



ADVANCING REGIONAL ORGANIC MARKETS
THE NATIONAL LANDSCAPE

A FARMER'S TOOLKIT

2026 EDITION

Wolf & Associates
THE ORGANIC SPECIALISTS



NATIONAL
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM



Table of Contents

About A Farmer's Toolkit

National Toolkit: The U.S. Organic Market

Northeast Regional Overview

Mid-Atlantic Regional Overview

Southeast Regional Overview

Midwest Regional Overview

Central Plains Regional Overview

Southwest Regional Overview

West Regional Overview

Northwest Regional Overview

Farmers' Insights

A Buyer's Landscape: Perspectives from the Marketplace

Appendix A: State Data Sheets

Northeast | Connecticut / Maine / Massachusetts / New Hampshire / New York / Rhode Island / Vermont

Mid-Atlantic | Delaware / Maryland / New Jersey / Pennsylvania / Virginia / West Virginia

Southeast | Alabama / Florida / Georgia / Louisiana / Mississippi / North Carolina / Puerto Rico / South Carolina / U.S. Virginia Islands

Midwest | Arkansas / Illinois / Indiana / Iowa / Kentucky / Missouri / Ohio / Tennessee / Wisconsin

Central Plains | Colorado / Kansas / Nebraska / North Dakota / Oklahoma / South Dakota

Southwest | New Mexico / Texas

West | Arizona / Hawaii / Nevada / Northern California / Southern California / Utah

Northwest | Alaska / Idaho / Montana / Oregon / Washington / Wyoming

Appendix B: Regional Handouts

Northeast Regional Handout

Mid-Atlantic Regional Handout

Southeast Regional Handout

Midwest Regional Handout

Central Plains Regional Handout

Southwest Regional Handout

West Regional Handout

Northwest Regional Handout

ABOUT A FARMER'S TOOLKIT

This paper is the national companion to A Farmer's Toolkit, a set of market-development resources built to help U.S. growers understand and act on the demand for certified organic food.

Where the toolkit's slide decks present the landscape at a glance, this document provides additional information and details in a narrative format, in order to give farmers, technical-assistance providers, and partner organizations the context, the numbers, and the reasoning behind where the organic opportunity is heading as the decade reaches its midpoint.

THE COMPLETE TOOLKIT HAS THREE LAYERS

The first is the national landscape covered here: how large the organic market is, how fast it is growing, what consumers are buying, what U.S. farmers actually produce, and where domestic supply still falls short of demand.

The second layer is a set of regional analyses that follow the USDA Transition to Organic Partnership Program (TOPP) regions, translating the national picture into the crops, channels, and constraints that matter in each part of the country. This section provides an overview for each TOPP Region, with more detailed data provide for each state.

The third section is a buyer landscape, drawn from direct interviews with the wholesale buyers, distributors, food hubs, and processors who decide what reaches the shelf.

A NOTE ON SOURCES AND TIMING

The market figures in this paper come primarily from the Organic Trade Association's 2026 Organic Market Report, which reports calendar-year 2025 consumer sales.

Production and farm-gate figures come from USDA's most recent Certified Organic Survey (2021 data) and the 2022 Census of Agriculture; USDA's next Organic Survey was mailed in December 2025, with results likely available in early 2027, and will refresh the production picture significantly. Trade figures come from USDA's Agricultural Marketing Service and Foreign Agricultural Service as compiled by OTA.

Sources are reports inline in short form and listed in full at the end.



ADVANCING REGIONAL ORGANIC MARKETS

NATIONAL TOOLKIT

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THE NATIONAL ORGANIC MARKET IN 2025

U.S. organic sales reached a new high of \$76.6 billion in 2025, a 6.8% increase over the prior year and the strongest growth the sector has seen since the 2020 pandemic surge (OTA, 2026). That expansion was roughly double the 3.4% growth of the total comparable marketplace — the second consecutive year organic outpaced the broader market. For a category often described as mature, organic is still gaining share rather than holding ground.

Within that total, organic food accounted for \$70.1 billion and grew 6.9%, three times the 2.3% growth of the total food market, lifting organic's penetration of all food sales to 6.1%. The remaining \$6.5 billion came from organic textiles, dietary supplements, personal care, and pet food, which grew 5.9% but still represent just under 1% of sales in those comparable categories, a reminder of how much headroom remains outside the grocery aisle.

The longer arc matters as much as the single year. Since 2016, the total organic marketplace has grown at a compound annual rate of 5.9%, and OTA forecasts another roughly \$24 billion in new sales over the next five years, with the market crossing the \$100 billion threshold in 2030 (OTA, 2026). For growers weighing a multi-year transition, the relevant signal is not any one year's rate but the consistency: organic demand has continued to compound as inflation, supply shocks, and shifting trade policy present substantial headwinds.

WHAT CONSUMERS ARE BUYING

Produce remains the anchor of the organic market and the primary entry point for new organic shoppers. At \$22.7 billion in 2025, organic produce accounted for nearly 30% of all organic sales and reached 16.0% penetration of the total produce market — by far the deepest of any category. The \$4.4 billion berry segment continued to lead produce, growing 10.5%, while greens and packaged salads were essentially flat (OTA, 2026).

Grocery, the second-largest category, reached \$15.7 billion on 4.2% growth, with bright spots in organic baby food and formula (up 8.8%) and in dried beans, fruits, and vegetables (up 13.6%) as shoppers reached for shelf-stable, plant-forward, clean-label options. Beverages reached \$10.2 billion on 7.2% growth, led by coffee — still the single largest beverage subcategory — and by fast-growing functional drinks and dairy alternatives, the latter up 18.2%.

The categories that grew fastest, however, sit lower in the rankings by size, and they are the ones most relevant to producers. The leading categories by 2025 sales were produce (\$22.7B), grocery (\$15.7B), beverages (\$10.2B), dairy and eggs (\$9.6B), snacks and candy (\$5.3B), frozen (\$3.5B), and meat, poultry, and seafood (\$3.1B), alongside the \$6.5 billion non-food group (OTA, 2026). Frozen was the lone laggard, essentially flat at 0.2% despite a 33.7% surge in organic ice cream.

WHERE GROWTH IS ACCELERATING

Two categories stand out for growers because their growth is being driven by demand for animal protein and the feed behind it. Organic meat, poultry, and seafood grew 22.5% in 2025 and crossed the \$3 billion mark for the first time. The headline within that category is beef: organic beef sales rose 44.3%, the fastest growth of any organic subcategory, and beef surpassed poultry to become the largest segment in the category for the first time, reaching about \$1.4 billion (OTA, 2026). Much of that volume is currently imported, a point we return to in the onshoring section of this report.

Organic dairy and eggs grew 12.8%, the category's strongest year since 2020. Organic eggs rose 22.4%, buoyed by conventional egg shortages tied to avian influenza, and organic yogurt grew 16.6%. Both depend on a reliable supply of certified organic feed, which directly ties dairy and egg demand back to the grain and oilseed opportunity. Snacks and candy grew 7.3%, supported by demand for better-for-you indulgence and the same rise in dried beans and legumes seen in the grocery aisle.

Read together, the fastest-growing subcategories of 2025 — berries (+10.5%), milk and cream (+9.3%), coffee (+8.9%), eggs (+22.4%), and yogurt (+16.6%) — point to a market that is broadening well beyond fresh produce into protein, dairy, and value-added foods. For U.S. growers, that breadth is the opportunity: diversification into feed grains, livestock, and value-added production, not just more of the same produce.

WHAT IS DRIVING DEMAND

Several forces are reinforcing one another behind organic's growth. The first is a sustained consumer focus on clean ingredients — simpler, recognizable formulations free of synthetic pesticides, colors, and preservatives — which maps directly onto what organic certification guarantees. The second is a narrowing price gap: as the premium over conventional has compressed in many categories, the barrier to choosing organic has fallen.

Health and demographic trends are accelerating both. The popularity of GLP-1 medications and a broader “food as medicine” mindset have pushed consumers toward higher-protein, less-processed eating, which benefits organic dairy, eggs, and meat in particular. And the demand is generationally durable: Millennials and Gen Z, the fastest-growing organic buyer segments, weigh the impact of production on people, the planet, and animals when they shop (OTA, 2026). Underpinning all of it is trust in the USDA Organic seal, which OTA reinforced in 2025 with its “Seal Makes it Simple” consumer campaign.

WHAT U.S. FARMERS GROW

Against that demand sits a smaller, more concentrated domestic production base. USDA's most recent Certified Organic Survey put U.S. certified organic farm-gate sales at \$11.2 billion in 2021 across 17,445 certified farms and roughly 8.1 million acres (USDA NASS, 2021); the 2022 Census of Agriculture counted about 17,048 NOP-certified farms (USDA NASS, 2024). Certified organic cropland rose 79% between 2011 and 2021, to about 3.6 million acres. This represents real growth, but still a fraction of one percent of total U.S. cropland for staple commodities like corn and soybeans.

Production is also geographically and categorically concentrated. California alone accounted for \$3.55 billion, or 32% of national organic sales, in 2021, followed by Washington, Pennsylvania, Texas, and Oregon (USDA NASS, 2021). By value, the largest domestic categories are produce (an estimated \$4.1 billion) and dairy (about \$2.0 billion). Grains and oilseeds (roughly \$750 million), poultry and eggs (about \$800 million), and livestock (about \$500 million) remain comparatively underdeveloped, and organic cotton is nearly nonexistent at the farm gate.

The takeaway is structural: domestic organic production leads in produce and dairy but is thin in exactly the grains, proteins, and fibers where demand is now growing fastest. That gap represents a major opportunity, and is filled today largely by imports. USDA's 2025 Organic Survey, the results of which are expected in early 2027, will provide the first refreshed national production picture in five years and should be read closely when it lands.

THE IMPORT GAP AND THE ONSHORE OPPORTUNITY

Because demand has outrun domestic supply in several categories, imports fill the difference, and in 2025 the clearest example was beef. Beef became the single largest tracked organic import, at 8.5% of import value, after import volumes jumped 44%, with product arriving from Canada, Australia, Argentina, and Uruguay (OTA, 2026). The next-largest tracked imports were coffee (7.3%), bananas (5.0%), fruit juice (3.9%), blueberries (3.3%), avocados (3.3%), processed soybeans (3.1%), olive oil (2.9%), chocolate (2.8%), and strawberries (2.4%). Mexico (20.6%) and Canada (16.0%) are the leading countries of origin, followed by Peru, Uruguay, and Italy.

Some of those imports, including coffee, bananas, and cocoa, reflect crops the U.S. cannot grow at scale and will always source abroad. But others map onto categories where domestic supply could realistically close the gap. Produce is the largest import category overall, with an estimated \$2.5 billion or more in organic fruits and vegetables imported in 2024, representing 35–45% of total organic import value. Feed grains remain the structural bottleneck behind the protein boom: U.S. organic corn (\$424M) and soybeans (\$242M) together generated about \$666 million in farm-gate sales in

2021, yet processed soybeans were again a top-ten organic import in 2025. This is a direct signal of unmet demand from organic dairy, egg, and meat producers who need certified feed.

Encouragingly, the feed-grain picture showed early signs of rebalancing in 2025: improved organic feed availability and a degree of surplus supply lowered feed prices and helped livestock producers scale (OTA, 2026). On the export side, USDA's Foreign Agricultural Service tracked about \$800 million in organic exports, though OTA estimates true export value is closer to \$3 billion once unrepresented processed products are counted; Mexico and Canada are again the top destinations. The net structural picture is unchanged: the U.S. organic market is strong but import-dependent in key categories, and the biggest onshoring opportunities lie in produce, feed-grain rebuilding, and organic beef and the feed required to raise it.

POLICY AND MARKET CONTEXT

Several policy developments in 2025 shape how this opportunity plays out. The Strengthening Organic Enforcement (SOE) rule moved from transition into full enforcement, tightening import documentation and reducing fraud risk across global supply chains, a major structural support for the integrity of the USDA Organic seal. In December 2025, the bipartisan, bicameral Domestic Organic Investment Act (DOIA) was introduced; building on USDA's 2023 Organic Market Development Grant program, it aims to expand domestic production and processing capacity and to reduce import reliance, precisely the gap we identify in this report (OTA, 2026).

Other developments cut both ways. New tariffs on imported organic sugar (more than \$85 million, effective October 2025) raised costs for brands dependent on imported supply, while higher import costs could, over time, improve the price competitiveness of domestic organic crops. Labor availability and immigration enforcement continued to strain organic farming and processing. And federal investment in organic transition programs faces uncertainty even as demand remains strong. For growers and the organizations supporting them, the practical implication is that stable consumer demand, rather than the year's policy weather, is the firmer foundation for transition decisions.

WHAT THE NATIONAL LANDSCAPE MEANS FOR GROWERS

The U.S. organic market is not just growing; it is dynamically evolving. Demand is broadening from fruits and vegetables into grains, livestock, fiber, and value-added goods, and it is in those newer, underdeveloped segments that domestic producers have the most room to lead. Four themes carry directly into the regional and buyer-landscape companions:

- **Scale of demand.** At \$76.6 billion and growing about twice as fast as the overall marketplace, with organic food growing three times as fast as total food, organic is a stable, compounding market, not a niche.
- **New demand in protein, dairy, and grains.** The fastest growth is now in meat (+22.5%, beef +44.3%) and dairy and eggs (+12.8%), categories that depend on certified feed and open the door for grain, oilseed, and livestock producers.
- **Import replacement is a real need and opportunity.** Organic beef, feed grains, and key produce items are still heavily imported and needed domestically; closing those gaps is a concrete, near-term opportunity rather than a long-range aspiration.
- **Region matters.** Every farm, in every region, helps close the gap between what U.S. shoppers buy and what U.S. farmers grow — the question each regional companion takes up is which specific crops and channels offer the most leverage locally.

The regional analyses translate these national signals into specific crops, buyers, and infrastructure needs; the buyer landscape adds the demand-side view of what wholesale purchasers are actually looking for. Read together with this national companion, they are meant to help a grower move from “organic demand is growing” to “here is where I fit.”

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NATIONAL TOOLKIT
THE U.S. ORGANIC MARKET

NORTHEAST

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NORTHEAST OVERVIEW

This paper is the Northeast regional overview in A Farmer's Toolkit, covering the seven state profiles included in this toolkit's appendix: Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, and Vermont. Note that we've split the Northeast/Mid-Atlantic TOPP region into two for the purposes of this analysis. Where the national companion establishes the size and shape of the organic opportunity, this document sets the regional context, and the state profiles in Appendix A carry the detail, with state-by-state data, opportunities and barriers, and the specific certification, technical-assistance, and market-access resources available to farmers in each state.

THE NORTHEAST ORGANIC MARKET

The U.S. organic market reached a new high of \$76.6 billion in 2025, up 6.8%, roughly twice the growth of the total marketplace, with organic food growing three times as fast as total food (OTA, 2026). The Northeast is one of the most mature expressions of that demand, distinguished by three things: (1) its density of consumers, (2) its diversified small-to mid-scale farms, and (3) the institutional and policy infrastructure that supports them. Across the seven states, about 3,990 certified organic operators work more than 1.3 million certified organic acres, and the region's farms command among the highest per-acre and per-farm revenues in the country, a direct result of their proximity to major metropolitan markets.

Those markets are the region's defining advantage. New York City anchors an organic food market estimated at more than \$3 billion, the largest single urban organic market in the United States, within two hours of the Hudson Valley, Long Island, and the Finger Lakes. Greater Boston ranks among the top five U.S. organic markets and draws on farms across Massachusetts, southern New Hampshire, and Rhode Island. Providence's farm-to-table density and the affluent suburban corridors of Connecticut round out a regional demand base that rewards freshness, traceability, and direct-market relationships. The short distance between farm and market is itself a competitive advantage and helps to mitigate costs amidst currently volatile fuel prices.

THE SEVEN STATES

Each state carries its own profile in Appendix A. The regional pattern they form is worth setting out first.

New York anchors the region. With 2,068 certified organic operations across 985,648 certified acres, it ranks second nationally, and its roughly \$311 million in organic sales, world-class North Country and Hudson Valley dairy industry, Finger Lakes grain sector, and the organizational strength of NOFA-NY make it the region's production and market center, all of it feeding New York City's \$3 billion organic market (state profile; USDA NASS, 2024).

Vermont leads the nation in certified organic farms per capita. Its 797 operations across 200,989 certified acres are built around organic dairy, maple, and diversified vegetable and orchard farms, supported by \$14.3 million in OREI/ORG research funding and a 50-year NOFA-VT and University of Vermont Extension network that serves as a national model for state-level organic ecosystems. Its defining challenge is succession: keeping legacy farms in production as operators age.

Maine is New England's organic frontier in terms of potential. Anchored by MOFGA, the oldest and largest state organic organization in the country, Maine's 474 operations and 70,772 certified acres center on globally distinctive commodities: the state grows 99% of the nation's wild blueberries and premium Aroostook County potatoes, with \$7.4 million in OREI/ORG funding and five decades of organic leadership.

The southern New England states trade acreage for market access, and their economics rest on premium per-farm revenue rather than scale. Massachusetts (317 operations, 4,082 acres) supplies Boston and Cambridge (a top-five U.S.

organic market) with vegetables, Pioneer Valley dairy and cheese, and South Shore cranberries. Connecticut (166 operations, 34,790 acres) commands among the highest per-acre organic premiums in the nation from its dense suburban corridors. New Hampshire (124 operations) and Rhode Island (48 operations) are the region's smallest producers but post high per-farm revenues (about \$38 million and \$19 million in organic sales respectively) by selling directly into the greater Boston market and Providence's culinary scene (state profiles; USDA NASS, 2024).

The common thread across all seven states is that demand is deep and close, while the binding constraint is supply: land access, farm scale, and season length.

WHERE THE OPPORTUNITY CONCENTRATES

The Northeast's climate and market proximity make it well suited to diversified, high-value organic produce, and the clearest near-term opportunities cluster in a handful of categories where regional demand outruns regional supply.

Berries are the flagship opportunity. Demand for organic blueberries and raspberries is high and year-round, but regional supply is seasonal and thin in the shoulder months. This gap drives premium pricing, and protected agriculture approaches such as high tunnels and greenhouses can help close it. Maine's wild blueberry barrens, which supply 99% of the U.S. crop, could support onshoring. Most are still managed conventionally, and bringing more acreage into certified organic production would meet surging functional-food demand. Leafy greens are also strong in season, weak in winter, and ripe for the season-extension and controlled-environment investment that would let buyers source locally year-round. Apples remain a regional staple with strong identity and are constrained by storage rather than production.

A second tier of specialty and value-added crops strengthens farm income and resilience. Mushrooms such as shiitake and oyster are high-margin, low-footprint, and undersupplied. Massachusetts cranberries and Vermont and New Hampshire maple are established premium categories with room for organic certification to grow. Fresh and processing tomatoes face a short season but pair naturally with New York's existing processing infrastructure, and culinary herbs (basil, cilantro, parsley) carry rising retail and foodservice demand and scale easily in protected systems, where local freshness is a real differentiator.

Underneath all of it sit grains and dairy, the foundation of the regional organic economy. Organic dairy anchors the sector in New York and Vermont and drives demand for pasture, infrastructure, and, critically, certified organic feed. Feed grains (corn and soy) are the region's structural bottleneck: reliance on imported organic feed undermines price stability and integrity, and expanding regional grain capacity (where New York's Finger Lakes and western counties hold the most potential) is the single most important step toward a resilient regional dairy, egg, and poultry sector.

THE IMPORT GAP AND THE ONSHORING OPPORTUNITY

The national section of this toolkit documents an organic market that is import-dependent in exactly the categories the Northeast can produce. Several of the report's named top-ten tracked organic imports map directly onto regional strengths. Blueberries (3.3% of import value) and strawberries (2.4%) were both among the largest tracked organic imports of 2025, underscoring the berry opportunity, and Maine's wild blueberry barrens in particular. Processed soybeans remained a top-ten import as well, a direct signal of unmet demand from the organic dairy, egg, and meat producers who need certified feed, and the clearest argument for rebuilding Northeast feed-grain capacity (OTA, 2026).

The same pattern holds across leafy greens (imported heavily in winter), fresh and processed tomatoes, culinary herbs, and organic maple products, where Canada supplies much of the certified product and where a stronger domestic-identity and traceability story could support premium positioning. None of these gaps requires a crop the region cannot grow. Each is a question of season extension, storage, processing, or feed capacity. That makes Northeast onshoring a concrete, near-term proposition rather than a long-range aspiration: the region already has the climate, the grower base, and the market proximity to convert imports into local production.

BARRIERS AND WHAT RESOLVES THEM

The constraints in the Northeast are less about demand than about the cost and availability of land at scale. High land values near the region's metropolitan corridors and small, fragmented parcels are the most frequently cited barriers across the state profiles, making farmland-access programs, transition cost-share, and cooperative aggregation essential to bringing new operators into organic production. The short growing season and weather variability argue for both protected and controlled-environment agriculture and for diversified, soil-focused systems that build resilience. Limited cold storage and small-scale processing capacity can be met with shared regional hubs that reduce waste and extend market reach, and organic feed shortages point back to regional grain and feed programs, especially in New York. The common thread is that targeted investment in land access, infrastructure, protected agriculture, and workforce development turns the region's structural challenges into pathways for year-round growth. The MOFGA, NOFA, Cooperative Extension, and Northeast TOPP networks profiled in the state sheets are built to support that work.

