

A FARMER'S TOOLKIT: FAST FACTS

What is "A Farmer's Toolkit"?

"A Farmer's Toolkit 2026", is a free, comprehensive resource from [Rodale Institute](#) with support from the [Organic Trade Association](#). It was made possible by a [USDA Transition to Organic Partnership \(TOPP\)](#) grant. It brings market information down to the farm level and is targeted at all types of growers - those considering transitioning to organic and those already in certified organic production. It is intended to help farmers, ranchers and the organizations that support them understand where organic opportunities may exist and what it could take to reach those markets.

The toolkit combines national, regional and state data with commodity information and interviews with 28 buyers of organic. The aim is practical: to help producers understand what is selling, who may buy it, what buyers require, and what needs to be in place before making production decisions. All of the toolkits – [National Toolkit](#), Regional Toolkits, State Toolkits, and The Buyers Landscape Toolkit – are farmer friendly and easily downloadable on mobile devices.

Why now?

Organic sales in the U.S. reached \$76.6 billion in 2025, a 6.8% increase from the prior year. The organic market is projected to exceed \$100 billion by 2030¹, with much of the recent growth from sales outside the produce aisle:

- According to the [Organic Trade Association's 2026 Organic Market Report](#), organic meat, poultry and seafood sales rose 22.5% in 2025, topping \$3 billion for the first time.
- Organic beef sales jumped 44.3%, surpassing poultry as the largest organic meat segment.
- Dairy and egg sales increased 12.8%, with gains of 22.4% for eggs, and 16.6% for yogurt¹.

While these are all positive trends for organic agriculture, in truth, there are overt gaps in the organic supply chain. Now, producers can swiftly access where those gaps currently are in their location and use relevant data to inform their next season's production choices. For example, researchers for the National Toolkit found that there is a profound gap in certified organic grain - feed grade³. This impacts organic livestock production. If more farmers could transition to organic practices for feed grade corn and soy, this would benefit livestock production domestically.

What are we importing that could be grown in the U.S?

Imports are an established part of the U.S. organic market and not every imported product can realistically be produced domestically. Coffee and bananas are obvious examples. USDA tracked about \$800 million in U.S. organic exports in 2025⁵.

The more useful question for U.S. agriculture is where imports duplicate with crops and livestock that American farmers can produce. The toolkit identifies beef, berries, feed grains and fiber among the areas where imports and growing demand may point to opportunities for additional domestic production, provided the economics, growing conditions, and infrastructure make sense.

Beef is one example. Organic beef sales rose 44.3% in 2025, while beef was also the largest tracked organic import by value⁴. Processed soybeans ranked among the top 10 tracked organic imports despite the scale of U.S. conventional corn and soybean production. Approximately 99% of U.S. organic cotton consumption is imported².

What does this mean for farmers?

Growing demand does not automatically make organic production a good decision for every farm. Before committing land, livestock or capital, producers need to know whether there is a buyer, what that buyer needs and how the product will reach the market. Processing capacity, storage, transportation and aggregation can be as important as the ability to produce the crop or livestock.

For this reason, the toolkit looks at opportunities by state and region so there is geographic relevance, rather than offering a single prescription for expanding organic production.

What are buyers saying?

Twenty eight organic buyers contributed their first-hand insights to The Buyer's Landscape. They included independent retailers, regional and national grocery chains, school districts and foodservice institutions, grain and feed companies, seed buyers, dairy processors, cotton businesses and direct-to-consumer brands.

While buyer requirements vary, several themes recur. Buyers want consistent supply and quality, clear communication, and producers who understand their specifications. Organic certification gets a product through the door, but it does not guarantee a sale. Volume, timing, transportation, and the ability to aggregate production can determine whether a relationship works.

How local does the toolkit get?

"A Farmers' Toolkit" translates the national market into eight regional overviews: Northeast, Mid-Atlantic, Southeast, Midwest, Central Plains, Southwest, West and Northwest. Individual profiles cover all 50 states, Puerto Rico and the U.S. Virgin Islands. They include certified operations and acreage, leading commodities, market opportunities and barriers, along with technical assistance, certification cost-share, and funding resources available to producers.

Where are the data gaps?

One challenge is timing. Current consumer and trade figures are considerably newer than the most comprehensive national farm-production data.

The market figures primarily reflect 2025 sales, while much of the USDA production and farm-gate information comes from the [2021 Certified Organic Survey](#) and the [2022 Census of Agriculture](#). That lag makes it harder to see how quickly U.S. production is responding to changes in demand.

USDA conducted its 2025 Organic Survey in December 2025, with results scheduled for release Oct. 30, 2026. Those results should provide a more current picture of certified acreage, production and farm sales and help sharpen future market analysis.

Who developed and funded the toolkit?

The Rodale Institute developed the toolkit through TOPP as part of a national partnership led by the Organic Trade Association. TOPP grew out of USDA's \$300 million Organic Transition Initiative, launched in 2022 to support organic farmers and farmers transitioning to organic production. Wolf & Associates was contracted to lead and develop the project and conduct 18 months of research and analysis to date.

What is included?

"A Farmer's Toolkit" includes a national market analysis, eight regional overviews, individual state data sheets, the Buyer's Landscape, interviews with certified organic farmers and regional handouts. Resources for farmers are free and available without signing in. Additional presentation and training materials are available for technical-assistance providers and other organizations working with producers.

Where does the information come from?

Market figures come primarily from the Organic Trade Association's 2026 Organic Market Report, which covers calendar-year 2025 consumer sales. Production and farm-gate figures are mainly sourced from USDA's Certified Organic Survey and the 2022 Census of Agriculture. Trade figures come from USDA's Agricultural Marketing Service and Foreign Agricultural Service, as compiled by OTA. Sources are cited throughout the toolkit and listed in full at the end of each document.

Visit <https://rodaleinstitute.org/farmer-toolkit/> for full access to the resources.

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Sources:

¹ *A Farmer's Toolkit: Advancing Regional Organic Markets*, 2026 Edition, The National Landscape, pp. 3, 6.

² *A Farmer's Toolkit: Advancing Regional Organic Markets*, 2026 Edition, Southwest Overview, p. 32

³ USDA National Agricultural Statistics Service, 2021 Certified Organic Survey

⁴ USDA Agricultural Marketing Service, National Organic Program Update, Jan. 2026

⁵ *USDA FAS, GATS*