximity creates an ideal environment for farms ready to expand or transition into organic.

Whether scaling livestock operations, expanding specialty produce, strengthening grain rotations, or investing in protected agriculture, producers in the Mid-Atlantic are building a more connected, resilient, and market-ready organic future — one shaped by collaboration, innovation, and regional pride.

WORKING EFFECTIVELY WITH BUYERS

*"Do your homework. Go to the store and do research.
Come in with your eyes wide open."*

— Kenny, Natural Foods Retail Buyer

*"It doesn't do any good to grow it, if you don't know where
you're going to sell it."*

— Steve, Certified Organic Orchard

What Do Buyers Want?

Buyers value clear communication, dependable follow-through, and partners who understand their pricing, timing, and operational constraints.

They care about the farms behind their products and appreciate growers who are transparent, collaborative, and invested in long-term relationships.

Finding and Connecting with Prospective Buyers

Attend Conferences, Trade Shows & Field Days

Events bring together retailers, distributors, chefs, and foodservice buyers looking for new suppliers.

Ask Neighbors & Fellow Producers

Farmers often know who pays well, communicates clearly, and buys consistently.

Use Directories & Market Databases

Directories, including the Organic Integrity Database help you find buyers by category, product type, or region.

Review Buyer Websites for Vendor Requirements

Many buyers provide clear instructions about:

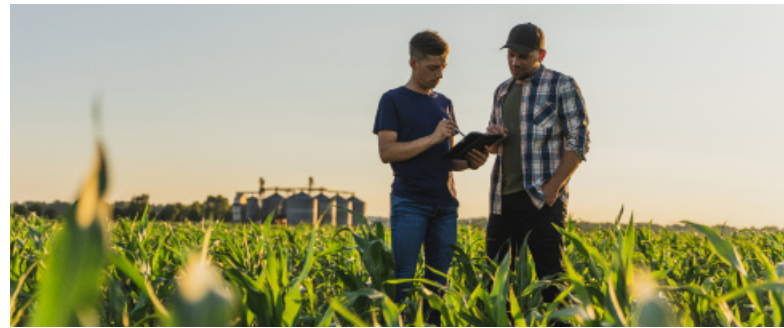
- Packaging, labeling, and certification requirements
- Insurance and transportation expectations
- Instructions for submitting new products or samples

Reach Out Directly

A short, targeted email or call is expected—and welcomed

Work With Your Local Food Hub or Distributor

Food hubs and regional aggregators often buy from small and mid-sized farms and already have strong relationships with retailers and institutions.



Grocery Buyers

It can take as long as a full year to get into the larger, national retail chains while independent retailers may be able to bring in new vendors/farmers within days.

Distributor/Wholesale Buyers

These buyers need transportation solutions that keep their trucks full. If you know of other certified organic farmers in your region, let the buyers know there is more than one reason to send a truck your way.

Institutional Buyers - School Districts and Foodservice

School districts we interviewed want organic root vegetables and correctly sized fruit, especially apples, oranges, and berries for the entire school year. Schools also often buy B grade fruit and vegetables.

Grain Buyers - Feed & Food

Ask the buyer for crop specifics before buying seed or planting. Some require particular varieties and some even offer seed programs/bulk buying opportunities for growers.

Fiber and Seed Buyers

If you grow cotton, participating in a Cotton Co-operative will greatly enhance your ability to sell your crop. If you grow seed, know all legal requirements in advance and save yourself from future headaches.

Dairy / Whole Milk Buyers

Transportation and product quality are watchwords for these buyers. Ask about bonuses for quality or volume improvements.

**You can find additional resources
and support at the links below.**

markets@rodaleinstitute.org
organictransition.org/region/national
<https://rodaleinstitute.org/education/resources/>

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