WHAT THE NORTHEAST LANDSCAPE MEANS FOR GROWERS

The Northeast's advantage is not raw acreage. It is the combination of mature demand, organic density, and short farm-to-market distance. Four themes carry forward into the state profiles, the buyer-landscape companion, and individual transition decisions:

- Demand is deep and close. New York City's \$3 billion organic market, a top-five Boston market, and Providence's farm-to-table density put some of the country's highest-value organic buyers within a short drive of most farms, and the region's farms already earn among the highest per-farm revenues in the nation.
- The opportunity is in produce, protein feed, and value-added. Berries and wild blueberries, leafy greens, tomatoes, herbs, mushrooms, apples, and cranberries are high-demand categories where local supply still lags, while feed grains and dairy form the backbone that ties them together.
- Import replacement opportunities are substantial. Blueberries, strawberries, processed soy for feed, winter greens, and organic maple are all import-exposed categories the region can realistically supply. Closing those gaps keeps value in the region.
- The binding constraint is supply, not demand. Land access, farm scale, and season length are the limits, and they yield to farmland-access programs, season extension, regional processing, and the certification and mentorship networks profiled in the state sheets.

The seven state profiles in Appendix A translate this regional picture into state-specific data, opportunities, barriers, and the farmer-support resources available in each state. Read together with the national and buyer-landscape companions, they are meant to help a Northeast grower move from "organic demand is growing" to "here is where my operation can fit into the overall picture."

SOURCES

A note on sources: National market figures come from the Organic Trade Association's 2026 Organic Market Report, which reports calendar-year 2025 consumer sales. State-level figures, including certified operations, acreage, commodities, funding, and sales, are drawn from the toolkit's seven Northeast state profiles, which draw certified operations counts, and acreage where certifier reporting is complete, from current USDA Organic Integrity Database listings, and compile remaining acreage, commodity, funding, and sales detail from OTA state data and USDA's 2021 Certified Organic Survey and 2022 Census of Agriculture. Sources are cited inline in short form and listed in full at the end.

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MID-ATLANTIC

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MID-ATLANTIC OVERVIEW

This paper is the Mid-Atlantic regional overview in A Farmer's Toolkit, covering the six state profiles included in this toolkit's appendix: Delaware, Maryland, New Jersey, Pennsylvania, Virginia, and West Virginia. Note that we've split the Northeast/Mid-Atlantic TOPP region into two for the purposes of this analysis. This paper covers the Mid-Atlantic half, and a companion covers New England and New York. Where the national companion establishes the size and shape of the organic opportunity, this document sets the regional context, and the state profiles in Appendix A carry the detail, with state-by-state data, opportunities and barriers, and the specific certification, technical-assistance, and market-access resources available to farmers in each state.

THE MID-ATLANTIC ORGANIC MARKET

The U.S. organic market reached a new high of \$76.6 billion in 2025, up 6.8%, roughly twice the growth of the total marketplace, with organic food growing three times as fast as total food (OTA, 2026). The Mid-Atlantic concentrates more organic purchasing power per farm-mile than almost anywhere in the country: the Washington-Baltimore-Philadelphia corridor alone holds more than 15 million consumers, with New York City and Pittsburgh pressing on the region's flanks. Across the six states, roughly 3,050 certified organic operations work just over 200,000 certified acres, anchored by Pennsylvania (3rd nationally, with 1,664 certified operations) and by the region's standing as the intellectual home of American organic agriculture at the Rodale Institute in Kutztown (state profiles; USDA NASS, 2024).

Those corridor markets are the region's defining advantage. The DC metro area, including Northern Virginia, has among the highest household incomes and organic food spending rates of any U.S. metro market. New Jersey farms (with 20 million consumers within 100 miles) generate among the highest per-acre organic sales in the nation. As in New England, the short distance between farm and market is itself a competitive advantage. What distinguishes the Mid-Atlantic is that it pairs that proximity with genuine commercial scale in dairy, eggs, and grain.

THE SIX STATES

Each state carries its own profile in Appendix A. The regional pattern they form is worth setting out first.

Pennsylvania anchors the region. Ranking 3rd nationally with 1,664 certified operations and 120,603 certified acres, it holds the nation's highest organic dairy density in Lancaster County's plain community farms, leading organic egg production for national retail, intensive vegetable production serving Philadelphia and Pittsburgh, and a growing organic grain and malt sector. It is also home to the Rodale Institute, whose Farming Systems Trial (running since 1981, the longest side-by-side comparison of organic and conventional systems in the country) provides the scientific foundation for organic agriculture nationally (state profile; USDA NASS, 2024).

Virginia is the region's second production pillar. Its 333 operations and 21,658 certified acres span Shenandoah Valley organic grain and dairy, Piedmont livestock, and tidewater vegetables, all facing the extraordinary depth of the DC-Northern Virginia consumer market. New Jersey (706 operations on just 3,542 acres, 16th nationally) is the region's per-acre value leader, converting proximity to New York and Philadelphia into premium vegetable, fruit, and specialty-crop revenue.

Maryland (198 operations, 16,203 acres) sits at the crossroads of DC and Baltimore demand and carries the region's distinctive environmental narrative: organic practice aligns closely with the Chesapeake Bay nutrient-reduction framework, making transition both economically and ecologically compelling. Delaware (87 operations, 3,776 acres) puts Delmarva grain and vegetable ground within a two-hour drive of more than 15 million organic consumers. West Virginia (70 operations, 35,793 acres) brings the region's most distinctive niche: Appalachian forest farming, where certified organic ramps, ginseng, and specialty mushrooms from some of North America's most biodiverse hardwood forests command prices many times conventional commodities (state profiles; USDA NASS, 2024).

The common thread across all six states is that world-class demand sits directly beside underused supply capacity, with land cost and development pressure (not consumer interest) as the recurring limits.

WHERE THE OPPORTUNITY CONCENTRATES

Dairy, eggs, and poultry are the commercial core. Lancaster County's plain community dairy cluster, Pennsylvania's national-scale organic egg sector, and pastured poultry across Virginia's Valley and the Piedmont form the region's largest organic revenue base, and every one of those operations needs certified organic feed, most of which is currently trucked in or imported.

That makes grain the region's highest-leverage conversion play. Delmarva's conventional corn and soybean ground, the Shenandoah Valley's grain base, and central Pennsylvania's emerging organic grain and malt sector can shorten the feed supply chain for the region's own dairy and poultry farms while supplying Mid-Atlantic artisan mills and a fast-growing craft beverage industry seeking certified local malt.

Produce for the corridor is the third tier: vegetables, fruit, and herbs for DC, Baltimore, and Philadelphia retail, restaurant, and institutional buyers (school districts, hospitals, universities, and federal food service) where farm-to-institution channels remain far from saturated. Around the edges sit high-identity specialties: West Virginia's forest-farmed botanicals, New Jersey's premium berries and peaches, Maryland's Bay-branded produce, and agritourism across the region's affluent countryside.

THE IMPORT GAP AND THE ONSHORE OPPORTUNITY

The national section of this toolkit documents an organic market that is import-dependent in exactly the categories where the Mid-Atlantic can produce. Processed soybeans remained among the top-ten tracked organic imports of 2025, a direct signal of unmet demand from the organic dairy, egg, and poultry producers who dominate this region's organic economy. Rebuilding regional feed-grain capacity on Delmarva, the Eastern Shore, and the Shenandoah Valley is the single most important step toward a resilient Mid-Atlantic organic livestock sector (OTA, 2026; USDA ERS, 2025).

The same pattern holds for winter greens and fresh produce, imported heavily in the months when corridor demand never slackens (a gap that protected agriculture and season extension can close) and for berries, where blueberries (3.3% of import value) and strawberries (2.4%) were among 2025's largest tracked organic imports and New Jersey's and the region's growers hold premium positions. None of these gaps requires a crop the region cannot grow. Each is a question of feed capacity, season extension, and processing. That makes Mid-Atlantic onshoring a concrete, near-term proposition rather than a long-range aspiration.

BARRIERS AND WHAT RESOLVES THEM

The constraints in the Mid-Atlantic are led by land. High land values and active development pressure near DC, Baltimore, Philadelphia, and northern New Jersey limit farmland access and threaten the long-term farm base, the strongest argument in the region for farmland preservation programs, transition cost-share, and the high-value crop mixes that make small acreage viable. Conventional poultry integrator dominance on Delmarva and in the Shenandoah Valley creates land competition and nutrient-management complexity, while organic dairy processor consolidation has brought farmgate price volatility to Pennsylvania's plain community sector, both problems that regional feed capacity, cooperative marketing, and diversified channels help absorb. West Virginia's rugged terrain makes aggregation and distribution the constraint, answered by food hubs and the forest-products niche that terrain itself creates. Maryland's Chesapeake Bay regulatory framework, meanwhile, is as much opportunity as burden: organic practice aligns with Bay requirements, letting conservation cost-share do double duty as transition support. The region's support network (the Rodale Institute, Pennsylvania Certified Organic, Penn State and the region's extension programs, Future Harvest CASA, VABF, NOFA-NJ, the WV Food and Farm Coalition, and Northeast TOPP's mentor matching) is among the deepest anywhere.

WHAT THE MID-ATLANTIC LANDSCAPE MEANS FOR GROWERS

The Mid-Atlantic's advantage is the pairing of corridor demand with commercial-scale organic agriculture and the nation's deepest organic knowledge base. Four themes carry forward into the state profiles, the buyer-landscape companion, and individual transition decisions:

- Demand is deep and close. More than 15 million consumers in the DC-Baltimore-Philadelphia corridor, the nation's highest-spending metro market in greater Washington, and New York City on the region's doorstep put premium buyers within a short drive of nearly every farm.
- The opportunity is in dairy, eggs, grain, and corridor produce. Pennsylvania's dairy and egg leadership, feed-grain conversion on Delmarva and in the Valley, institutional produce channels, and forest-farmed specialties form the regional portfolio.
- Import replacement opportunities are substantial. Processed soy for feed, winter greens, and berries are import-exposed categories the region can realistically supply, and regional feed capacity underpins everything else.
- The binding constraint is land, not demand. Land values and development pressure yield to preservation programs, Bay-aligned conservation cost-share, high-value crop mixes, and the certification and mentorship networks profiled in the state sheets.

The six state profiles in Appendix A translate this regional picture into state-specific data, opportunities, barriers, and the farmer-support resources available in each state. Read together with the national and buyer-landscape companions, they are meant to help a Mid-Atlantic grower move from "organic demand is growing" to "here is where my operation can fit into the overall picture."

SOURCES

A note on sources: National market figures come from the Organic Trade Association's 2026 Organic Market Report, which reports calendar-year 2025 consumer sales. State-level figures, including certified operations, acreage, commodities, funding, and sales, are drawn from the toolkit's six Mid-Atlantic state profiles, which draw certified operations counts, and acreage where certifier reporting is complete, from current USDA Organic Integrity Database listings, and compile remaining acreage, commodity, funding, and sales detail from OTA state data and USDA's 2021 Certified Organic Survey and 2022 Census of Agriculture. Sources are cited inline in short form and listed in full at the end.

Organic Trade Association. 2026 Organic Market Report (calendar-year 2025 consumer sales; U.S. organic sales reached \$76.6 billion, +6.8%; named top-ten organic imports include blueberries and strawberries). <https://ota.com/OrganicMarketReport>

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SOUTHEAST TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

NATIONAL TOOLKIT
THE U.S. ORGANIC MARKET

SOUTHEAST

ADVANCING REGIONAL ORGANIC MARKETS
2026 EDITION



SOUTHEAST OVERVIEW

This paper is the Southeast regional overview in A Farmer's Toolkit, covering the nine state and territory profiles included in this toolkit's appendix: Alabama, Florida, Georgia, Louisiana, Mississippi, North Carolina, South Carolina, Puerto Rico, and the U.S. Virgin Islands. Where the national companion establishes the size and shape of the organic opportunity, this document sets the regional context, and the state profiles in Appendix A carry the detail, with state-by-state data, opportunities and barriers, and the specific certification, technical-assistance, and market-access resources available to farmers in each state.

THE SOUTHEAST ORGANIC MARKET

The U.S. organic market reached a new high of \$76.6 billion in 2025, up 6.8%, roughly twice the growth of the total marketplace, with organic food growing three times as fast as total food (OTA, 2026). The Southeast's claim on that market is unlike any other region's: it is the only part of the continental U.S. that can grow at commercial scale through the winter, and it holds a portfolio of crops (sugarcane, coffee, tea, tropical fruit) that exist nowhere else in American agriculture. Across the seven states and two territories, roughly 1,900 certified organic operations work more than 146,000 certified acres, anchored by Florida's 750 operations and 53,033 acres and North Carolina's 554 operations and 50,307 acres (state profiles; USDA NASS, 2024).

Demand inside the region is growing faster than almost anywhere in the country. Atlanta's 6.2 million residents form one of the Southeast's largest organic consumer markets. The Research Triangle consistently ranks among the top U.S. metros for per-capita organic spending. And Charleston's and New Orleans's culinary tourism economies pay premium prices for local organic supply. Yet certified organic production remains thin. Less than 1% of Georgia farmland is certified, and Alabama pairs a 71% household organic purchasing rate with just 38 certified operations. The gap between what the region's consumers buy and what its farms supply is the opportunity.

THE NINE STATES AND TERRITORIES

Each state and territory carries its own profile in Appendix A. The regional pattern they form is worth setting out first.

Florida is the backbone of national winter supply. Ranking 15th nationally with 750 operations and 53,033 certified acres, it feeds the entire eastern U.S. organic leafy green, bell pepper, tomato, and cucumber supply from November through April, is rebuilding an organic citrus industry against greening disease, and hosts Florida Crystals' 10,000-acre operation, the world's largest regenerative organic farm. Roughly 100,000 acres of failed citrus land along the Highway 27 corridor is available at a fraction of coastal prices, one of the largest affordable-land opportunities for organic expansion anywhere in the country (state profile; USDA NASS, 2024).

The Carolinas pair production depth with the region's strongest farmer institutions. North Carolina (554 operations, 50,307 acres, 18th nationally) spans coastal plain grain, Piedmont poultry, and Blue Ridge specialty vegetables, all within reach of Research Triangle demand, with the Carolina Farm Stewardship Association anchoring certification, advocacy, and farmer community across both states. South Carolina (117 operations) adds Charleston's celebrated farm-to-table market, organically revived Carolina Gold heritage grains, and America's only commercial tea farm. Georgia (373 operations, 22,135 acres) ranks among the top organic blueberry states, with a two-to-three-week harvest-timing advantage over northern producers at peak spring demand and Atlanta on its doorstep.

The Gulf states are the emerging tier. Louisiana (51 operations, 6,771 acres) holds a genuine national monopoly: as the only U.S. state producing commercial sugarcane, it is the sole domestic source of certified organic cane sugar in a market where consumers spend over \$1 billion a year on organic sugar, virtually all imported. Mississippi (28 operations) has

some of the nation's best soils and climate for organic sweet potatoes, and Alabama (38 operations on 869 acres) is the region's clearest demand-supply mismatch. Puerto Rico (13 certified operations, alongside a far larger informal farming base) brings mountain-grown coffee (historically among the highest-priced U.S.-origin coffee) plus tropical fruit, cacao, and a rebuilding agricultural economy, and the U.S. Virgin Islands (a single certified operation today) is building farm-to-resort supply in a territory that imports roughly 80% of its food (state profiles; USDA NASS, 2024).

The common thread across all nine is that the Southeast's season and its singular crops are structural advantages no other region can copy, while the binding constraints (heat, humidity, storms, and thin infrastructure) are management and investment problems rather than market problems.

WHERE THE OPPORTUNITY CONCENTRATES

Winter produce is the flagship. From November through April, Florida (with south Georgia and coastal South Carolina extending the window) is the eastern United States' domestic answer to imported organic leafy greens, tomatoes, peppers, and cucumbers, with organic premiums that can exceed 40% above conventional. Leafy greens deserve particular emphasis. The national leafy-greens market is worth tens of billions of dollars, roughly ten times the size of the blueberry or strawberry market, and Florida growers already supply it at meaningful scale alongside a substantial organic bell pepper sector. Culinary herbs follow the same logic and are bread-and-butter crops for many organic market farms. Market windows matter as much as volume. Timing harvests to land ahead of overlapping supply from other regions, as Georgia blueberries already do, protects the premium. As Western drought pressures California supply, the Southeast's winter position strengthens further.

Berries are the second flagship. Georgia and Florida organic blueberries command premiums of 50% or more and hit the market weeks before northern competitors. Florida strawberries face a national import gap directly. Sweet potatoes (Mississippi's signature opportunity, with Louisiana close behind) pair ideal soils with double-digit national sales growth, and organic pecans extend across Georgia, Mississippi, and Louisiana into premium nut and confectionery markets.

The region's singular crops form the third tier. Louisiana organic cane sugar has no domestic competitor, Puerto Rican organic coffee and emerging cacao carry protected-origin identity, South Carolina offers American-grown tea and Carolina Gold heritage grains, and Puerto Rico and the Virgin Islands add tropical fruit. Organic peanuts and organic rice round out the portfolio. Georgia, Florida, and Alabama sit in the heart of U.S. peanut country, and Louisiana's rice base gives the region a domestic organic rice option few others can match. Finally, the region's tourism economies (Charleston, New Orleans, Nashville-adjacent markets, and the Caribbean resorts) create farm-to-restaurant and farm-to-resort channels that pay the premiums organic transition requires.

THE IMPORT GAP AND THE ONSHORE OPPORTUNITY

The national section of this toolkit documents an organic market that is import-dependent in exactly the categories where the Southeast can produce. Blueberries (3.3% of import value) and strawberries (2.4%) were both among the largest tracked organic imports of 2025, and both are Southeast strengths, from Georgia's early-window blueberries to Florida's winter strawberries. Winter vegetables and fresh tomatoes are imported heavily in exactly the months Florida grows at scale (OTA, 2026; USDA ERS, 2025).

The singular crops sharpen the point. Virtually all of the more than \$1 billion Americans spend annually on organic sugar is imported (and Louisiana is the only domestic option. Nearly all U.S. coffee is imported) and Puerto Rico is one of only two U.S. coffee origins. None of these gaps requires a crop the Southeast cannot grow. Each is a question of transition support, climate-risk management, and processing capacity. That makes Southeast onshoring a concrete, near-term proposition: the region already has the season, the land, and in several categories the only domestic supply position in the country.

BARRIERS AND WHAT RESOLVES THEM

The constraints in the Southeast are climatic and infrastructural rather than market-driven. Subtropical heat and humidity create pest and disease pressure that demands intensive organic management, often without well-established regional protocols, the gap that UF/IFAS, Clemson, Auburn, Mississippi State, and NC State research programs and Southeast TOPP's paid mentorship are working to close. Hurricane and tropical storm risk, most severe in Florida, Louisiana, Puerto Rico, and the Virgin Islands, argues for resilient infrastructure, diversified plantings, and crop insurance planning. Organic certifiers, processing, cold storage, and aggregation remain thin across much of the region, constraining producers beyond direct-market channels, which is what regional food hubs, farm-to-institution programs, and state investment can resolve. Citrus greening remains organic citrus's central challenge, met with HLB-tolerant rootstock and improved organic management. The region's farmer institutions (the Carolina Farm Stewardship Association, Georgia Organics, Florida Organic Growers, SSAWG, and the extension networks profiled in the state sheets) are the connective tissue turning these constraints into transition pathways.

WHAT THE SOUTHEAST LANDSCAPE MEANS FOR GROWERS

The Southeast's advantage is its season and its singularity: the only winter-scale production region in the eastern U.S., and the only domestic source of several premium crops. Four themes carry forward into the state profiles, the buyer-landscape companion, and individual transition decisions:

- The winter window is the strategic asset. From November through April the Southeast is the eastern U.S. domestic supply of organic vegetables and berries, against import competition and tightening Western supply.
- Singular crops carry no domestic competition. Organic cane sugar, Puerto Rican coffee, American-grown tea, heritage grains, and tropical fruit are positions no other region can enter.
- Import replacement opportunities are substantial. Blueberries, strawberries, winter vegetables, sugar, and coffee are all import-exposed categories the region can realistically supply, keeping value in the region.
- The binding constraints are climate risk and infrastructure, not demand. Heat, storms, and thin processing yield to research-backed protocols, TOPP mentorship, food-hub investment, and the affordable-land openings profiled in the state sheets.

The nine state and territory profiles in Appendix A translate this regional picture into state-specific data, opportunities, barriers, and the farmer-support resources available in each state. Read together with the national and buyer-landscape companions, they are meant to help a Southeast grower move from "organic demand is growing" to "here is where my operation can fit into the overall picture."

SOURCES

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NATIONAL TOOLKIT
THE U.S. ORGANIC MARKET

MIDWEST

ADVANCING REGIONAL ORGANIC MARKETS
2026 EDITION

MIDWEST OVERVIEW

This paper is the Midwest regional overview in A Farmer's Toolkit, covering the eleven state profiles included in this toolkit's appendix: Arkansas, Illinois, Indiana, Iowa, Kentucky, Michigan, Minnesota, Missouri, Ohio, Tennessee, and Wisconsin. The Midwest TOPP region as profiled here reaches beyond the traditional Corn Belt to include the upper South, where the tobacco transition has created one of the country's most motivated pools of organic-ready farmers. Where the national companion establishes the size and shape of the organic opportunity, this document sets the regional context, and the state profiles in Appendix A carry the detail, with state-by-state data, opportunities and barriers, and the specific certification, technical-assistance, and market-access resources available to farmers in each state.

THE MIDWEST ORGANIC MARKET

The U.S. organic market reached a new high of \$76.6 billion in 2025, up 6.8%, roughly twice the growth of the total marketplace, with organic food growing three times as fast as total food (OTA, 2026). The Midwest is where the biggest structural question in that market will be answered: the United States imports 75-80% of its organic soybeans while the Midwest grows more conventional corn and soy than anywhere on earth. Across the eleven states, more than 8,300 certified organic operations work nearly 1.3 million certified acres, and the region holds three of the nation's top-ten states for certified operations, with Wisconsin 4th at 1,617, Indiana 7th at 1,028, and Ohio 8th at 1,008, alongside the organizational infrastructure, from MOSES to Practical Farmers of Iowa, that makes it the operational heart of American organic agriculture (state profiles; USDA NASS, 2024).

Demand inside the region is deep. Chicago is one of the top five organic food markets in the United States, yet Illinois farms produce less than 5% of the organic food consumed there. The Twin Cities, Detroit, Columbus, Cleveland, Cincinnati, Indianapolis, Kansas City, St. Louis, and Nashville each anchor strong co-op, CSA, and institutional demand. The disconnect between what the region's consumers buy and what its farms currently supply is the region's central opportunity.

THE ELEVEN STATES

Each state carries its own profile in Appendix A. The regional pattern they form is worth setting out first.

Wisconsin is the dairy anchor and the organizational center. Ranking 4th nationally with 1,617 certified operations and 241,080 certified acres, it holds an unmatched concentration of organic dairy farms and hosts the MOSES Organic Farming Conference in La Crosse, which draws over 3,500 attendees and ranks as the largest organic farming gathering in the United States. Ohio (1,008 operations, 8th nationally) pairs the Midwest's other great dairy cluster (Amish and plain community farms that adopted organic certification early and deeply) with leading organic egg production. Minnesota (852 operations, 217,315 acres, \$16.5 million in OREI/ORG funding) sits at the crossroads of organic dairy demand and the feed-grain shortage, with half its certified farms already managing split organic-conventional operations, one of the Midwest's largest ready-to-transition pools. Michigan is the region's specialty-crop giant: 785 certified operations across 159,396 certified acres, with the nation's densest organic tree fruit and blueberry belt along the Lake Michigan shore plus dairy and Detroit's Eastern Market (state profiles; USDA NASS, 2024).

The grain belt states are where the national feed gap will be closed or not. Iowa (907 operations, 197,192 acres, 9th nationally) is the single most important state for organic grain transition in the country: the nation's largest conventional soybean state, exporting conventional soy while the U.S. imports organic soy. Illinois (843 operations, 149,243 acres) pairs 26 million conventional corn-soy acres with Chicago's 9.5 million consumers. Indiana (1,028 operations, 97,292 acres, 7th nationally) and Missouri (684 operations, 64,824 acres) extend the same grain-plus-livestock pattern, Missouri adding Ozark grass-fed beef and two food-forward metro markets.

The upper South brings a different asset: experienced small-farm operators searching for their next high-value crop. Kentucky (251 operations, 19,435 acres) lost over 90% of its tobacco acreage after the 2004 federal buyout, leaving thousands of farmers whose high-value, small-acreage, intensive-management skills map directly onto organic vegetables, herbs, and grains. Tennessee (119 operations) shares the tobacco-exit story and adds Nashville, one of the fastest-growing premium food markets in the South. Arkansas (220 operations, with \$48 million in organic animal sales ranking 8th nationally) anchors the region's organic poultry and egg sector on integrator infrastructure, and its feed demand points straight back at the grain belt (state profiles; USDA NASS, 2024).

The common thread across all eleven states is integration: the region's dairy, poultry, and egg sectors need exactly the organic corn, soy, and small grains its crop farmers could grow, and the largest organic consumer markets between the coasts sit in the middle of it all.

WHERE THE OPPORTUNITY CONCENTRATES

Feed grain is the center of gravity. Organic corn, soybeans, and oats anchor every other organic livestock enterprise in the region (Wisconsin and Minnesota dairy, Ohio and Missouri eggs, Arkansas and Indiana poultry) and domestic supply falls far short. Transitioning even a fraction of the Corn Belt's conventional acres would rebalance the national organic feed market. The agronomics are proven, and the premiums are persistent.

Organic dairy is the established backbone. Wisconsin's Coulee Region, Ohio's plain community clusters, Minnesota's cooperative networks, northern Indiana, and Michigan's Lower Peninsula together form the country's densest organic dairy landscape. Its growth is gated less by demand than by feed costs and processor capacity, both of which point back to regional grain.

Specialty and high-value crops form the third tier. Michigan's organic blueberries and tree fruit lead the nation, Wisconsin adds organic ginseng and berries, and Kentucky and Tennessee bring vegetables and herbs on former tobacco ground. Perennial tree crops and agroforestry systems are also being adopted at meaningful scale across the northern Midwest, and helping those plantings reach certified organic status is an emerging opportunity. Missouri and Illinois supply metro farmers' markets, co-ops, and institutions, and reviving local organic purchasing by schools and food banks would widen that channel further. Poultry and eggs (among the fastest-growing organic categories nationally, with organic eggs up 22.4% in 2025) leverage the region's existing processing infrastructure and complete the loop with local feed demand (OTA, 2026).

THE IMPORT GAP AND THE ONSHORE OPPORTUNITY

The national section of this toolkit documents an organic market that is import-dependent in exactly the categories the Midwest is built to produce. Processed soybeans remained among the top-ten tracked organic imports of 2025, and the U.S. imports 75-80% of its organic soybeans overall, the central paradox of American organic agriculture, since the region's farms grow more conventional soy than anywhere in the world (OTA, 2026; state profiles). Organic feed-grain imports have tripled to quadrupled in recent years even as Iowa alone farms roughly 10 million conventional soybean acres. Transitioning a fraction of them would eliminate the import gap entirely.

Blueberries (among the largest tracked organic imports of 2025 at 3.3% of import value) map directly onto Michigan's national leadership in organic blueberry production, where the Lake Michigan fruit belt can expand against imported supply. None of these gaps requires a crop the Midwest cannot grow. Each is a question of transition financing, drift protection, aggregation, and processing. That makes Midwest onshoring the highest-leverage organic opportunity in the country: nowhere else does so much convertible acreage sit so close to so much unmet demand.

BARRIERS AND WHAT RESOLVES THEM

The constraints in the Midwest are economic and structural rather than agronomic. GMO pollen and herbicide drift from dense conventional acres threaten organic certification during transition, arguing for buffer planning, drift insurance, and the field-level guidance that extension programs and TOPP mentors provide. High cash rents driven by conventional commodity prices compress transition economics, and the three-year transition period creates an income gap that requires bridge financing, EQIP Organic Initiative cost-share, and TOPP's paid mentorship to cross. Organic grain aggregation and elevator infrastructure remain thin outside established cooperative channels, and organic dairy processor consolidation has produced farmgate price volatility in Wisconsin, Ohio, and Michigan. Certification cost share has not kept pace either. The federal reimbursement cap of \$750 per certification scope covers a shrinking share of rising fees, and stronger cost share, better-trained NRCS technical service providers, and more transparent EQIP delivery would remove real friction for transitioning farmers. Certified organic meat processing and food-grade grain milling also remain thin relative to the region's livestock and grain base, and buyers consistently say they prefer to source from organized farmer cooperatives, which strengthens the case for cooperative and shared-infrastructure models. The region's response infrastructure is the strongest in the country: Practical Farmers of Iowa's farmer-led research, MOSES's education network, OEFFA, the Land Stewardship Project, Michigan's MOFFA, and Midwest TOPP's mentor matching together form a support system purpose-built to move split-operation and transitioning farmers to full certification.

WHAT THE MIDWEST LANDSCAPE MEANS FOR GROWERS

The Midwest's advantage is the combination of productive capacity, established organic institutions, and deep interior demand. Four themes carry forward into the state profiles, the buyer-landscape companion, and individual transition decisions:

- Feed grain is the center of gravity. Organic corn, soy, and oats anchor the region's dairy, egg, and poultry sectors, and domestic supply falls far short of demand, the clearest and largest opportunity in the region.
- Demand is deep and local. Chicago is a top-five U.S. organic market supplied almost entirely from elsewhere, and the Twin Cities, Detroit, Columbus, Nashville, and both Missouri metros add layers of unmet local demand.
- Import replacement opportunities are substantial. Processed soy (75-80% of it imported) and blueberries are both top-ten organic imports the region can realistically displace.
- The binding constraints are transition economics, not agronomy. Cash rents, GMO drift risk, and the three-year income gap yield to TOPP mentorship, EQIP cost-share, bridge financing, and the strongest organic farmer networks in the country.

The eleven state profiles in Appendix A translate this regional picture into state-specific data, opportunities, barriers, and the farmer-support resources available in each state. Read together with the national and buyer-landscape companions, they are meant to help a Midwest grower move from "organic demand is growing" to "here is where my operation can fit into the overall picture."

SOURCES

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NATIONAL TOOLKIT
THE U.S. ORGANIC MARKET

CENTRAL PLAINS

ADVANCING REGIONAL ORGANIC MARKETS
2026 EDITION

CENTRAL PLAINS OVERVIEW

This paper is the Central Plains regional overview in A Farmer's Toolkit, covering the six state profiles included in this toolkit's appendix: Colorado, Kansas, Nebraska, North Dakota, Oklahoma, and South Dakota. (Central Plains TOPP also serves Wyoming, which is profiled in the Northwest companion.) Where the national companion establishes the size and shape of the organic opportunity, this document sets the regional context, and the state profiles in Appendix A carry the detail, with state-by-state data, opportunities and barriers, and the specific certification, technical-assistance, and market-access resources available to farmers in each state.

THE CENTRAL PLAINS ORGANIC MARKET

The U.S. organic market reached a new high of \$76.6 billion in 2025, up 6.8%, roughly twice the growth of the total marketplace, with organic food growing three times as fast as total food (OTA, 2026). The Central Plains is, in many ways, the mirror image of the coastal organic regions: what distinguishes it is not density of consumers but sheer productive scale. Across the six states, roughly 1,400 certified organic operations work nearly 1 million certified acres, anchored by Nebraska's and Colorado's 250,000-plus-acre certified land bases and a grain, oilseed, and rangeland endowment that no other region can match (state profiles; USDA NASS, 2024).

Consumer demand inside the region is real but concentrated. The Denver-Boulder corridor has one of the highest concentrations of organic food consumers per capita in the country, yet less than 5% of Colorado farmland is certified organic, a supply gap local producers can fill. Omaha, Lincoln, Oklahoma City, and Tulsa anchor growing direct-market and co-op scenes. But the region's defining market relationship is with the rest of the country: Central Plains organic wheat, sunflowers, corn, soybeans, and beef supply national flour mills, feed mills, natural-food ingredient makers, and premium meat buyers far beyond its borders.

THE SIX STATES

Each state carries its own profile in Appendix A. The regional pattern they form is worth setting out first.

North Dakota is a foundational organic grain state. Its 155 certified operations farm 147,455 certified acres at some of the largest per-farm scales in the country, and it remains the nation's top organic sunflower producer, a major supplier of organic hard red and durum wheat, and a significant grower of organic flaxseed, all supported by well-organized farmer co-ops and the Northern Plains Sustainable Agriculture Society, the state's leading organic farmer network (state profile; USDA NASS, 2024).

Nebraska pairs Corn Belt grain with the Sandhills. Its 356 certified operations work 261,210 certified acres (22nd nationally), with organic corn and soy in the east and a 20,000-square-mile expanse of ecologically intact native grassland (one of the most naturally organic-ready rangelands in North America) supporting certified grass-fed beef. South Dakota (104 operations, 148,228 acres) sits at the same junction of Corn Belt grain and Great Plains rangeland, with substantial organic wheat, corn, sunflower, and soybean acreage in the east and low-input native grassland in the west.

Colorado is the region's demand anchor. Its 522 operations and 254,288 certified acres bridge Front Range vegetable and specialty farms serving Denver and Boulder with Eastern Plains dryland grain and organic beef, backed by \$8.2 million in OREI/ORG research funding and Colorado State University's statewide extension network. Kansas (190 operations, 95,856 acres) is the wheat belt's organic transition opportunity: organic hard red winter wheat commands premiums of 100% or more over conventional, roughly \$12-14 per bushel versus \$6-7, meaning a dryland farmer transitioning 500 acres could double gross revenue per acre. Oklahoma (86 operations, 36,066 acres) rounds out the

region with organic winter wheat, an emerging grass-fed beef sector built on its vast cattle heritage, pecans, and growing urban markets in Oklahoma City and Tulsa (state profiles; USDA NASS, 2024).

The common thread across all six states is that the region's organic economics rest on scale and premiums rather than proximity: large-acre grain and rangeland operations selling into national supply chains, with the three-year transition period and distance to processing as the recurring hurdles.

WHERE THE OPPORTUNITY CONCENTRATES

Food-grade organic grain is the flagship. Organic hard red winter wheat from Kansas and Oklahoma, hard red and durum from North Dakota, and winter wheat from western Nebraska and South Dakota supply a national organic milling and baking market that consistently pays substantial premiums. The agronomics translate naturally: the region's wheat heritage, dryland rotations, and soil-health practices align closely with certified organic systems.

Oilseeds and specialty rotation crops form a second tier with unusually strong economics. North Dakota grows more certified organic sunflowers than any other state, supplying oil, snack-seed, and ingredient markets, and its organic flaxseed feeds growing omega-3 and functional-food demand. South Dakota's sunflower acreage extends the same opportunity. These crops fit dryland rotations, spread weather risk, and sell into reliably premium markets.

Feed grains (corn and soybeans) are the region's contribution to the national organic bottleneck. Eastern Nebraska, eastern South Dakota, eastern Kansas, and the Red River Valley grow organic corn and soy that regional and national feed mills need badly, and expanding that acreage is the clearest path to reducing the import dependence documented in the national companion. Finally, certified organic and grass-fed beef is the region's sleeping asset: the Sandhills, the western Dakotas' Badlands rangeland, Oklahoma's native prairie, and Colorado's mountain and plains pastures carry historically low chemical inputs, meaning organic transition on rangeland is far less complex than on cropland, while national demand for organic grass-fed beef grows at double-digit rates.

THE IMPORT GAP AND THE ONSHORE OPPORTUNITY

The national section of this toolkit documents an organic market that is import-dependent in exactly the categories where the Central Plains can produce. Processed soybeans remained among the top-ten tracked organic imports of 2025, and imports of organic feed grains have tripled to quadrupled in recent years, a direct signal of unmet demand from organic dairy, egg, and meat producers who need certified feed (OTA, 2026; USDA ERS, 2025). The Central Plains holds some of the country's best-positioned acreage to close that gap: conventional corn, soy, and wheat ground with the scale, equipment, and rotation experience to convert.

The same logic extends to food-grade grain and oilseeds, where imported organic wheat, oats, and sunflower products compete with commodities the region already grows at national-leadership scale. None of these gaps requires a crop the Central Plains cannot grow. Each is a question of transition financing, aggregation, and processing capacity. That makes Central Plains onshoring a concrete, near-term proposition: the region already has the land, the growers, and the agronomic tradition to convert imports into domestic production.

BARRIERS AND WHAT RESOLVES THEM

The constraints in the Central Plains are less about demand than about weather, distance, and infrastructure. Extreme weather variability (drought, hail, late freezes, and wind erosion) creates yield risk that lands hardest during the three-year transition period, which argues for transition cost-share, crop insurance literacy, and the paid mentorship that Central Plains TOPP provides. Remote geography and thin organic processing infrastructure mean much of the region's organic grain leaves as raw commodity: state agricultural-development grants, cooperative grain marketing through organizations like Rocky Mountain Farmers Union, and investment in organic elevators, mills, and oilseed processing would keep more value in the region. Buyers also consistently prefer to source from organized farmer cooperatives, which strengthens the case for shared marketing and shared infrastructure. Conventional commodity infrastructure and

high cash rents create economic inertia against transition, which is precisely the problem that TOPP mentor matching, EQIP Organic Initiative cost-share, and the farmer networks profiled in the state sheets (NPSAS, the Kansas Rural Center, the South Dakota Organic Alliance, and the Nebraska Sustainable Agriculture Society) exist to solve.

WHAT THE CENTRAL PLAINS LANDSCAPE MEANS FOR GROWERS

The Central Plains' advantage is scale: nearly 1 million certified acres, national-leadership positions in organic wheat, sunflowers, and rangeland, and an agronomic tradition that transfers naturally to organic systems. Four themes carry forward into the state profiles, the buyer-landscape companion, and individual transition decisions:

- Scale is the asset. The region's large-acre grain farms and vast low-input rangelands, averaging some of the biggest per-operation footprints in the country, are among the most naturally positioned land bases for organic transition, and premiums of 100% or more on organic wheat make the economics compelling.
- The opportunity is in grain, oilseeds, and beef. Food-grade wheat, sunflowers and flax, feed-grade corn and soy, and certified grass-fed beef are the categories where the region's endowment meets national demand.
- Import replacement opportunities are substantial. Processed soy and feed grains are among the largest tracked organic imports, and the Central Plains has the best-positioned conventional acreage in the country to close that gap.
- The binding constraints are weather, distance, and infrastructure, not demand. They yield to TOPP mentorship, EQIP cost-share, cooperative aggregation, and processing investment, the resources profiled in the state sheets.

The six state profiles in Appendix A translate this regional picture into state-specific data, opportunities, barriers, and the farmer-support resources available in each state. Read together with the national and buyer-landscape companions, they are meant to help a Central Plains grower move from "organic demand is growing" to "here is where my operation can fit into the overall picture."

SOURCES

A note on sources: National market figures come from the Organic Trade Association's 2026 Organic Market Report, which reports calendar-year 2025 consumer sales. State-level figures, including certified operations, acreage, commodities, funding, and sales, are drawn from the toolkit's six Central Plains state profiles, which draw certified operations counts, and acreage where certifier reporting is complete, from current USDA Organic Integrity Database listings, and compile remaining acreage, commodity, funding, and sales detail from OTA state data and USDA's 2021 Certified Organic Survey and 2022 Census of Agriculture. Sources are cited inline in short form and listed in full at the end.

Organic Trade Association. 2026 Organic Market Report (calendar-year 2025 consumer sales; U.S. organic sales reached \$76.6 billion, +6.8%; named top-ten organic imports include blueberries and strawberries). <https://ota.com/OrganicMarketReport>

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WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

NATIONAL TOOLKIT
THE U.S. ORGANIC MARKET

SOUTHWEST

ADVANCING REGIONAL ORGANIC MARKETS
2026 EDITION



SOUTHWEST OVERVIEW

This paper is the Southwest regional overview in A Farmer's Toolkit, covering the two state profiles included in this toolkit's appendix: Texas and New Mexico. Where the national companion establishes the size and shape of the organic opportunity, this document sets the regional context, and the state profiles in Appendix A carry the detail, with state-by-state data, opportunities and barriers, and the specific certification, technical-assistance, and market-access resources available to farmers in each state.

THE SOUTHWEST ORGANIC MARKET

The U.S. organic market reached a new high of \$76.6 billion in 2025, up 6.8%, roughly twice the growth of the total marketplace, with organic food growing three times as fast as total food (OTA, 2026). The Southwest is compact but concentrated, a two-state corridor built on depth rather than geographic breadth. The Texas-New Mexico corridor anchors national organic dairy, beef, and fiber supply, and its influence on U.S. organic markets far outweighs its footprint. Across the two profiles, roughly 1,173 certified organic operations work about 609,000 certified acres (state profiles; USDA NASS, 2024).

The corridor's national leadership positions are striking. Texas ranks first in the nation in organic milk, with roughly \$320 million in farmgate sales, ranks fourth in organic crops at \$179 million, and produces more certified organic cotton than any other state. New Mexico ranks eighth in organic milk at \$66 million. Concentrated dairy and feed hubs around Hereford, Texas and Clovis, New Mexico tie the corridor's supply chains together, and both states share arid rangeland and irrigation-dependent systems that reward drought-adapted production.

THE TWO PROFILES

Each profile carries its own detail in Appendix A. The regional pattern is worth setting out first.

Texas is the organic powerhouse of the South. Ranking 6th nationally with 1,071 certified operations and 568,678 certified acres, its organic sector spans High Plains cotton and grain, Rio Grande Valley and Hill Country produce, rangeland beef, and pecans, with pasture-based organic dairies leading the nation in organic milk. Nearly half of Texas organic farms run split operations, balancing organic and conventional acres to manage risk, and the state's exceptional metro demand supports direct-market and processing growth along the I-35 corridor (state profile; USDA NASS, 2024).

New Mexico is the corridor's innovation partner: lean, arid-adapted, and deeply place-based. Its 102 certified operations farm 40,721 certified acres, spanning the dairy and forage corridor around Clovis and Portales, rangeland beef on historically low-input grasslands, Rio Grande pecans, and the Hatch Valley's terroir-protected chile, a crop whose distinct flavor profile cannot be authentically replicated elsewhere. Culturally rooted acequia-irrigated farms near Albuquerque and Taos are reviving traditional systems under organic certification, preserving agricultural heritage while accessing premium markets (state profile; USDA NASS, 2024).

The common thread across both profiles is high-value production under water constraint. Each pairs a premium position (milk, cotton, chile) with drought and allocation risk as a first-listed barrier.

WHERE THE OPPORTUNITY CONCENTRATES

Dairy, livestock, and the feed that supports them are the flagship. Texas dairies lead the nation in organic milk and New Mexico's Clovis-Portales corridor anchors a high-value regional milk market, yet both depend on organic feed that is chronically undersupplied. Expanding organic corn, milo, sorghum, alfalfa, and hay across the corridor, and pairing that

acreage with regenerative grazing and mid-scale processing near Hereford and Clovis, is the region's clearest path to feed self-sufficiency and stable margins.

Fiber and identity crops form the second tier. West Texas holds the nation's strongest organic cotton acreage base, and demand from apparel and personal-care brands committed to verified domestic fiber keeps growing, but ginning, processing, and marketing capacity lag the acreage. Certified organic Hatch chile and value-added sauces carry strong export and retail recognition, and organic peanuts round out the broadacre tier: organic peanut butter and snack markets are growing more than 10% annually, and Central Texas and Panhandle acreage with organic shelling capacity can meet that demand.

The third tier is staples and dryland innovation. Drought-tolerant rotations of sorghum, millet, and arid-adapted legumes such as chickpeas and lentils build soil, fix nitrogen, and de-risk transition in water-limited systems. Regional organic wheat and barley link producers to artisan milling and brewing markets across both profiles, and organic pecans supply premium nut and confectionery buyers from Texas and New Mexico orchards.

THE IMPORT GAP AND THE ONSHORE OPPORTUNITY

The national section of this toolkit documents an organic market that is import-dependent in exactly the categories where the Southwest can produce. Organic cotton is the sharpest case: roughly 99% of U.S. organic cotton consumption is imported, largely from South Asia and Turkey, while Texas leads domestic production. Organic feed grains, whose imports have tripled to quadrupled in recent years and which include processed soybeans among 2025's top-ten tracked organic imports, are a call on the corridor's alfalfa, corn, and hay base (OTA, 2026; USDA ERS, 2025).

The same pattern extends to dry beans and grains, currently sourced from the Midwest or Latin America but well suited to arid-region varieties adapted to Texas and New Mexico, and to imported chile competing with heritage varieties grown in the borderlands under a name buyers already recognize. None of these gaps requires a crop the region cannot grow. Each is a question of water-smart production, processing infrastructure, and transition support. That makes Southwest onshoring a concrete, near-term proposition anchored in the region's existing leadership.

BARRIERS AND WHAT RESOLVES THEM

The constraints in the Southwest are led by water. Drought and scarcity create production risk for every irrigated system in the region, from the Texas High Plains to the Rio Grande, and that risk lands hardest during the three-year transition period. The response is organic dryland technique, efficient irrigation technology, and drought-adapted rotations, backed by the arid-region research programs at Texas A&M AgriLife and New Mexico State University. Land access yields to lease-to-own and cooperative land models across the corridor. Infrastructure gaps (cotton ginning, grain cleaning and storage, and mid-scale dairy processing) are investment problems that state agricultural-development programs and regional value-chain projects can solve, keeping organic value in the region. The support network is established: the Texas Organic Farmers and Gardeners Association, the New Mexico Farmers' Marketing Association, and Southwest TOPP's paid mentor matching, with EQIP Organic Initiative cost-share available through NRCS in both states.

WHAT THE SOUTHWEST LANDSCAPE MEANS FOR GROWERS

The Southwest's advantage is scale with specialization: national leadership in organic dairy and fiber, a strategic feed corridor, and identity crops such as Hatch chile. Four themes carry forward into the profiles, the buyer-landscape companion, and individual transition decisions:

- The region is a national anchor for organic dairy, beef, and fiber. Texas leads the nation in organic milk and cotton, and New Mexico ranks in the top ten for organic milk.

- The opportunity is in feed self-sufficiency, fiber processing, and identity crops. Organic feed and forage, cotton ginning and textile links, peanuts, pecans, and certified Hatch chile are the categories where regional endowment meets national demand.
- Import replacement opportunities are substantial. Organic cotton (roughly 99% imported), feed grains, dry beans, and imported chile are all categories the region can realistically displace with high-integrity domestic supply.
- Water is the binding constraint, not demand. It yields to dryland innovation, efficient irrigation, drought-adapted rotations, and the research, cooperative, and TOPP mentorship resources profiled in the state sheets.

The two state profiles in Appendix A translate this regional picture into state-specific data, opportunities, barriers, and the farmer-support resources available in each state. Read together with the national and buyer-landscape companions, they are meant to help a Southwest grower move from “organic demand is growing” to “here is where my operation can fit into the overall picture.”

SOURCES

A note on sources: National market figures come from the Organic Trade Association’s 2026 Organic Market Report, which reports calendar-year 2025 consumer sales. State-level figures, including certified operations, acreage, commodities, funding, and sales, are drawn from the toolkit’s two Southwest profiles, which draw certified operations counts, and acreage where certifier reporting is complete, from current USDA Organic Integrity Database listings, and compile remaining acreage, commodity, funding, and sales detail from OTA state data and USDA’s 2021 Certified Organic Survey and 2022 Census of Agriculture. Sources are cited inline in short form and listed in full at the end.

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WEST/SOUTHWEST TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

**NATIONAL TOOLKIT
THE U.S. ORGANIC MARKET**

WEST

**ADVANCING REGIONAL ORGANIC MARKETS
2026 EDITION**



WEST OVERVIEW

This paper is the West regional overview in A Farmer's Toolkit, covering the five state profiles included in this toolkit's appendix: Arizona, California, Hawaii, Nevada, and Utah. Where the national companion establishes the size and shape of the organic opportunity, this document sets the regional context, and the state profiles in Appendix A carry the detail, with state-by-state data, opportunities and barriers, and the specific certification, technical-assistance, and market-access resources available to farmers in each state.

THE WEST ORGANIC MARKET

The U.S. organic market reached a new high of \$76.6 billion in 2025, up 6.8%, roughly twice the growth of the total marketplace, with organic food growing three times as fast as total food (OTA, 2026). The West holds the country's largest organic consumer markets beside some of its most valuable organic farmland, and it is the only region in this toolkit anchored by the nation's top organic state. Los Angeles is the largest organic food retail market in the United States by sales volume, and California's avocado, citrus, wine grape, and rice acreage spans a landscape big enough to run from the Sacramento Valley to the Imperial Valley, all of it serving the same premium demand base. Across the five profiles, roughly 6,200 certified organic operations work about 2.5 million certified acres, from the Yuma winter-vegetable corridor to Hawaii's tropical farms (state profiles; USDA NASS, 2024).

The demand side is commanding. Los Angeles anchors the nation's largest organic retail market, 90% of California, Arizona, and Hawaii households buy organic, and Las Vegas's 40 million annual visitors make it the single largest concentration of restaurant and hospitality food purchasing in the country. What binds the region's production side together is a single shared constraint, water, and a shared strategy of high-value specialization, climate-adapted systems, and controlled-environment innovation.

THE FIVE PROFILES

Each profile carries its own detail in Appendix A. The regional pattern is worth setting out first.

California is the center of gravity, and by a wide margin. Its 5,465 certified organic operations rank first in the nation, working roughly 1.84 million certified acres across a state large enough to hold multiple production systems at once. The Sacramento Valley grows organic rice, wheat, and almonds for national food makers, Napa, Sonoma, and Mendocino anchor the country's organic wine industry, San Diego and Ventura Counties lead in organic avocados and citrus, and the Coachella and Imperial Valleys supply organic winter vegetables at national scale alongside Arizona's Yuma corridor. Los Angeles and the Bay Area give California growers two of the nation's largest organic consumer markets at their doorstep, and California Certified Organic Farmers (CCOF), founded in Santa Cruz County in 1973, remains the organization whose voluntary standards became the model for the USDA National Organic Program. Urban encroachment on coastal farmland is an ongoing threat that makes preservation and high-value production strategies essential (state profile; USDA NASS, 2024).

Arizona is the nation's winter salad bowl. Its 313 certified operations on 37,482 acres punch far above their count: Yuma County supplies the majority of U.S. leafy greens from November through April, and Arizona organic farms hire 738% more workers than conventional operations, the highest labor intensity in the country. The Sun Produce Cooperative and Indigenous, Sonoran-adapted growing traditions extend the state's organic base beyond the Yuma corridor (state profile; USDA NASS, 2024).

Hawaii is the region's tropical singularity. Its 104 certified operations grow the only commercial coffee in the United States (organic Kona ranks among the highest per-pound revenue crops in American agriculture) alongside macadamia nuts, tropical fruit, and culturally significant canoe crops such as taro, breadfruit, and coconut, even as the state imports

85-90% of its food. Nevada (125 operations, 411,523 acres, 5th nationally in certified acreage) pairs Great Basin rangeland beef and irrigated organic alfalfa supplying Western dairies with the singular advantage of Las Vegas hospitality demand next door. Utah (196 operations, 137,922 acres) rounds out the region with low-input rangeland beef, heritage grains, irrigated forage, and a pioneer stewardship tradition that maps naturally onto organic practice (state profiles; USDA NASS, 2024). The common thread across all five profiles is high-value specialization under water constraint. Nearly every profile pairs a premium position (winter greens, avocados, coffee, forage) with drought and allocation risk as the first-listed barrier.

WHERE THE OPPORTUNITY CONCENTRATES

Fruits and vegetables lead, because the region already leads. California's avocados, citrus, coastal berries, and Central Valley rice and wine grapes anchor national supply, and Arizona's Yuma corridor covers the winter. The clearest near-term growth is in extending both: expanded protected-culture and controlled-environment acreage that hedges water and heat risk while serving retail demand year-round, and inland berry and vegetable production that diversifies supply and labor markets.

Feed and forage form the second tier, and the interior states own it. Nevada and Utah hay, alfalfa, and rotational grains, with room to scale certified rangeland systems, can shorten the feed supply chain for Western dairies that currently draw on the Midwest and Canada. Mid-scale organic dairy processing in Utah and mid-scale poultry clusters in the interior states would keep that value in-region.

Identity and tropical crops form the third tier: organic Kona coffee and macadamias with global brand recognition, canoe crops connecting food security with cultural revitalization, and Hawaiian tropical fruit for premium mainland channels. Around everything sits the region's infrastructure agenda. Composting and circular nutrient systems backed by California and Arizona state policy, cold-chain investment, and the research and extension network running from UC Cooperative Extension to ASU's Swette Center to UH CTAHR make the West the proving ground for climate-adapted organic systems.

THE IMPORT GAP AND THE ONSHORE OPPORTUNITY

The national section of this toolkit documents an organic market that is import-dependent in exactly the categories where the West can produce. Produce is consistently the largest category of organic imports by value, an estimated 35-45% of total organic import spending, much of it from Mexico and South America. This region is the domestic engine of exactly those crops: winter greens from Yuma and the Coachella and Imperial Valleys, strawberries (2.4% of 2025 import value) from the California coast, avocados and citrus from San Diego and Ventura Counties, and organic rice, where Sacramento Valley acreage offers a domestic alternative to imported supply (OTA, 2026; USDA ERS, 2025).

Feed and forage trucked in from outside the region are a second gap the interior states can close, and coffee is the sharpest: nearly all U.S. coffee is imported, while Hawaii is one of only two domestic origins. Expanded controlled-environment and winter production directly displaces imported produce, and Hawaiian tropical fruit can substitute for imported mangoes, papayas, and bananas in premium channels. None of these gaps requires a crop the region cannot grow. Each is a question of water-efficient systems, processing and cold-chain capacity, and transition support. That makes West onshoring a concrete, near-term proposition anchored in categories the region already dominates.

BARRIERS AND WHAT RESOLVES THEM

Water is the region's binding constraint. Colorado River allocation cuts and Great Basin drought create production risk for every irrigated system, met by irrigation-efficiency investment, dryland and drought-adapted systems, soil-moisture retention, and the controlled-environment production the region is already pioneering. Land cost is the second constraint. Coastal California carries some of the most expensive farmland in the country, and urban encroachment actively erodes the farm base, answered by land trusts, cooperative ownership models, urban and peri-urban farm models, and high-value crop mixes on small acreage. Labor shortages weigh on the region's harvest-intensive crops, arguing for workforce training, housing, and visa programs. Thin mid-tier infrastructure calls for mid-size processing,

storage, and distribution hubs, and rising input costs point to regional composting and cooperative input systems. Hawaii adds island-specific hurdles (shipping costs, certifier access, and invasive-species pressure) met by local input production, group certification, and tropical IPM research. The response network is deep: CCOF's certification and advocacy, UC Cooperative Extension, ASU's Swette Center leading Arizona TOPP, the Hawaii Organic Farmers Association, and Southwest TOPP's mentor matching across the region.

WHAT THE WEST LANDSCAPE MEANS FOR GROWERS

The West's advantage is the pairing of the nation's largest organic markets with its most valuable organic acreage, anchored by the nation's top-ranked organic state. Four themes carry forward into the profiles, the buyer-landscape companion, and individual transition decisions:

- Demand depth is unmatched. Los Angeles is the nation's largest organic retail market, 90% of the region's core-state households buy organic, and Las Vegas is the largest hospitality food buyer in the country.
- The opportunity is in produce, feed and forage, and identity crops. Winter vegetables, avocados, citrus, berries, wine grapes, interior-state hay and grain, and Kona coffee and canoe crops form the regional portfolio.
- Import replacement opportunities are substantial. Produce is the largest organic import category, feed and forage are trucked in from outside the region, coffee has only two domestic origins, and rice has a domestic alternative in the Sacramento Valley, all categories the West can realistically supply.
- Water is the binding constraint, not demand. It yields to irrigation efficiency, controlled-environment and drought-adapted systems, cooperative land and input models, and the certification, research, and TOPP mentorship resources profiled in the state sheets.

The five state profiles in Appendix A translate this regional picture into state-specific data, opportunities, barriers, and the farmer-support resources available in each state. Read together with the national and buyer-landscape companions, they are meant to help a West grower move from "organic demand is growing" to "here is where my operation can fit into the overall picture."

SOURCES

A note on sources: National market figures come from the Organic Trade Association's 2026 Organic Market Report, which reports calendar-year 2025 consumer sales. State-level figures, including certified operations, acreage, commodities, funding, and sales, are drawn from the toolkit's five West profiles, which draw certified operations counts, and acreage where certifier reporting is complete, from current USDA Organic Integrity Database listings, and compile remaining acreage, commodity, funding, and sales detail from OTA state data and USDA's 2021 Certified Organic Survey and 2022 Census of Agriculture. Sources are cited inline in short form and listed in full at the end.

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NORTHWEST TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

NATIONAL TOOLKIT
THE U.S. ORGANIC MARKET

NORTHWEST

ADVANCING REGIONAL ORGANIC MARKETS
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NORTHWEST OVERVIEW

This paper is the Northwest regional overview in A Farmer's Toolkit, covering the six state profiles included in this toolkit's appendix: Alaska, Idaho, Montana, Oregon, Washington, and Wyoming. Where the national companion establishes the size and shape of the organic opportunity, this document sets the regional context, and the state profiles in Appendix A carry the detail, with state-by-state data, opportunities and barriers, and the specific certification, technical-assistance, and market-access resources available to farmers in each state.

THE NORTHWEST ORGANIC MARKET

The U.S. organic market reached a new high of \$76.6 billion in 2025, up 6.8%, roughly twice the growth of the total marketplace, with organic food growing three times as fast as total food (OTA, 2026). The Northwest holds two of the nation's premier organic states and one of its great organic grain belts in a single region. Across the six states, roughly 2,800 certified organic operations work roughly 1.4 million certified acres, led by Washington (5th nationally with 1,223 certified operations) and Oregon (836 operations across 308,025 acres), with Montana's 462,290 certified acres the region's largest certified land base (state profiles; USDA NASS, 2024).

What distinguishes the region is its dual identity. West of the Cascades, the Willamette, Skagit, and coastal valleys grow some of the highest-value organic specialty crops in the country for Seattle and Portland, two of the nation's strongest organic consumer markets, with 92% of Washington households buying organic. East of the mountains, the Palouse, the Hi-Line, and the Snake River Plain carry organic wheat, pulses, barley, and potatoes at a scale that supplies national and international markets. Alaska adds a third identity entirely: a food-security frontier that imports roughly 95% of its food and grows record-setting produce under 24-hour summer daylight.

THE SIX STATES

Each state carries its own profile in Appendix A. The regional pattern they form is worth setting out first.

Washington is the flagship. Ranking 5th nationally with 1,223 certified operations and 109,802 certified acres, it anchors national organic apple retail from the Yakima Valley and Wenatchee, grows the majority of U.S. organic hops for a craft-brewing industry worth over \$28 billion, and supplies organic wheat, lentils, and peas from the Palouse, all backed by Washington State University's world-class organic research programs. Oregon (836 operations, 308,025 acres, 12th nationally) is one of the nation's most mature and diverse organic states: Willamette Valley berries, vegetables, and hazelnuts (Oregon grows 99% of U.S. hazelnuts, making it the sole domestic source of organic hazelnuts) plus eastern Oregon grain and rangeland beef, with Oregon Tilth, one of the nation's oldest organic certifiers, headquartered in-state (state profiles; USDA NASS, 2024).

Montana is the grain and pulse giant. Its 305 operations farm 462,290 certified acres, the region's largest certified land base, and its northern plains grow more certified organic lentils and pulse crops than virtually any other state, feeding the fast-growing global market for plant-based organic protein alongside Hi-Line wheat and organic barley. Idaho (352 operations, 381,575 acres) carries a productive paradox: the nation's largest potato state has organic potato acreage under 1% of its total even as organic potatoes command retail prices two to three times conventional, while its organic grain, Treasure Valley vegetables, and specialty seed sectors expand fastest.

Wyoming (79 operations, 141,152 certified acres) is defined by scale and terrain: high-altitude rangeland beef, dryland winter wheat, and the remarkable Jackson Hole premium market, where one of the highest-income resort communities in the country pays exceptional prices for local organic beef and produce. Alaska (14 certified operations on 504 certified acres) is small but strategically vital: with 95% of the state's food imported, every acre of Mat-Su Valley and Kenai Peninsula organic production is a food-security investment as much as a market play (state profiles; USDA NASS, 2024).

The common thread across all six states is category leadership: apples, hops, hazelnuts, lentils, and potatoes are not commodity plays but positions of national and in some cases sole-source supply, and the region's challenge is converting more of its conventional leadership into certified organic supply.

WHERE THE OPPORTUNITY CONCENTRATES

Tree fruit and hops lead. Washington's Yakima and Wenatchee valleys already anchor national organic apple retail, and organic hop demand from craft breweries committed to organic sourcing currently outruns Yakima Valley supply, a conversion opportunity with no meaningful domestic competitor. Oregon's hazelnuts are the same story in a different orchard: surging demand for organic hazelnut spreads, baking ingredients, and plant-based snacks, and only one domestic source.

Grain, pulses, and potatoes form the scale tier. Montana's organic lentils, chickpeas, and dry peas sit at the supply end of the plant-protein boom and fix nitrogen in dryland rotations, lowering transition costs. Palouse and Hi-Line organic wheat supplies national mills, with room for value-added milling and malt in-region. Idaho's potato expertise (agronomy, cold storage, logistics) makes organic potato transition more economically viable there than almost anywhere, against demand that far exceeds domestic supply. Organic specialty seed from southern Idaho rounds out a category where demand consistently outpaces certified supply.

West-side specialty production (Willamette and Skagit valley berries and vegetables, coastal dairy, and direct-market farms serving Portland and Seattle) remains the region's high-revenue core, and Alaska's protected-agriculture opportunity extends the map: greenhouse and high-tunnel production to displace imported produce in a state where nearly everything arrives by barge or air.

THE IMPORT GAP AND THE ONSHORE OPPORTUNITY

The national section of this toolkit documents an organic market that is import-dependent in exactly the categories where the Northwest can produce. Blueberries (among the largest tracked organic imports of 2025 at 3.3% of import value) are a top Oregon organic commodity with room to expand against imported supply. Organic feed grains, whose imports have tripled to quadrupled in recent years, are a direct call on Palouse, Hi-Line, and Snake River Plain acreage, where regional organic dairies and poultry operations currently pay import-driven feed prices (OTA, 2026; USDA ERS, 2025).

The region's sole-source categories sharpen the point: every organic hazelnut not grown in Oregon is imported, and organic hop demand unmet in the Yakima Valley is either unmet entirely or met abroad. None of these gaps requires a crop the Northwest cannot grow. Each is a question of orchard and hop-yard conversion, transition financing, and processing capacity. That makes Northwest onshoring a concrete, near-term proposition built on categories the region already dominates conventionally.

BARRIERS AND WHAT RESOLVES THEM

The constraints in the Northwest vary by geography but share a pattern. West of the mountains, high land values in the Willamette Valley, Yakima Valley, and western Washington limit farmland access for beginning producers, and labor cost and availability squeeze harvest-intensive tree fruit, hop, berry, and vegetable operations, arguing for farmland-access programs, mechanization support, and premium positioning. East of the mountains, remote geography and thin organic processing infrastructure mean much of Montana's and eastern Oregon and Washington's organic grain leaves as raw commodity. Organic flour mills, pulse processors, and malt facilities would capture that value in-region. Idaho's irrigation-dependent systems face water allocation pressure in drought years, and Alaska contends with extreme logistics costs and a 100-130-day season. Across all six states, dryland weather variability lands hardest during the three-year transition, which is what Northwest TOPP's paid mentorship, EQIP Organic Initiative cost-share, and the networks profiled in the state sheets (Oregon Tilth, Tilth Alliance, AERO, and the university extension programs at WSU, OSU, and the University of Idaho) are built to absorb.

WHAT THE NORTHWEST LANDSCAPE MEANS FOR GROWERS

The Northwest's advantage is category leadership on both sides of the mountains: premium specialty valleys facing two of the nation's best organic consumer markets, and national-scale grain and pulse country behind them. Four themes carry forward into the state profiles, the buyer-landscape companion, and individual transition decisions:

- Category leadership is the asset. National organic apple supply, the majority of U.S. organic hops, 99% of hazelnuts, top-tier lentils and pulses, and unmatched potato expertise give Northwest growers positions no other region can replicate.
- The opportunity is in conversion. In apples, hops, hazelnuts, and potatoes, the region already leads conventionally. The near-term play is converting existing acreage and expertise to certified organic against demand that outruns supply.
- Import replacement opportunities are substantial. Blueberries, feed grains, and the region's sole-source categories are import-exposed markets the Northwest can realistically supply.
- The binding constraints are land, labor, and processing, not demand. They yield to farmland-access programs, value-added processing investment, TOPP mentorship, and the certification and extension infrastructure profiled in the state sheets.

The six state profiles in Appendix A translate this regional picture into state-specific data, opportunities, barriers, and the farmer-support resources available in each state. Read together with the national and buyer-landscape companions, they are meant to help a Northwest grower move from "organic demand is growing" to "here is where my operation can fit into the overall picture."

SOURCES

A note on sources: National market figures come from the Organic Trade Association's 2026 Organic Market Report, which reports calendar-year 2025 consumer sales. State-level figures, including certified operations, acreage, commodities, funding, and sales, are drawn from the toolkit's six Northwest state profiles, which draw certified operations counts, and acreage where certifier reporting is complete, from current USDA Organic Integrity Database listings, and compile remaining acreage, commodity, funding, and sales detail from OTA state data and USDA's 2021 Certified Organic Survey and 2022 Census of Agriculture. Sources are cited inline in short form and listed in full at the end.

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ADVANCING REGIONAL ORGANIC MARKETS
THE NATIONAL LANDSCAPE

FARMERS' INSIGHTS

MARKET DEVELOPMENT and BUYERS RELATIONSHIPS

Wolf & Associates
THE ORGANIC SPECIALISTS



NATIONAL
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM



INSIGHTS from FARMERS

Project team members Levi Fredrikson and Sylvia Tawse interviewed six organic farmers during July 2026. All of these farmers maintain certified organic operations; two of them farmed both certified organic and non-organic acreage. All of them, ranging in age from 34 to 84, shared a deep reverence for working their land, and would rather not spend time in an office. Two interviewees opted to remain anonymous.

THE FARMERS:

- **Steve Ela** | Ela Family Farms and Former National Organic Standards Board Member – 100-acre organic orchard, Hotchkiss, Colorado
- **Bryce Loewen** | Blossom Bluff Orchards – 78-acre organic tree fruit, Parlier, California
- **David Larsen** | J.P. Larsen & Sons – 900-acre organic dairy farm, Newton, Utah
- **Marcia Litsinger** | Churchill Butte Organics – 80-acre certified organic farm (1-acre in cultivation) and CSA vegetables and fruit, Stagecoach, Nevada
- **Anonymous** | Organic grain and legume (corn, soybeans, oats), Nebraska
- **Anonymous** | Organic seed and feed grower, former dairy farmer, Washington

INTRODUCTION

Across a range of product types, farm sizes and states, common themes emerged in the interviews:

Diversity as Strategy: From diversity of plantings to diversity of sales channels and buyers. Not one of these farmers monocropped. One of them sold to only two buyers and told us he purposely grows “diversified crops; not buyers,” showing diversity is a strategic business decision.

Volatility is Real: From prices paid, to labor shortages to climate change impact (drought, wildfires, late freezes, longer growing seasons, new pests) to overall economic uncertainty, the volatility of organic farming is a shared reality for these growers.

Back-To-The Farm: Five of these six farmers grew up on their family’s farm, and each sought a career off-farm. Farming proved the stronger magnet, and these growers returned to farming, albeit bringing new practices and innovations to their operations.

Sizing Organic Up: One farmer cultivated on just one productive acre and another cultivated on 900 acres. Each farmer contributed to soil health, no matter their geographic imprint. No matter the size of the farm, these farmers demonstrated consistent, enthusiastic dedication to organic practices.

Love of The Land and Work: Each farmer communicated a reverence for their farm work, even some also admitted to burnout at times. They spoke joyfully of being on the land, in the orchard, at farmers' markets. One young, fourth-generation farmer referred to his organic farming work as “nourishing his soul” and another large-scale grain and legume grower simply said, “I love it.”

RELATIONSHIPS MATTER

Considering both the Buyer and Farmer interviews, the vital importance of respectful, close business relationships, preferably for the long term, shines through. There is no gap or inconsistency here between the buyers and the farmers. Buyers love to get to know their farmers and ranchers. Likewise, each of the growers highlighted the importance of maintaining good rapport with their buyers, whether it is just two buyers for 20 years, or, literally, hundreds of shoppers at farmers' markets and restaurants. Respect for each other's needs and capabilities is an important way to bring greater certainty to each link of the organic supply chain.

IN THEIR OWN WORDS | The following section contains the farmers' insights in their own words.

FINDING BUYERS: GETTING YOUR FOOT IN THE DOOR

"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

"You just kept your ear to the ground, and you watched the paper, and you listened for openings, and then talked to other growers. So, it was just paying attention." - **Steve**, Certified organic orchard

"Going out with your product in hand and meeting the buyers at grocery stores, or even going cold, visiting restaurants and dropping off a sample of what you do with your information - I think that goes a long way."

- **Bryce**, Certified organic tree fruit

"It's great to reach out via social media or phone or email, but if you can do it in person, there's still something special there that you can't replicate in a digital form." - **Bryce**, Certified organic tree fruit

"I think all they have to do is just show their cert and talk to them. I went into a restaurant, and I just showed him my vegetables, and he said, 'God, that spinach looks like steak.' And he was a customer ever since."

Marcia, Certified organic vegetable and fruit CSA

"Same with the [farmers'] market managers: you just get in there. You gotta have guts in order to get into this thing from the get-go anyway." - **Marcia**, Certified organic vegetable and fruit CSA

"For those people transitioning - you're saying, 'Well, who do I sell to?' And that's a good question. A good source is the Integrity Database. A lot of people aren't aware of that, but they should be."

- **Anonymous**, Certified organic grain and legumes

"As far as the seed companies, you've got to choose - you learn who not to sell to, and who to, eventually."

Anonymous, Certified organic seed and feed

THE BUYER RELATIONSHIP: MAKE IT A TWO-WAY STREET

"The buyer relationship to me was never a one-way street. It only worked if we could give them something that helped them, too." **Steve**, Certified organic orchard

"I just said [to our retail buyer], 'Pete, you are the top of the list. You will always be.' And that is true to this day. If we have anything to wholesale, that's the first person we call. We want to give them something nobody else has, because if they're in business, we're in business." - **Steve**, Certified organic orchard

"If we all are trying to be one unto ourselves, we're not going to accomplish too much. But if we're working together, twos and what not, you do a lot better." - **David**, Certified organic dairy

"He [a restaurateur] started buying from me, and he started telling people. In fact, he wrote a book, and it says, 'Marcia is my first farmer.' He was a big supporter and got my name out." - **Marcia**, Certified organic vegetable and fruit CSA

"I've been the full supplier of their organic crops, which makes me nervous - because the quality I get is the quality they get. But they're tremendous people. They said, 'No matter what, you're going to do the best you can, so we'll take what you get.'" - **Anonymous**, Certified organic seed and feed

MARKET CHANNELS AND DIVERSIFICATION

"There's no one thing that I would name, because it is actually the mix. That diversity is what has kept us alive."

Steve, Certified organic orchard

"Farmers' markets saved us – this doubled our sales." – **Steve**, Certified organic orchard

"Restaurants started showing up at farmers' markets to buy fruit. And then we decided, well, how about instead of dipping into our supply, we deliver to you directly? So that spawned this delivery route. And from there we thought, well, if we can do it for restaurants, why not stores?" – **Bryce**, Certified organic tree fruit

"Pretty close to when I moved back, around 2008 to 2010, we finally completely divorced ourselves from the wholesale system and started direct marketing everything – farmers' markets, restaurants, or stores."

– **Bryce**, Certified organic tree fruit

"I read in Mother Jones, many years ago, about the CSA program. And I thought, 'Wow, this could work for me.' And it did." - **Marcia**, Certified organic vegetable and fruit CSA

"You need to know your market, if you have a market. And you have to be able to deal with failure - if you can't deal with failure, you'd better stop, because there's going to be some. That's why we stay very, very diversified."

– **Anonymous**, Certified organic seed and feed

PRICING, COMMODITIES AND THE VALUE OF YOUR PRODUCT

"The lesson in 1998 was: try to stay out of the commodity market." - **Steve**, Certified organic orchard

"By going direct to those stores, it could be a win-win - we could charge less than they were paying a distributor, and we got more than we would have gotten otherwise. We made more money, they saved money."

– **Steve**, Certified organic orchard

"It's really hard to get folks to pay more for food - at least for the kind of food we're growing."

– **Bryce**, Certified organic tree fruit

"If you have a new crop, you definitely want to have that contracted or be working with a buyer that stands behind what you're growing." – **Anonymous**, Certified organic grain and legumes

"We've always looked at it and produced for a margin. It's a little bit easier when you sign a milk contract for the year - it did away with the highs and lows quite nicely." – **David**, Certified organic dairy

SCALE: THE CASE FOR STAYING SMALL

"People have always asked us if we wanted to get bigger, and my answer has almost always been that we should get smaller. Going smaller is smarter." – **Steve**, Certified organic orchard

"How to make certification accessible to smaller growers? It is the question right now. We need to reimagine things."

– **Steve**, Certified organic orchard

"I only did two restaurants, because I never wanted to get big. Getting big would require more water than I had, more energy than I had." - **Marcia**, Certified organic vegetable and fruit CSA

WORKING WITH NEIGHBORS: BUILDING CRITICAL MASS

"Even if we're competing with each other, we need each other as well. If they didn't exist, it would be a much rougher go for me." – **Steve**, Certified organic orchard

"[My neighbor] could have definitely gate-kept that, if he was that type of person, but he gave me their info, and it has been a great relationship. Trying to help each other is a good way for all boats to rise." - **Bryce**, Certified organic tree fruit

"If someone had the time to organize a more effective local food hub here, I would sign up right away. I'd love to have more of our stuff stay as close to home as possible." – **Bryce**, Certified organic tree fruit

"We shook hands and said, 'Whatever you do, we'll do together.' And to have more of a load of milk, it was fabulous." – **David**, Certified organic dairy

"We just learn from everybody that we can - other organic people. Most of them will share things with you pretty well." - **Anonymous**, Certified organic seed and feed

CONSISTENCY, BRAND AND REPUTATION

"We probably only missed maybe four farmers' markets that we said we'd be at, over 25 years. Rain or shine, snow or blow, we're going to be there - and then try to do a good job, give people something they like, so they'll talk about it." – **Steve**, Certified organic orchard

"A lot of folks, because we've built up our brand, end up getting in touch with me and finding us. That's nice - less legwork." – **Bryce**, Certified organic tree fruit

BARRIERS, PAPERWORK AND GETTING PAID

"We have the three M's: markets, markets, markets. That's the biggest thing." – **Anonymous**, Certified organic grain and legumes

"Those two markets are pretty straightforward. Part of that is making sure you get paid." – **Anonymous**, Certified organic grain and legumes

"New people don't have an understanding of maybe tagging their trucks. The truck shows up and it doesn't have the bill of lading, doesn't have a clean certificate - that's the reason those buyers like to go with more experienced people that have all their paperwork ready." – **Anonymous**, Certified organic grain and legumes

"Most of what we get is contracts - we don't get paid unless the crop is sold prior to June 1 of the next year. It's nice to get paid." – **Anonymous**, Certified organic seed and feed

"As time has gone on, it hasn't been too bad for me. I record at the end of each day what's been done on organic acreage. I do it daily. When there's a spot inspection, I just print out my notes and hand them to the inspector." – **Anonymous**, Certified organic seed and feed

"Consistency - that's been our biggest problem. You develop a market, and then if you don't have a crop for a year, it's really hard to keep those buyers and shoppers." - **Steve**, Certified organic orchard

“That's the one thing I see that has kept a lot of people out of the organic market - the ability to go across. The animal farmer, especially the milk farmer, is put a little bit behind the eight ball.” – David, Certified organic dairy.

PROGRAMS, MENTORSHIP AND THE CASE FOR ORGANIC

“The TOPP program is something that is really valuable to beginning farmers. Whether you're starting a backyard farm or a 100-acre farm, getting in with TOPP is a good one, because you've got a mentor there. It's a win-win situation.”

– **Marcia**, Certified organic vegetable and fruit CSA

“Instead of just saying ‘certified organic’ and being done, we've gone back to explaining what it is to people - rebuilding that case for organics that we'd kind of quit doing.” – Steve, Certified organic orchard

WHY FARM ORGANICALLY?

“I stayed and worked in the city [after college]. I learned I like cows better than people.” – David, Certified organic dairy

“Going organic really helped the bottom line. We found contracts at a higher pay rate. We had to look for a niche'- not having to spray- it helped our son with his asthma.” – David, Certified organic dairy

“Life is good. We have no problems. I love the lifestyle. The sense of gratitude when everything turns out correct.”

– **Anonymous**, Certified organic seed and feed

“We want to do things right: organic plus soil practices plus goal of growing all fertility on farm and generating zero food waste and 50% to 60% of our electricity.” - Steve, Certified organic orchard

“I wouldn't be happy in a job that just provided a paycheck – stole from my soul instead of nourishing it.”

– **Bryce**, Certified organic tree fruit



ADVANCING REGIONAL ORGANIC MARKETS | THE NATIONAL LANDSCAPE

A BUYER'S LANDSCAPE

ADVANCING REGIONAL ORGANIC MARKETS

A BUYER'S LANDSCAPE

ABOUT A BUYER'S LANDSCAPE

The simple and timely goal of this section is to provide a realistic view of what today's organic farmers face when finding the optimal sales outlets for their products and informed recommendations for paths to success. The project team interviewed 28 organic buyers at a wide variety of operations. Interviewees included representatives of independent retailers, regional and national retail chains, schools and institutions, food and feed grain companies, seeds buyers, organic dairy companies, cotton products businesses, and direct-to consumer processed foods companies. Interviews were conducted August-September 2025, and May-July 2026, primarily via video calls supplemented with written statements. For farmers seeking a strategic approach, these insights from buyers can help chart a path for the next productive season.

The project team also interviewed a spectrum of organic farmers to learn their most successful marketing tactics and sales channels. These interviews helped to affirm what is working across a diverse organic supply chain. With myriad ways to sell one's organic and transitional specialty crops and proteins, seeds, commodities and value-added products, keeping current and making strategic decisions are vitally important.

MEET TODAY'S BUYERS: A DIVERSE GROUP

Buyers are not one monolithic group. A natural foods retailer, a food hub, a school district buyer, and a grain buyer are operating under completely different constraints. One of the biggest pitfalls is assuming that what works for one buyer will work for all. Nevertheless, several common themes emerged from the buyer interviews.

Communication and Market Research Matter

One of the most common themes from buyers across the board was the need for clear, open and timely communication. Several emphasized the need to be honest about harvest dates and quantities, quality issues that may have resulted from weather or other issues, changes to delivery schedules, capacity for post-harvest handling of organic products, and price inquiries. Timeliness mattered as well—buyers generally wanted to hear back from any questions or inquiries promptly.

"Just communicate consistently. If someone is communicating consistently in front of me, that cuts both ways, especially on pricing." – **Clay**, National Grain Wholesaler/Buyer

Another common need was understanding the buyer's business model. Essentially, understand who the buyer's customer is, and roughly how much are they paying for the product. Produce distributors and retail store buyers, especially independent stores and regional chains, emphasized that they will not be paying the same prices for fresh produce and other products that farms might be charging at direct-to-consumer farmers' markets. Institutional buyers also discussed price as an impediment to expanding their certified organic offerings.

Essential Documentation

Universally, buyers wanted to see organic certificates in order to do business. Other purchase criteria depend on the product and individual company involved. For example, schools and institutional buyers had vendor applications and orientation for new suppliers. Some common criteria buyers mentioned include proof of insurance, tax ID information, food safety certification, animal welfare certification (particularly from Validus), and product testing, especially in dairy, ingredients destined for baby food (heavy metals, pesticide residues, etc.), seed production (purity, viability, germination, vigor, etc.), and grains/beans (mycotoxins). One buyer mentioned the need for Kosher certification.

"Our ideal would be to work with farmers directly. Our more stringent standards can make that difficult."
– **Grace**, Senior Director of Procurement for a national baby food brand.

Most, but not all, buyers worked with seasonal contracts. Some were able to take advantage of the spot market of bumper crops or to fill in for shortfalls of high-demand products. The time to get into the market varied greatly, with a few buyers needing several months to a year to establish a new business relationship, and others who could set up a new supplier quickly, especially if there was a need for the product. For many buyers, particularly seed, grain and bean buyers, arrangements with new suppliers happen at a particular time of the year. The window ranged from late fall to early spring, or generally after the harvest. Miss that window, and there may be many months before it would be possible to negotiate a contract.

“We see this as a long game- we want stability for our farmers. We want for our farmers to make a living. We don’t have a business without our farmers. It’s true, we want a partnership.” – **Head of Milk Procurement** for two national organic dairy brands.

Transportation Considerations

Transportation of goods was a concern of several of the buyers, and an extremely critical consideration for all grain and dairy/whole milk buyers. Some buyers required the farm to deliver with very specific time, quality and packaging requirements, and others picked up the product. Either way, a farm’s location relative to the buyer’s routes or processing facilities can be a major factor in success with a particular buyer. For those buyers that pick up product, a new supplier is more appealing if they are close to current suppliers, or if there is a larger volume of product to make a trip more worthwhile. In these interviews, nearly every buyer who picked up products at the farm appreciated farmers who worked together to help fill their trucks.

TIP: Reach out to neighboring farmers/ranchers to coordinate a collective pitch to key buyers.

“It’s great when there is a group of certified organic farmers so we can fill the truck.”

– **Farm Industry Engagement and Sustainable Procurement Team Leader** for national dairy brand.

First Contact and Continued Support

Several buyers, particularly grain buyers, regularly seek out new contacts and prospective suppliers at state and regional organic farm conferences and field days. They suggested that attending these events and visiting buyer booths is a relatively inexpensive way to make viable business contacts and also connect with other farmers.

“If your county or state is hosting a conference, GO! There are a lot more buyers than farmers there and it is not expensive to go.” – **Clay**, Buyer & Wholesaler/ National Grain Wholesaler

Support for farms in transition to organic varied. A few buyers offered a transition incentive or bonus or a premium for products from farms transitioning to organic. If the buyer has an outlet in the non-GMO market, that support is more likely. Other buyers offer technical assistance or access to particular seed varieties.

“I’ve likened our role to being a coach. This is a relationship. The more we develop a relationship with our farmers, the better business is for both parties.” – **Head of Milk Procurement** for two national organic dairy brands.

BUYER PERSONAS: HOW TO DELIGHT THEM

Buyers communication styles varied. A few buyers indicated a preference for calls or emails, but most were open to inquiries from new contacts in whatever way the contact preferred.

Within our buyer interviews, several personality types emerged, however. Making use of prospects’ personas could make for a smoother business relationship. Here are some personas farmers may encounter, and tips for success:

Get Down to Business | Veteran pro who doesn't waste time for themselves or their company.

Write thorough emails and respond swiftly. There won't be a lot of time for chit-chat, but this could be a long-term business relationship with many benefits.

Go With the Flow | Everything is fine as long as the organic deliveries make it on time.

Make sure to share your organic farm's true story and confirm the buyer's needs. Let them know why you are committed to organic.

The Bureaucrat | There is a lot of process to get to a purchase, but the system can be rewarding.

Be patient with all the protocols. Ask for help when stuck. Keep the relationship energetic and warm. Once your foot is firmly in the door, ask how you can expand what you do.

Newbie Terrier Puppy | Super excited to work with organic farmers, as long as they can text.

Be a coach when warranted and clarify facts in an educational way. Make sure they fully understand your operation's capabilities. Return text messages as soon as possible.

Confused Contrarian | Misunderstands the difference between Regenerative and Organic, assuming Regenerative is superior for soil health and shaping purchasing decisions around that belief.

Use their confusion as a chance to explain organic practices and approach to soil health and water safety. Approach the conversation as a supportive colleague who genuinely cares about helping them understand the difference.

The Connector | Not a buyer at all, but an important matchmaker between organic farmers and buyers.

Do not underestimate the power of these influencers. They can make introductions to institutional buyers you would not otherwise meet. These folks are also organic cheerleaders with a vision for a healthier world.

BUILDING A STRONG BUSINESS RELATIONSHIP

Across 28 buyer interviews, buyers were remarkably consistent. These are the qualities that turn a first conversation into a lasting business relationship.

Communication | They prefer over-communication, even when the news is negative.

Consistency & Quality | Sizing, packaging, on-time delivery at proper temperature, food safety, animal welfare, and transportation compliance.

Caring | They want a two-way street: a mutually beneficial relationship.

Collaboration | They appreciate cooperatives and collaborative efforts among farmers.

Connection | They like meeting farmers at events and love visiting farms. Retail buyers especially want to know growers' stories.

Cost | All buyers need pricing that works for their business models and want farmers to understand that need.

COMMUNICATION MATTERS

Buyers were emphatic: You cannot over-communicate. They value clear communication, prompt responses, fewer surprises, and a phone call when something changes. They also recognize that farmers are busy and, in the field, but even a quick confirmation message about following up later builds trust.

From the Buyers:

"You cannot over communicate!" – **Chris**, Natural Foods Retailer

"Be a good communicator. Clear; not chatty. We prefer someone who picks up the phone." – **Bu**, Wholesale Distributor

"Most important is ongoing communication and keeping in touch. Minimizing surprises is valuable."

– **Jess**, Wholesale Distributor

"It takes a year to fully build that farmer relationship. There is a lot of communication. We act as a guide."

– **Sarah**, Wholesale Distributor

"Sometimes it's hard to get ahold of them. Farmers are out in the field. A prompt response (from farmers) improves the relationship." – **Carolyn**, Institutional Food Service Buyer

From the Growers:

"I think all they have to do is just show their cert and talk to them. I went into a restaurant, and I just showed him my vegetables, and he said, 'God, that spinach looks like steak.' And he was a customer ever since."

– **Marcia**, Certified organic vegetable and fruit CSA

CONSISTENCY MATTERS

Consistency came up more than price. Buyers want consistent quality, predictable supply, and clear expectations. They would rather work with a farmer who produces a narrower range of products really well than someone offering a lot of variability. Knowing what success looks like to a buyer, including pack, size, and specs, is essential.

From the Buyers:

"Our number one attribute is consistent quality. Know the difference between quality and condition. Know what makes a successful pack." – **Kenny**, Natural Foods Retailer

"We want consistency instead of variability in cost, supply, and quality."

– **Director of Procurement**, Institutional Food Service

"We like to have the relationship with farmers formalized so we can give our clear expectations."

– **Grain Buyer**

From the Growers:

"We probably only missed maybe four farmers' markets that we said we'd be at, over 25 years. Rain or shine, snow or blow, we're going to be there - and then try to do a good job, give people something they like, so they'll talk about it."

– **Steve**, Certified organic orchard

"A lot of folks, because we've built up our brand, end up getting in touch with me and finding us. That's nice - less legwork." – **Bryce**, Certified organic tree fruit

CARING MATTERS

Buyers notice when farmers see the relationship as a partnership instead of a transaction. They value farmers who understand the buyer's constraints, win-win thinking, patience and persistence, and a real story rather than marketing fluff. Trust builds when both sides want each other to succeed.

From the Buyers:

"I want to hear the farmer's story. Simple, personal connection matters." – **Jacob**, Institutional Food Service Buyer

"Put yourself in the buyer's shoes." – **Jim**, Grain Buyer

"In order for the grower to succeed, the buyer must succeed. I think any business relationship should have a win-win attitude. Relationships are based on trust. I like a sense of partnership with farmers." – **Bulk Buyer**, Organic Wholesaler

"Be persistent. Be patient. Yes, we can build a relationship." – **Bu**, Wholesale Distributor

From the Growers:

"The buyer relationship to me was never a one-way street. It only worked if we could give them something that helped them, too." – **Steve**, Certified organic orchard

"He started buying from me, and he started telling people. In fact, he wrote a book, and it says, 'Marcia is my first farmer.' He was a big supporter and got my name out." – **Marcia**, Certified organic vegetable and fruit CSA

COLLABORATION MATTERS

Many buyers, especially institutional and fiber buyers, emphasized collaboration: joining with other farms to meet volume needs, working through cooperatives, asking questions early in the planning process, and understanding bid requirements. Collaboration reduces risk for everyone involved.

From the Buyers:

"Go through the school district's bid process. If you have questions, ask us. We encourage smaller farms to join other farms. We pay on time." – **Randal**, Institutional Food Service Buyer

"We appreciate collaboration in advance -- we need to hear from farmers prior to their season." – **Carolyn**, Institutional Food Service

"It's easier to pool our cotton into our co-operative. The co-op then finds buyers." – **Clay**, Cotton Cooperative Buyer

"[I like] organic farmers to show earnestness...to share honest feedback. I like getting to know them. I work as hard as I can to make them successful." – **Clay**, Buyer and Wholesaler/National Grain Wholesaler

From the Growers:

"Trying to help each other is a good way for all boats to rise." – **Bryce**, Certified organic tree fruit

"Even if we're competing with each other, we need each other as well. If they didn't exist, it would be a much rougher go for me." – **Steve**, Certified organic orchard

"We just learn from everybody that we can - other organic people. Most of them will share things with you pretty well."
– **Certified organic seed and feed grower**

"We shook hands and said, 'Whatever you do, we'll do together.' And to have more of a load of milk, it was fabulous."
– **David**, Certified organic dairy

CONNECTION MATTERS

Buyers want to see the farm when possible -- walking fields, understanding practices, and building internal advocacy. They also stressed doing in-store research, looking at labels and shelf placement, and understanding how your product shows up to the consumer. Connection turns a supplier into 'our farmer.' Your story, your passion, and your reasons for growing what you grow matter to retailers.

From the Buyers:

"I love walking the fields with my Produce Team. If you can get out to the farm, it creates inspiration and advocacy for organic." – **Chris**, Natural Foods Retailer

"Do your homework. Go to the store and do research. Come in with your eyes wide open." – **Kenny**, Natural Foods Retailer

"Walk into the store and look at labels and see what is on the shelf. We're big on grower profiles." – **Allan**, Natural Foods Retailer

"We buy directly from farms and dairies. I'll physically drive my truck to pick up from a local farm." – **Jacob**, Institutional Food Service Buyer

"We really look forward to meeting with the farmers. We're open to all!" – **Farm Industry Engagement and Sustainable Procurement Team Leader** for national dairy brand.

From the Growers:

"It's great to reach out via social media or phone or email, but if you can do it in person, there's still something special there that you can't replicate in a digital form." – **Bryce**, Certified organic tree fruit

"Same with the market managers: you just get in there. You gotta have guts in order to get into this thing from the get-go anyway." – **Marcia**, Certified organic vegetable and fruit CSA

"Restaurants started showing up at farmers' markets to buy fruit. And then we decided, well, how about instead of dipping into our supply, we deliver to you directly? So that spawned this delivery route. And from there we thought, well, if we can do it for restaurants, why not stores?" – **Bryce**, Certified organic tree fruit

COST MATTERS

This was the most candid theme. Most buyers cannot pay farmers' market prices, are working with fixed budgets, and face pressure from consumers and institutions. At the same time, some buyers are willing to pay slightly more for truly local, reliable, organic supply, especially when quality and consistency are strong.

From the Buyers:

"I cannot pay farmers' market prices. That's often an awakening for growers. I cannot sell a head of lettuce for \$5.99."
– **Chris**, Natural Foods Retailer

"We struggle with dollars allocated and with getting organic. We are very limited as cost is an impediment. High price points make it almost impossible." – **Naima**, Institutional Food Service Buyer

"In schools, cost is a consideration." – **Carolyn**, Institutional Food Service

"Cost is a big factor in deciding which organic growers we buy from." – **Jim**, Grain Buyer

"We'll pay a bit more for truly local and take less on margin." – **Kenny**, Natural Foods Retailer

"Yes, we always want the deepest production possible and [our] price is never high enough [for farmers]."
– **Bean and Grain VP, National Bean and Grain Wholesaler**

From the Growers:

"You need to know your market, if you have a market. And you have to be able to deal with failure - if you can't deal with failure, you'd better stop, because there's going to be some. That's why we stay very, very diversified."
– **Certified organic seed and feed grower**

"It's really hard to get folks to pay more for food - at least for the kind of food we're growing."
– **Bryce**, Certified organic tree fruit

"If you have a new crop, you definitely want to have that contracted or be working with a buyer that stands behind what you're growing." – **Certified organic grain farmer** (corn, soybeans, oats)

"We've always looked at it and produced for a margin. It's a little bit easier when you sign a milk contract for the year - it did away with the highs and lows quite nicely." – **David**, Certified organic dairy

UNDERSTANDING MARKET NUANCES BY BUYER TYPE

Organic farmers and ranchers have many options for selling their products. Looking at buyer needs by type may facilitate finding markets that best match farmer's preferences and their operation's strengths and constraints.

Retail Grocery Buyers (Natural Foods Stores)

Key Insight: It can take as long as a full year to get into the larger, national retail chains, while independent retailers may bring in new vendors and farmers within a matter of days.

- Being local to the store is a benefit
- Premiums for products in transition to organic may be negotiable
- Buyers admit a preference for veteran farmers over new farmers, but appreciate new growers who come prepared and provide samples

- Buyers want to build long-term relationships and value a farmer's true story
- Boom-and-bust cycles are real
- Gaps cited: organic floral, heirloom apples, culinary mushroom varieties, and produce that aligns with the cultural heritage of the community

Natural and Organic Wholesale Buyers

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

- Buyers need growers to understand wholesale pricing
- Buyers want growers who love what they grow, not growers chasing prices
- Focusing on fewer crops at higher quality is a bonus
- Knowing what is saturated in the marketplace is appreciated
- Working cooperatively with other nearby organic growers is a plus
- Just pick up the phone and start the conversation
- Some buyers work with brokers; ask for a list

Institutional Buyers: School Districts and Food Service

Key Insight: Every school district buyer, manager, and chef interviewed wants organic root vegetables and correctly sized fruit, especially apples, oranges, and berries, for the entire school year.

- Expect a bid process
- Some districts and food service buyers rely on food hubs
- Activists and advocates for healthier school meals boost use of organic ingredients
- School districts plan menus months in advance; use this to your advantage
- School food advocates can serve as connectors to district purchasers
- More districts are shifting to scratch cooking to improve nutrition and taste
- Cost can be a barrier, but school districts are known for paying on time

Grain and Bean Buyers: Feed and Food Grade

Key Insight: Ask the buyer for crop specifics before buying seed or planting. Some require particular varieties, and some offer seed programs or bulk buying opportunities for growers.

- Most work on multi-year contracts
- Samples are essential, as buyers send them for testing
- Longer planning periods are the norm
- Infestation of grain deliveries is the leading quality concern
- Grains destined for the gluten-free market must be without contamination from buckwheat. Clean bins/trailers before storage.
- Make sure the farm has the appropriate harvesting equipment, especially for food grade beans.
- Grain buyers like to work with farmers year-over-year

- Grain prices are down across the board due to import pressure
- Several buyers offer programs to support farmer success
- Most grain buyers have a multi-state regional sourcing protocol
- Current supply gaps include field peas, lentils, milo, feed-grade organic corn, soy, and high-oleic soy, white kidney beans

Organic Fiber and Seed

Key Insight: If you grow cotton, participating in a Cotton Cooperative will greatly enhance your ability to sell your crop. If you grow seed, know all legal requirements in advance to save yourself future headaches.

Organic Fiber:

- Organic fiber is experiencing profound challenges as a sector
- Inconsistent weather conditions affect cotton quality and reduce yields
- Most domestic organic cotton is sold for non-woven products
- Domestic manufacturing infrastructure is insufficient
- Joining an Organic Fiber Cooperative offers a path to success

Organic Seed:

- Being a farmer is not the same as being a seed farmer
- There are legal requirements for seed purity
- Weed seed in the seed crop is a big problem
- Farmers must provide a good composite sample at harvest
- Consider profitability over multiple years
- Supply gaps for cover crop seed include radishes, oats, rye, and peas

Dairy/Whole Milk

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

- Certified organic whole milk buyers love to maintain long-term relationships.
- Location matters. Farmers in specific geographic regions where there is already a hub of farmers in their network are strongly preferred.
- Farms of all sizes are welcome, provided there is enough volume along the pick-up route.
- Organic dairy offers prices premiums over non-organic, and perhaps as importantly, offers a more consistent price over time.
- Some buyers, especially large-scale national brands, offer quality and volume bonuses.
- Large-scale buyers may offer help with annual certification requirements and inspections or coaching on quality improvements and practices to increase production.
- Organic dairy farmers who grass feed their cows are sought after in the current marketplace

WAYS TO REACH BUYERS

Finding buyers does not require a large marketing budget. Many of the most effective approaches are relationship-driven and accessible even to small or first-time sellers.

1. Attend conferences, trade shows, and field or farm days: these bring together retailers, distributors, chefs, and food service buyers looking for new suppliers.
2. Ask neighbors and fellow producers for recommendations: Farmers often know who pays well, communicates clearly, and buys consistently.
3. Use the Organic Integrity Database and directories: for example, the Practical Farmers small grains business directory and similar category-specific listings.
4. Check the websites of potential markets for vendor information: Many buyers post category review schedules, packaging and labeling requirements, and instructions for submitting samples.
5. Call or email directly: A short, targeted outreach is expected and welcomed by most buyers.
6. Work with your local food hub: Food hubs and regional aggregators often buy from small and mid-sized farms and already have strong relationships with retailers and institutions.
7. Connect through local and regional organic farmer networks and associations.
8. Build a simple, professional web presence with contact information and product availability.
9. Use social media to share your story and attract buyers.
- 10 Leverage Transition to Organic Partnership Program and Rodale Institute connections and referrals.

“You just kept your ear to the ground, and you watched the paper, and you listened for openings, and then talked to other growers. So, it was just paying attention.” – Steve, Organic orchard

A LOOK AHEAD: CHALLENGES AND OPPORTUNITIES

Although the U.S. organic sales reached \$76.6 billion industry in 2025, up 6.8% over the prior year, some big-picture challenges emerged during the buyer interviews:

Misinformation is rampant. There is confusion amongst buyers and consumers alike about what certified organic label means. Example: One of the institutional buyers thought organic farmers didn’t use cover crops and only regenerative farmers used cover crops and other soil health practices.

Regenerative agriculture is rising in awareness—and confusion. Our buyers were split on their opinion of organic regenerative farming; some were advocates for both organic and regenerative and a few were cynical about regenerative claims calling them ‘greenwashing.’ The current polarization around these two agricultural approaches is confusing to both consumers and media. More cogent and balanced education is needed.

Some sectors of organic are extremely challenging: Organic fiber and meat are examples of extreme pricing sensitivity. Others, such as organic grains, are experiencing import pressure even as there are gaps for organic corn and soy for feed.

Evolving diet preferences, such as desire for higher protein or plant-based products, and medical innovations, such as GLP1 medications, can dramatically shift demand for organic products, especially meat and dairy.

Meanwhile, several bright spots emerged for organic farmers, ranchers, and producers looking ahead.

- School districts represent a major opportunity, especially in states where free breakfast, lunch, and snacks are universal.

- Listening to buyers is appreciated and is good for current and future business.
- Nutrient density is emerging as a buying criterion: Offering data on soil health and nutrient density will likely please buyers.
- Cover crops can become revenue crops: Some buyers support farmer success by recommending cover crops that can actually become revenue crops.

The clearest message from buyers, repeated across categories: **"Love what you grow."**

CHECKLIST FOR SUCCESS WITH BUYERS

Buyers consistently recommended a clear set of practices for outreach, summarized in this checklist. Check whether or not your farm is doing the following:

- Research the company to understand the business model and pricing constraints.
- Read supplier information on the buyer's web site or company literature.
- Know the price I need for my crop/product to be profitable, including any post-harvest activities and transportation costs.
- Ask about gaps in supply and future needs.
- Understand what is oversaturated in my market.
- Personalize any email or texts (no mass emails/group texts).
- Send samples as requested.
- Follow up with a phone call or email.
- Respond promptly (ideally within 24 hours) to the buyer.
- Communicate any changes in harvest or delivery timing, quality, or quantity (even if it is bad news).
- Made transportation arrangements that will ensure the product arrives on time and in good condition.
- Maintain patient persistence in outreach.
- Act in a way that could build a long-term business relationship.

ADDITIONAL RESOURCES

Organic Farmer Storytelling Resources, <https://organicfarmersassociation.org/organic-farmer-storytelling-project>. Tools to help growers communicate their farm's story and organic journey.

Organic Integrity Database, <https://organic.ams.usda.gov/integrity/>. Listings of organic farms and businesses certified to the US National Organic Program.

Organic Producer Marketing Toolkit, <https://www.ccof.org/organic-producer-marketing-toolkit/>. Strategies and insights to help farms and ranches market their organic products. Learn how to reach a target audience and tell the farm's unique story in a way that resonates with customers.

Transition to Organic Partnership Program, <https://www.organictransition.org/events/> Listings for field days, conferences, and other events for the organic farm community.

Validus Verification Services, <https://www.validuservices.com>. Third-party animal welfare certification of interest to some dairy buyers.

SOURCES

Organic Trade Association. 2026 Organic Market Report (calendar-year 2025 consumer sales; U.S. organic sales reached \$76.6 billion, +6.8%), <https://ota.com/OrganicMarketReport>



Appendix A: State Data Sheets

NORTHEAST

Connecticut

Dense suburban markets drive premium vegetables, dairy, and orchard crops across New England's smallest farming state



NORTHEAST/ MID-ATLANTIC TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Connecticut ranks **33rd nationally with 166 certified organic operations and 34,790 certified acres**. Surrounded by major metro markets, Connecticut organic farms command among the highest per-acre premiums in the nation. With \$5.4M in OREI/ORG funding and UConn Extension's statewide reach, the state's challenge is not demand but supply: land costs and farm scale limit the expansion of what is already a high-performing organic sector.

166 CERTIFIED OPERATIONS	34,790 CERTIFIED ACRES	\$5.4M OREI / ORG FUNDING	+28% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	166 (33rd nationally)
Certified organic acres	34,790
OREI / ORG funding (cumulative)	\$5.4M
Worker employment vs. conventional	+28%
Split operations	41% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Leverage Connecticut's dense suburban consumer base to build premium direct market and farm-to-table channels.
- Expand organic dairy supply with NRCS transition assistance and Northeast TOPP mentor matching.
- Grow organic orchard and berry operations serving the premium pick-your-own and agritourism market segment.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** suburban proximity drives strong CSA and direct market demand.
- ▶ **Dairy:** Litchfield Hills organic dairy supplies regional cooperatives.
- ▶ **Fruit & Orchard:** organic apples, blueberries, and strawberries for farm stands.
- ▶ **Greenhouse & Nursery:** organic transplants serve specialty growers and retail markets.

BARRIERS

- High land costs near metro corridors create severe new entrant access barriers statewide.
- Small farm size limits organic grain and feed self-sufficiency, driving up per-unit input costs.
- Fragmented farmland parcels constrain scaling, shared equipment investment, and cooperative aggregation.

KEY TAKEAWAY

Connecticut's dense metro markets and farm-to-table culture create premium pricing that few states can match. The central challenge is land access and scale: high values near the I-95 corridor limit new entrant viability, making NRCS cost-share and Northeast TOPP mentorship essential for sustaining the next generation of organic producers.

Resources for Farmers

Connecticut organic farmers are supported by NOFA-CT, the Connecticut Department of Agriculture, UConn Extension, and Northeast TOPP. Together they connect farm transitions, certification cost-share, and research directly to the state's premium consumer markets.

NOFA-CT

FARMER ADVOCACY & PEER LEARNING

- Connecticut chapter of the Northeast Organic Farming Association
- Farmer-to-farmer mentorship and organic transition peer networks
- Annual NOFA-CT winter conference and summer farm tour program
- Organic certification guidance and cost-share navigation support

ctnofa.org

CT Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Connecticut Grown branding for state-produced organic products
- Beginning Farmer Loan Program and farmland preservation access
- NRCS Connecticut: EQIP Organic Initiative transition cost-share

portal.ct.gov/DOAG

UConn Extension (CAHNR)

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, fruit, and dairy production specialists statewide
- Soil health, IPM, and cover crop research for Northeast conditions
- UConn Beginning Farmer Program: land access, business, and organic planning
- Annual New England Vegetable and Fruit Conference technical sessions

extension.uconn.edu

Northeast TOPP (NOFA-NE-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NJ, NY, PA, RI, VT, WV, MD, DE
- Paid organic mentor matching for vegetable, dairy, and diversified farms
- Workshops on organic vegetable systems and Northeast dairy transition
- Beginning farmer certification navigation and transition cost-share support

nofane.org/topp

DID YOU KNOW? CONNECTICUT

Connecticut organic farms earn some of the highest per-acre revenues in the nation due to their proximity to New York City and other major metro markets. The state's dense population and high median income mean organic consumers are within a short drive of most farms. Despite this premium environment, fewer than 1% of Connecticut farms are certified organic, meaning demand far outpaces local supply. Northeast TOPP mentorship and UConn Extension's beginning farmer programs are the critical tools for closing that gap and bringing the next generation into organic production.

KEY SOURCES

Organic Trade Association. "Connecticut Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Connecticut Department of Agriculture. "CT Organic Certification Program." CT DoAg, 2025, portal.ct.gov/DOAG.

Massachusetts

New England's most concentrated organic consumer market surrounded by premium vegetable, dairy, and orchard farms



**NORTHEAST/
MID-ATLANTIC**
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Massachusetts ranks 25th nationally with 317 certified organic operations and 4,082 certified acres.

Massachusetts combines one of the nation's highest concentrations of organic consumers with a vibrant small-farm network that has pioneered organic production since the 1970s. With \$6.2M in OREI/ORG funding and UMass Extension's applied research, the state's organic sector is constrained not by demand but by land availability and farm scale.

317 CERTIFIED OPERATIONS	4,082 CERTIFIED ACRES	\$6.2M OREI / ORG FUNDING	+32% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	317 (25th nationally)
Certified organic acres	4,082
OREI / ORG FUNDING (cumulative)	\$6.2M
Worker employment vs. conventional	+32%
Split operations	37% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Leverage Boston and Cambridge's dense organic consumer base to build premium direct market supply chains.
- Expand organic cranberry production on South Shore bogs for the premium juice and dried fruit markets.
- Grow organic dairy and farmstead cheese for the Pioneer Valley's strong farm-to-table and specialty food market.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** organic farms supply Boston, Cambridge, and Pioneer Valley markets.
- ▶ **Dairy & Cheese:** Pioneer Valley organic dairy supplies regional cooperatives.
- ▶ **Fruit & Cranberries:** organic cranberries lead Massachusetts premium retail channels.
- ▶ **Greenhouse & Nursery:** organic transplants serve the region's strong CSA sector.

BARRIERS

- Extremely high land values near metro Boston create severe barriers for new entrant organic farms.
- Small farm scale limits the economics of organic grain and feed self-sufficiency for livestock operations.
- Short New England growing season compresses production windows and limits crop diversification options.

KEY TAKEAWAY

Massachusetts organic farms earn premium prices because they are embedded in one of the nation's most sophisticated organic consumer markets. The state's central challenge is land access: without active farmland preservation and affordable access programs, the next generation of organic producers will be priced out of the Boston orbit entirely.

Resources for Farmers

Massachusetts organic farmers are supported by NOFA-Mass, the Massachusetts Department of Agricultural Resources, UMass Extension, and Northeast TOPP. Together they deliver farmer advocacy, certification cost-share, applied research, and mentorship to sustain and grow the state's organic sector.

NOFA-Mass

FARMER ADVOCACY & PEER LEARNING

- Massachusetts chapter of the Northeast Organic Farming Association since 1982
- Annual NOFA-Mass Summer Conference: New England's premier organic farming event
- Farmer-to-farmer mentorship and organic transition peer learning networks
- Organic certification guidance and cost-share navigation support

nofamass.org

MA Dept of Agricultural Resources

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Massachusetts Grown branding for state-produced organic products
- Agricultural Preservation Restriction program: farmland access for organic producers
- NRCS Massachusetts: EQIP Organic Initiative and Transition Assistance programs

mass.gov/orgs/massachusetts-department-of-agricultural-resources

UMass Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, fruit, dairy, and cranberry production specialists
- Center for Agriculture, Food and the Environment: organic systems research hub
- Soil health, IPM, and season extension research for Northeast organic farms
- Beginning farmer programs and organic transition planning support

extension.umass.edu

Northeast TOPP (NOFA-NE-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NJ, NY, PA, RI, VT, WV, MD, DE
- Paid organic mentor matching for vegetable, dairy, and diversified farms
- Workshops on organic vegetable production and Northeast dairy transition
- Beginning farmer certification navigation and land access support

nofane.org/topp

DID YOU KNOW? MASSACHUSETTS

Massachusetts has one of the highest per-capita organic food expenditures in the nation, driven by Boston's concentration of university students, research professionals, and high-income households. The Boston metro area is consistently ranked among the top five U.S. organic food markets. Yet Massachusetts farms supply only a small fraction of local organic demand, with most organic food shipped from California, the Midwest, and overseas. NOFA-Mass and UMass Extension are actively working to close that gap by supporting both new entrant farmers and established farms considering organic transition.

KEY SOURCES

Organic Trade Association. "Massachusetts Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

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Massachusetts Department of Agricultural Resources. "Massachusetts Organic Program." MDAR, 2025, mass.gov.

Maine

New England's organic frontier: wild blueberries, potatoes, and a pioneering small farm culture



NORTHEAST/ MID-ATLANTIC TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Maine ranks 20th nationally with 474 certified organic operations and 70,772 certified acres. Maine punches well above its size in organic agriculture, driven by wild blueberries, potatoes, and a deeply rooted organic farming culture established by MOFGA, the oldest and largest state organic organization in the country. With \$7.4M in OREI/ORG funding and University of Maine Extension, Maine is building on five decades of organic leadership.

474 CERTIFIED OPERATIONS	70,772 CERTIFIED ACRES	\$7.4M OREI / ORG FUNDING	+29% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	474 (20th nationally)
Certified organic acres	70,772
OREI / ORG funding (cumulative)	\$7.4M
Worker employment vs. conventional	+29%
Split operations	34% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic wild blueberry certification to capture the growing functional food and premium antioxidant market.
- Grow organic potato acreage in Aroostook County for the premium retail and natural food channel.
- Supply Portland's nationally recognized farm-to-table food scene with local organic vegetables and heritage grains.

TOP ORGANIC COMMODITIES

- ▶ **Wild Blueberries:** Maine grows 99% of U.S. wild blueberries; organic is growing.
- ▶ **Potatoes:** Aroostook County organic potatoes command strong retail premiums.
- ▶ **Dairy:** central Maine organic dairy farms serve regional cooperatives.
- ▶ **Vegetables & Grains:** Portland-area organic farms and artisan grain mills supply markets.

BARRIERS

- Short growing season and harsh winters limit crop diversification and extend the transition period's income risk.
- Geographic distance from major markets increases logistics costs for Maine organic producers.
- Wild blueberry organic certification requires specific land management practices that take years to implement.

KEY TAKEAWAY

Maine's organic sector is anchored by MOFGA — the oldest state organic organization in the nation — and by globally unique commodities: wild blueberries and Aroostook potatoes. The opportunity is to scale certification in both while supporting Portland's farm-to-table economy with diversified organic supply.

Resources for Farmers

Maine organic farmers are supported by MOFGA, the Maine Department of Agriculture, University of Maine Extension, and Northeast TOPP. Together they provide the nation's most established state-level organic support ecosystem, anchored by 50 years of MOFGA's farmer community.

MOFGA

FARMER ADVOCACY & CERTIFICATION

- Nation's oldest and largest state organic organization, founded in 1971
- USDA-accredited organic certifier serving Maine and Northeast producers
- Annual Common Ground Country Fair: New England's iconic organic farming event
- Beginning farmer and journey person programs: organic transition mentorship

mofga.org

Maine Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Maine Grown and Maine Quality Trademark branding for organic producers
- NRCS Maine: EQIP Organic Initiative and Transition Assistance programs
- Beginning Farmer loan programs and agricultural business development resources

maine.gov/dacf

University of Maine Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic wild blueberry, potato, vegetable, and dairy production specialists
- Aroostook County potato research station: organic potato systems field trials
- Soil health, cover crop, and IPM research for Maine's short-season organic farms
- 16-county extension network delivering statewide organic outreach

extension.umaine.edu

Northeast TOPP (NOFA-NE-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NJ, NY, PA, RI, VT, WV, MD, DE
- Paid organic mentor matching for blueberry, potato, and diversified farms
- Workshops on organic wild blueberry management and short-season production
- Beginning farmer certification and transition planning support

nofane.org/topp

DID YOU KNOW? MAINE

Maine produces 99% of the nation's wild blueberries, and wild blueberries are one of the highest-antioxidant foods ever measured. The global functional food market is driving surging demand for wild blueberries specifically, with organic wild blueberries commanding premium prices for their dual certification appeal. Yet most of Maine's wild blueberry barrens are managed conventionally. MOFGA's certification programs and UMaine Extension's organic blueberry management research are actively working to bring more of Maine's unique wild blueberry acreage into certified organic production.

KEY SOURCES

Organic Trade Association. "Maine Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Maine Department of Agriculture, Conservation and Forestry. "Maine Organic Program." DACF, 2025, maine.gov/dacf.

New Hampshire

Granite State organic farms thrive on direct markets, maple, and premium local food culture



**NORTHEAST/
MID-ATLANTIC**
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

New Hampshire ranks 36th nationally with 124 certified organic operations and 11,091 certified acres. New Hampshire's compact geography and affluent consumer base create ideal conditions for a premium organic direct-market sector. Small diversified farms, organic maple operations, vegetable and dairy producers, and farm-to-table supply chains serve Concord, Manchester, and the greater Boston metro market just south of the border. The NH Department of Agriculture and the New Hampshire Community Loan Fund support organic development through technical and financial resources.

124 CERTIFIED OPERATIONS	11,091 CERTIFIED ACRES	\$38M ORGANIC SALES	High PER-FARM REVENUE
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STATE PROFILE

AT A GLANCE

Certified operations	124 (36th nationally)
Certified organic acres	11,091
Organic sales value	\$38 million
Worker employment vs. conventional	+30%
Split operations	55% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Leverage proximity to the Boston metro market to supply premium organic produce, dairy, and value-added products to one of the Northeast's highest-spending organic consumer bases.
- Expand certified organic maple production to meet growing national and international demand for premium organic maple syrup and maple-derived ingredients.
- Develop farm-to-institution organic supply chains connecting NH producers with hospitals, universities, and schools seeking local and organic food sourcing.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** organic farms supply Concord, Manchester, and Boston metro markets.
- ▶ **Maple Syrup:** NH forests supply premium organic maple for direct and retail buyers.
- ▶ **Dairy:** CT River Valley organic dairy farms supply regional processors.
- ▶ **Fruits & Berries:** organic orchards and berry farms for premium direct market buyers.

BARRIERS

- Short growing season and rocky soils limit productive acreage and create high per-unit production costs relative to larger-scale organic operations in other regions.
- High land values in southern NH near Boston drive up input costs and limit access to farmland for beginning organic producers.
- Small farm scale and geographic fragmentation make organic aggregation and wholesale distribution logistically challenging.

KEY TAKEAWAY

New Hampshire's compact geography, affluent consumer base, and premium direct-market culture enable its organic farmers to achieve high per-farm revenues despite small scale, making it a model for high-value organic farming in the Northeast.

Resources for Farmers

New Hampshire organic farmers are supported by the NH Department of Agriculture, UNH Cooperative Extension, the NH Farm Bureau's organic programs, and the Northeast TOPP region. These partners deliver certification, technical assistance, market access, and farmer network resources across the state.

NH Department of Agriculture, Markets and Food

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- NH Made branding and marketing support for certified organic products
- NRCS New Hampshire: EQIP Organic Initiative and Organic Transition Assistance
- Specialty crop and value-added agriculture grants for organic producers

agriculture.nh.gov

UNH Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, fruit, dairy, and maple production specialists statewide
- UNH organic systems research and on-farm demonstration programs
- Soil health, cover crops, and integrated pest management for organic transition
- 10-county extension network delivering local organic technical assistance in NH

extension.unh.edu

NH Community Loan Fund

FARMER ADVOCACY & PEER LEARNING

- Farmland access loans and lease programs for beginning and organic producers
- Farm business planning and financial management support for organic operations
- Beginning farmer network and peer mentorship resources
- Connections to organic market and value-added processing opportunities

communityloanfund.org

Northeast TOPP (NOFA-NY-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NY, RI, VT
- Paid organic mentor matching for vegetable, dairy, maple, and fruit operations
- Workshops on organic transition, Northeast season extension, and certification
- Market access and farm-to-market connection resources for NH organic producers

nofany.org/topp

DID YOU KNOW? NEW HAMPSHIRE

New Hampshire's organic farms generate some of the highest per-farm revenues in the Northeast, driven by direct-market sales to affluent consumers and proximity to the greater Boston metro market. With over 8 million consumers within a 100-mile radius, New Hampshire's small organic farms have access to exceptional market depth without the infrastructure barriers facing more remote producers. UNH Extension's farm business planning resources and Northeast TOPP's mentor network help NH organic producers position their operations to fully capture this geographic premium advantage.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

New Hampshire Department of Agriculture, Markets and Food. Organic Program. NHDAMF, 2023.

UNH Cooperative Extension. Organic Agriculture Programs. UNH Extension, 2023.

NH Community Loan Fund. Farmland Access and Farmer Support Programs. NHCLF, 2023.

New York

Empire State organic powerhouse: top-five nationally, anchored by dairy, vegetables, and NYC demand



**NORTHEAST/
MID-ATLANTIC**
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

New York ranks 2nd nationally with 2,068 certified organic operations and 985,648 certified acres. New York's organic sector is one of the most robust in the nation, anchored by a world-class organic dairy industry in the North Country and Hudson Valley, intensive organic vegetable production serving New York City's 8 million residents and \$3 billion organic food market, and a growing organic grain sector in the Finger Lakes and western regions. The Northeast Organic Farming Association of New York is the nation's largest and most influential state organic farming organization.

2,068 CERTIFIED OPERATIONS	985,648 CERTIFIED ACRES	\$311M ORGANIC SALES	#5 U.S. ORGANIC RANK
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STATE PROFILE

AT A GLANCE

Certified operations	2,068 (2nd nationally)
Certified organic acres	985,648
Organic sales value	\$311 million
Worker employment vs. conventional	+29%
Split operations	54% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic grain and malt barley production to supply New York's rapidly growing craft beverage and artisan food sectors with certified New York-grown ingredients.
- Develop farm-to-institution organic supply chains connecting Hudson Valley and Finger Lakes producers with New York City school, hospital, and university buyers.
- Grow organic agritourism and direct-market capacity in the Hudson Valley and Catskills to capture maximum value from NYC proximity and tourism.

TOP ORGANIC COMMODITIES

- ▶ **Dairy:** North Country and Hudson Valley supply major organic dairy brands.
- ▶ **Vegetables & Fruits:** Hudson Valley and Long Island farms supply NYC's organic market.
- ▶ **Grains:** Finger Lakes organic grain feeds regional mills and malt houses.
- ▶ **Maple & Specialty:** Adirondacks organic maple, honey, and herbs supply premium buyers.

BARRIERS

- High land values across the state, particularly in the Hudson Valley and downstate regions, create significant barriers for beginning and expanding organic producers.
- Organic dairy processor consolidation has reduced farmgate price stability for smaller organic dairy operations in recent years.
- Cold winters and short growing seasons in northern New York require high tunnel investment and careful variety selection for vegetable producers.

KEY TAKEAWAY

New York's organic sector combines the nation's most powerful urban food market in New York City, a world-class organic dairy industry, exceptional agritourism infrastructure in the Hudson Valley, and the organizational strength of NOFA-NY to make it one of the most complete and influential organic states in the country.

Resources for Farmers

New York organic farmers are supported by the NY Department of Agriculture and Markets, Cornell Cooperative Extension, the Northeast Organic Farming Association of New York, and the Northeast TOPP region. Together they deliver a comprehensive ecosystem of certification, research, technical assistance, and market development resources.

NY Department of Agriculture and Markets

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- NY Grown and Certified program supporting organic branding and product promotion
- NRCS New York: EQIP Organic Initiative, RCPP, and Transition Assistance programs
- Farmer and Food Producer grants supporting organic market infrastructure and development

agriculture.ny.gov

Cornell Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic dairy, vegetable, grain, fruit, and maple production research and extension
- Cornell Small Farms Program and online organic farm management resources
- Hudson Valley and Finger Lakes organic market garden and grain transition support
- 62-county extension network delivering local organic technical assistance statewide

smallfarms.cornell.edu

NOFA-NY (NE Organic Farming Assoc.)

FARMER ADVOCACY & PEER LEARNING

- Nation's largest and most influential state organic farming organization
- Annual NOFA-NY Winter Conference serving 1,000+ organic farmers and stakeholders
- Organic certification cost-share navigation and producer advocacy programs
- Farmer peer networks, mentorship, and market development across New York state

nofany.org

Northeast TOPP (NOFA-NY-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NY, RI, VT
- Paid organic mentor matching for dairy, vegetable, grain, and fruit operations
- Workshops on organic transition, Northeast pest management, and certification
- Market access and NYC food hub connection resources for New York organic producers

nofany.org/topp

DID YOU KNOW? NEW YORK

New York City's organic food market is estimated at over \$3 billion annually, making it the largest single urban organic market in the United States and one of the largest in the world. This extraordinary concentration of organic purchasing power within two hours of the Hudson Valley, Long Island, and Finger Lakes farming regions creates market access conditions unmatched anywhere in American agriculture. Cornell Cooperative Extension's small farms program, NOFA-NY's farmer networks, and Northeast TOPP's mentorship infrastructure are the bridge connecting New York's organic producers to this massive opportunity.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

New York Department of Agriculture and Markets. Organic Agriculture Program. NYDAM, 2023.

Northeast Organic Farming Association of New York. NOFA-NY Programs. NOFA-NY, 2023.

Cornell Cooperative Extension. Small Farms Program. Cornell CCE, 2023.

Rhode Island

Ocean State builds premium organic sector on coastal farm culture and Providence market depth



NORTHEAST/ MID-ATLANTIC TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Rhode Island ranks 47th nationally with 48 certified organic operations and 174 certified acres. Rhode Island's organic sector is small in scale but economically robust, driven by high per-farm revenues from direct-market sales to Providence's food-forward consumer base and proximity to the greater Boston metro area. Small coastal farms, organic vegetable operations, and specialty producers supply a dense concentration of farm-to-table restaurants, farmers markets, and natural food retailers. The Rhode Island Agricultural Cooperative and University of Rhode Island Extension anchor organic technical and market support statewide.

48 CERTIFIED OPERATIONS	174 CERTIFIED ACRES	\$19M ORGANIC SALES	High PER-FARM REVENUE
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STATE PROFILE

AT A GLANCE

Certified operations	48 (47th nationally)
Certified organic acres	174
Organic sales value	\$19 million
Worker employment vs. conventional	+33%
Split operations	60% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop farm-to-restaurant organic supply chains connecting Rhode Island organic producers with Providence's nationally recognized culinary scene.
- Expand organic agritourism and direct-market operations to capture maximum value from Rhode Island's coastal tourism economy and day-trip visitor market.
- Build farm-to-school and institutional organic supply programs to connect RI organic producers with state universities, hospitals, and school districts.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** organic farms supply Providence farmers markets and CSA programs.
- ▶ **Fruits & Berries:** organic orchards and berry farms for direct market and agritourism.
- ▶ **Dairy & Eggs:** organic dairy and eggs supply regional natural grocery retailers.
- ▶ **Seafood Adjacent:** coastal organic farms supply premium Providence restaurants.

BARRIERS

- Extremely limited farmland availability and among the highest agricultural land costs in the nation constrain organic farm scale and producer entry.
- Small farm scale makes wholesale and institutional market access economically challenging without effective aggregation and food hub infrastructure.
- Short growing season and cold Atlantic winters limit vegetable production windows, requiring high tunnel investment for extended organic production.

KEY TAKEAWAY

Rhode Island's organic farms achieve exceptional per-farm revenues by directly accessing Providence's culinary culture and the broader New England premium food market, demonstrating that high-value organic production can thrive at very small scale with the right market positioning.

Resources for Farmers

Rhode Island organic farmers are supported by the RI Department of Environmental Management, University of Rhode Island Cooperative Extension, the RI Agricultural Partnership, and the Northeast TOPP region. These partners deliver certification, technical assistance, and market development resources for the state's compact but economically productive organic sector.

RI Department of Environmental Management

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- RI Division of Agriculture branding and marketing support for organic products
- NRCS Rhode Island: EQIP Organic Initiative and Organic Transition Assistance programs
- Farm viability and value-added processing grants for Rhode Island organic producers

dem.ri.gov/agriculture

URI Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, fruit, dairy, and coastal farm research and extension specialists
- URI Outreach Center organic systems research and producer education programs
- Soil health, season extension, and integrated pest management for organic producers
- Statewide extension outreach serving all Rhode Island agricultural communities

web.uri.edu/coopext

RI Agricultural Partnership

FARMER ADVOCACY & PEER LEARNING

- Rhode Island's primary farm advocacy and sustainable agriculture network
- Farmers market coordination and direct-market producer support statewide
- Farm-to-restaurant and farm-to-institution connection services in Providence
- Organic producer peer learning, mentorship, and market development resources

riagpartnership.com

Northeast TOPP (NOFA-NY-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NY, RI, VT
- Paid organic mentor matching for vegetable, fruit, dairy, and specialty operations
- Workshops on organic transition, New England season extension, and certification
- Market access and Providence food hub connections for Rhode Island organic producers

nofany.org/topp

DID YOU KNOW? RHODE ISLAND

Providence, Rhode Island is consistently ranked among the top U.S. cities for farm-to-table dining culture, with one of the highest concentrations of chef-driven restaurants per capita in the country. This culinary reputation creates extraordinary organic market demand within a very small geographic area, enabling Rhode Island's organic farms to supply premium restaurant buyers at volumes and price points that generate high per-farm revenues despite small acreage. URI Extension's farm business programs and Northeast TOPP's mentor network help Rhode Island organic producers develop the direct-to-chef and food hub relationships that maximize revenue from this unique local market.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Rhode Island Department of Environmental Management. Agriculture Division Programs. RIDEM, 2023.

University of Rhode Island Cooperative Extension. Organic Agriculture Resources. URI Extension, 2023.

Rhode Island Agricultural Partnership. Farm Programs and Resources. RIAP, 2023.

Vermont

The most organically dense state in the nation, led by dairy, maple, and diversified farms



NORTHEAST/ MID-ATLANTIC TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Vermont leads the Northeast in certified organic operations with 797 operations and 200,989 certified acres, ranking 13th nationally. Despite ranking second-smallest in land area, Vermont's organic density reflects a deep agricultural culture built by NOFA-VT, UVM Extension, and Organic Valley's cooperative infrastructure over five decades. With \$14.3M in OREI/ORG funding, Vermont punches well above its weight as a national model for state-level organic ecosystem development.

797 CERTIFIED OPERATIONS	200,989 CERTIFIED ACRES	\$14.3M OREI / ORG FUNDING	+31% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	797 (13th nationally)
Certified organic acres	200,989
OREI / ORG funding (cumulative)	\$14.3M
Worker employment vs. conventional	+31%
Split operations	38% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Build on existing dairy cooperative infrastructure to support the next generation of organic dairy transition.
- Expand organic maple certification to meet rising international and specialty channel demand.
- Connect diversified vegetable farms to institutional buyers, food hubs, and school food programs.

TOP ORGANIC COMMODITIES

- ▶ **Dairy & Milk:** Vermont organic dairy cooperatives anchor national milk supply.
- ▶ **Maple Syrup:** Vermont produces over 50% of U.S. maple; organic certification grows.
- ▶ **Vegetables:** diversified farms supply direct-to-consumer and co-op channels.
- ▶ **Apples & Orchard Crops:** Champlain Valley orchards lead Northeast organic apple expansion.

BARRIERS

- Small farm sizes limit economies of scale and make organic input sourcing and logistics costly.
- Dairy margin pressure from national commodity markets compresses the economics of organic transition.
- Aging farmer demographics and farm succession gaps put established organic operations at risk.

KEY TAKEAWAY

Vermont's organic density, 50-year NOFA-VT network, and UVM research infrastructure make it a national model. The state's critical challenge is succession and scale: keeping legacy organic farms in production and supporting the next generation of operators to access land, capital, and markets.

Resources for Farmers

Vermont organic farmers are supported by NOFA-VT, the Vermont Agency of Agriculture, University of Vermont Extension, and Northeast TOPP. Together they offer one of the nation's most integrated state-level organic support ecosystems, spanning peer mentorship, certification, technical assistance, and market access.

NOFA-VT

FARMER ADVOCACY & PEER LEARNING

- Vermont's leading organic farming organization, established 1971
- Farmer-to-farmer mentorship and peer learning networks statewide
- Annual Winter Conference, farm tours, and technical workshops
- Organic certification assistance and cost-share navigation support

nofavt.org

Vermont Agency of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Vermont Working Lands Enterprise Fund for farm business development
- Vermont Farm Viability Program: business planning and financial assistance
- Vermont Grown branding program for state-produced organic products

agriculture.vermont.gov

UVM Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Center for Sustainable Agriculture: organic research and outreach hub
- Organic dairy, vegetable, and maple production specialists
- Intervale Center partnership for beginning farmer organic training
- Soil health, compost systems, and cover crop research programs

uvm.edu/extension

Northeast TOPP (NOFA-NE-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NJ, NY, PA, RI, VT, WV, MD, DE
- Paid organic mentor matching for dairy, vegetable, and diversified farms
- Workshops on organic dairy transition, composting, and cover crops
- Beginning farmer certification navigation and transition support

nofane.org/topp

DID YOU KNOW? VERMONT

Vermont has more certified organic farms per capita than any other state in the nation. With nearly 650 organic operations serving a population of just 645,000, Vermont's organic density reflects 50 years of investment in farmer networks, university research, and consumer culture. NOFA-VT's grassroots model, UVM's Center for Sustainable Agriculture, and Organic Valley's cooperative infrastructure have created a replicable blueprint for how states can build organic ecosystems at scale. The challenge ahead is transition: ensuring Vermont's next generation of farmers can access land and capital to continue the legacy.

KEY SOURCES

Organic Trade Association. "Vermont Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Vermont Agency of Agriculture, Food & Markets. "Vermont Organic Program." VAAFM, 2025, agriculture.vermont.gov.



Appendix A: State Data Sheets

MID-ATLANTIC

Delaware

Delmarva's organic gateway building vegetable and grain supply for the DC-Baltimore-Philadelphia corridor



A FARMER'S TOOLKIT
State Module | August 2026

Delaware ranks 42nd nationally with 87 certified organic operations and 3,971 certified acres. Delaware's compact size belies its strategic position at the nexus of three major organic consumer markets: DC, Baltimore, and Philadelphia. With \$2.8M in OREI/ORG funding and University of Delaware Extension's targeted outreach, transitioning conventional grain and vegetable acres on the Delmarva Peninsula is Delaware's highest-return organic growth opportunity.

87 CERTIFIED OPERATIONS	3,971 CERTIFIED ACRES	\$2.8M OREI / ORG FUNDING	+19% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	87 (42nd nationally)
Certified organic acres	3,971
OREI / ORG funding (cumulative)	\$2.8M
Worker employment vs. conventional	+19%
Split operations	36% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Supply the DC-Baltimore-Philadelphia organic consumer corridor through short, direct supply chains.
- Transition conventional Delmarva grain acres with NRCS EQIP Organic Initiative and Northeast TOPP support.
- Develop organic vegetable supply chains for regional food hubs and Mid-Atlantic institutional buyers.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** organic market gardens supply the DC-Baltimore corridor.
- ▶ **Grains:** Delmarva organic soybeans represent a major transition opportunity.
- ▶ **Nursery & Floriculture:** organic ornamentals serve regional garden retail markets.
- ▶ **Specialty Crops:** organic sweet corn, melons, and cover crop seed produced statewide.

BARRIERS

- Conventional poultry industry dominance creates land competition and nutrient management challenges.
- Small state scale limits farmer network density and organic peer learning infrastructure.
- Multi-state certifier navigation adds administrative complexity for small Delaware operations.

KEY TAKEAWAY

Delaware's greatest organic asset is geography: no U.S. state sits closer to three simultaneous major consumer markets. Transitioning conventional Delmarva grain acres and building vegetable supply chains for DC, Baltimore, and Philadelphia food hubs represent the clearest growth pathway, with Northeast TOPP and UD Extension as the essential support infrastructure.

Resources for Farmers

Delaware organic farmers are supported by the Delaware Department of Agriculture, University of Delaware Extension, Mid-Atlantic NOFA chapters, and Northeast TOPP. Together they help farms navigate certification, access transition funding, and connect to the region's major consumer markets.

Delaware Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Delaware Agriculture Marketing: connecting farms to regional buyers
- NRCS Delaware: EQIP Organic Initiative and Transition Assistance programs
- Delaware Agricultural Museum and beginning farmer education resources

agriculture.delaware.gov

University of Delaware Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, vegetable, and cover crop production research on Delmarva
- Mid-Atlantic grain transition and soil health specialist programs
- 4-H and Farm Business Management programs for beginning farmers
- Cooperative extension offices in all three Delaware counties

extension.udel.edu

NOFA Delaware / Mid-Atlantic

FARMER ADVOCACY & PEER LEARNING

- Mid-Atlantic chapter connecting Delaware farms to the NOFA network
- Farmer-to-farmer peer learning and organic transition mentorship
- Organic certification guidance and cost-share navigation support
- Regional farm tours and workshops connecting Delmarva producers

nofavt.org

Northeast TOPP (NOFA-NE-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NJ, NY, PA, RI, VT, WV, MD, DE
- Paid organic mentor matching for grain, vegetable, and diversified farms
- Workshops on organic grain transition and cover crop integration
- Certification navigation and EQIP Organic Initiative cost-share support

nofane.org/topp

DID YOU KNOW? DELAWARE

Delaware sits within a two-hour drive of more than 15 million organic food consumers across the DC-Baltimore-Philadelphia corridor. Despite this proximity to one of the nation's most lucrative organic consumer markets, Delaware has fewer than 130 certified organic operations. Transitioning even a fraction of the state's 500,000 conventional agricultural acres to organic would create outsized economic returns. University of Delaware Extension and Northeast TOPP are actively supporting this transition, particularly for grain and vegetable operations on the Delmarva Peninsula.

KEY SOURCES

Organic Trade Association. "Delaware Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Delaware Department of Agriculture. "Delaware Organic Agriculture." DDA, 2025, agriculture.delaware.gov.

Maryland

Mid-Atlantic organic gateway serving DC and Baltimore with vegetables, grain, and Chesapeake Bay-friendly farms



A FARMER'S TOOLKIT
State Module | August 2026

Maryland ranks 30th nationally with 198 certified organic operations and 16,203 certified acres. Maryland sits at the crossroads of two of the East Coast's largest organic consumer markets: Washington DC and Baltimore. With \$5.9M in OREI/ORG funding and University of Maryland Extension's Chesapeake-focused research, Maryland is building organic supply chains that serve urban consumers while protecting the Bay through reduced-input farming.

198 CERTIFIED OPERATIONS	16,203 CERTIFIED ACRES	\$5.9M OREI / ORG FUNDING	+23% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	198 (30th nationally)
Certified organic acres	16,203
OREI / ORG funding (cumulative)	\$5.9M
Worker employment vs. conventional	+23%
Split operations	42% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Supply DC and Baltimore's combined 10 million metro consumers through local organic food hubs and direct channels.
- Transition Eastern Shore grain acres to organic, leveraging the Chesapeake Bay conservation co-benefits narrative.
- Expand organic dairy in Western Maryland to serve the Mid-Atlantic cooperative and premium fluid milk market.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** organic farms supply DC, Baltimore, and the I-95 corridor.
- ▶ **Grains:** organic corn and soybeans on the Eastern Shore supply processors.
- ▶ **Dairy:** western MD and Frederick County organic dairy serves Mid-Atlantic.
- ▶ **Nursery & Horticulture:** organic nursery and greenhouse serve DC-Baltimore metro market.

BARRIERS

- Poultry industry dominance on the Eastern Shore creates land competition and nutrient management challenges.
- High suburban land values near DC and Baltimore limit new entrant farm viability and expansion.
- Chesapeake Bay regulations add management complexity for organic farms near sensitive watershed areas.

KEY TAKEAWAY

Maryland's organic farms sit within an hour of 10 million combined DC-Baltimore consumers, creating premium market access that few states can match. Transitioning Eastern Shore grain acres and building regional food hub infrastructure are the highest-return near-term opportunities, with the Chesapeake Bay narrative as a powerful consumer story.

Resources for Farmers

Maryland organic farmers are supported by the Maryland Department of Agriculture, University of Maryland Extension, Future Harvest CASA, and Northeast TOPP. Together they deliver certification support, Chesapeake-focused research, farmer advocacy, and mentor matching for Maryland's organic sector.

Maryland Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Maryland's Best branding program for state-produced organic products
- NRCS Maryland: EQIP Organic Initiative and Chesapeake Bay conservation programs
- Beginning Farmer programs and Maryland Agricultural Finance Corporation loans

mda.maryland.gov

University of Maryland Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, grain, and dairy production specialists statewide
- Chesapeake Bay watershed organic systems and nutrient management research
- Soil health, cover crop, and IPM research for Mid-Atlantic organic farms
- 24-county extension network delivering statewide organic outreach

extension.umd.edu

Future Harvest CASA

FARMER ADVOCACY & SUSTAINABLE AGRICULTURE

- Chesapeake region's leading sustainable and organic agriculture organization
- Annual Future Harvest Conference: Mid-Atlantic's premiere organic farming event
- Farmer-to-farmer peer learning and organic transition mentorship programs
- Market development and farm-to-institution supply chain support

futureharvestcasa.org

Northeast TOPP (NOFA-NE-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NJ, NY, PA, RI, VT, WV, MD, DE
- Paid organic mentor matching for vegetable, grain, and dairy farms
- Workshops on organic Mid-Atlantic production and Chesapeake conservation systems
- Beginning farmer certification navigation and transition planning support

nofane.org/topp

DID YOU KNOW? MARYLAND

Organic farming practices directly reduce the nitrogen and phosphorus runoff that is the primary driver of Chesapeake Bay dead zones. Maryland farmers face increasing regulatory pressure to reduce nutrient runoff under the Chesapeake Bay Total Maximum Daily Load framework. Organic certification requirements align closely with Bay-friendly nutrient management: cover crops, reduced synthetic fertilizers, and buffer strip requirements are standard organic practices. This regulatory and environmental alignment makes organic transition both economically and ecologically compelling for Maryland farmers, a narrative that Future Harvest CASA and University of Maryland Extension are actively leveraging.

KEY SOURCES

Organic Trade Association. "Maryland Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Maryland Department of Agriculture. "Maryland Organic Certification Program." MDA, 2025, mda.maryland.gov.

New Jersey

Garden State organic farming leads the Northeast in per-acre value and market access



**NORTHEAST/
MID-ATLANTIC**
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

New Jersey ranks 16th nationally with 706 certified organic operations and 3,715 certified acres. New Jersey's organic sector punches well above its acreage weight, generating among the highest per-acre organic sales in the nation thanks to proximity to the New York and Philadelphia metro markets and a strong farm-to-table culture. Organic vegetables, fruits, and specialty crops supply some of the most affluent consumer markets on the East Coast. Rutgers Cooperative Extension and the Northeast Organic Farming Association of New Jersey provide robust technical and organizational support for the state's organic producers.

706 CERTIFIED OPERATIONS	3,715 CERTIFIED ACRES	\$64M ORGANIC SALES	Top 10 PER-ACRE ORGANIC VALUE
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STATE PROFILE

AT A GLANCE

Certified operations	706 (16th nationally)
Certified organic acres	3,715
Organic sales value	\$64 million
Worker employment vs. conventional	+32%
Split operations	58% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop farm-to-institution organic supply chains connecting New Jersey organic producers with New York City and Philadelphia school, hospital, and university buyers.
- Expand organic agritourism and direct-market operations to capture maximum value from New Jersey's dense and affluent consumer population.
- Invest in organic aggregation and cold storage infrastructure to help small NJ organic farms access wholesale and restaurant buyers more efficiently.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** South Jersey sandy loams supply NYC, Philly, and NJ markets.
- ▶ **Fruits & Berries:** organic blueberries, peaches, and apples at premium metro prices.
- ▶ **Herbs & Specialty Crops:** urban herb and specialty crop farms serve chefs and natural buyers.
- ▶ **Dairy & Eggs:** organic dairy and eggs supply metro-area natural grocery chains.

BARRIERS

- Extreme land price pressure near New York and Philadelphia metro areas limits farmland access for beginning and expanding organic producers.
- High operating costs including labor, land, and regulatory compliance reduce organic profit margins relative to less expensive agricultural regions.
- Agricultural land loss to development is an ongoing threat to the long-term viability of New Jersey's organic farm base.

KEY TAKEAWAY

New Jersey's extraordinary market access to the New York and Philadelphia metro areas enables its organic farmers to achieve some of the nation's highest per-farm and per-acre organic revenues, making every certified organic acre in the Garden State exceptionally productive economically.

Resources for Farmers

New Jersey organic farmers are supported by the NJ Department of Agriculture, Rutgers Cooperative Extension, the Northeast Organic Farming Association of NJ, and the Northeast TOPP region. These partners deliver certification, research, technical assistance, and market development resources for the state's high-value organic sector.

NJ Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Jersey Fresh branding program supporting certified organic product promotion
- NRCS New Jersey: EQIP Organic Initiative and Organic Transition Assistance programs
- State agricultural development grants for organic market and infrastructure projects

state.nj.us/agriculture

Rutgers Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, fruit, herb, and specialty crop research and extension specialists
- Rutgers New Jersey Agricultural Experiment Station organic systems research programs
- Soil health, integrated pest management, and season extension for organic producers
- 21-county extension network delivering local organic technical assistance across NJ

njaes.rutgers.edu

NOFA-NJ (NE Organic Farming Assoc.)

FARMER ADVOCACY & PEER LEARNING

- New Jersey's primary organic farmer advocacy and education organization
- Annual NOFA-NJ Summer Conference and farm tour programs
- Organic certification guidance, cost-share navigation, and producer support
- Farmer peer learning networks, mentorship, and market development resources

nofanj.org

Northeast TOPP (NOFA-NY-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NY, RI, VT (and NJ producers can access resources)
- Paid organic mentor matching for vegetable, fruit, and specialty crop operations
- Workshops on organic transition, Northeast pest management, and certification
- Market access and metro food hub connection resources for NJ organic producers

nofany.org/topp

DID YOU KNOW? NEW JERSEY

New Jersey organic farms generate among the highest per-acre organic sales in the United States, reflecting the extraordinary consumer market density within reach of Garden State producers. With 20 million consumers within 100 miles of the center of New Jersey, organic farmers in the state face virtually unlimited demand for premium local organic products. Rutgers Extension's organic production research and NOFA-NJ's farmer network help producers develop the high-value specialty crop and direct-market capabilities needed to fully capitalize on this unmatched market opportunity.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.
New Jersey Department of Agriculture. Organic Agriculture Program. NJDA, 2023.
Northeast Organic Farming Association of New Jersey. NOFA-NJ Programs. NOFA-NJ, 2023.
Rutgers Cooperative Extension. Organic Agriculture Research and Extension. Rutgers, 2023.

Pennsylvania

Keystone State organic powerhouse: top-ten nationally in dairy, vegetables, and grain



**NORTHEAST/
MID-ATLANTIC**
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Pennsylvania ranks 3rd nationally with 1,664 certified organic operations and 116,451 certified acres.

Pennsylvania's organic sector is one of the most commercially mature in the nation, anchored by Lancaster County's extraordinary concentration of plain community organic dairy farms, intensive organic vegetable production serving Philadelphia and Pittsburgh, and a growing organic grain and malt sector. The Pennsylvania Certified Organic program, Rodale Institute in Kutztown, and Penn State Extension provide a world-class technical, certification, and research infrastructure for the state's organic community.

1,664 CERTIFIED OPERATIONS	116,451 CERTIFIED ACRES	\$246M ORGANIC SALES	#7 U.S. ORGANIC RANK
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STATE PROFILE

AT A GLANCE

Certified operations	1,664 (3rd nationally)
Certified organic acres	116,451
Organic sales value	\$246 million
Worker employment vs. conventional	+28%
Split operations	53% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic grain and malt barley production to supply Pennsylvania's rapidly growing craft beverage and artisan food sectors with certified Pennsylvania-grown ingredients.
- Develop farm-to-institution organic supply chains connecting Lancaster County and southeastern PA organic producers with Philadelphia school, hospital, and university buyers.
- Leverage Rodale Institute's national credibility to attract organic research investment and farmer education programs that position PA as the national center of organic innovation.

TOP ORGANIC COMMODITIES

- ▶ **Dairy:** Lancaster County hosts the nation's highest organic dairy density.
- ▶ **Vegetables & Fruits:** organic farms serve Philadelphia, Pittsburgh, and Mid-Atlantic markets.
- ▶ **Grains & Malt:** central PA organic grain for regional mills and craft breweries.
- ▶ **Poultry & Eggs:** Pennsylvania is a leading organic egg producer for national retail.

BARRIERS

- High land values in southeastern Pennsylvania and the Philadelphia metro region limit farmland access for beginning organic producers.
- Organic dairy processor consolidation and farmgate price volatility create economic uncertainty for Pennsylvania's extensive plain community organic dairy sector.
- Labor availability and cost for harvest-intensive organic vegetable and fruit operations near Philadelphia and Pittsburgh are ongoing constraints.

KEY TAKEAWAY

Pennsylvania's combination of a nationally significant organic dairy sector anchored by Lancaster County plain community expertise, proximity to the Philadelphia and Pittsburgh metro markets, and the world-renowned Rodale Institute make it one of the most important organic states in the nation both economically and intellectually.

Resources for Farmers

Pennsylvania organic farmers are supported by the PA Department of Agriculture, Penn State Extension, Pennsylvania Certified Organic, the Rodale Institute, and the Northeast TOPP region. Together they deliver a comprehensive ecosystem of certification, research, technical assistance, and market development resources.

Pennsylvania Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Pennsylvania Preferred branding program supporting certified organic product promotion
- NRCS Pennsylvania: EQIP Organic Initiative, RCPP, and Organic Transition Assistance
- State agricultural development grants for organic market infrastructure and processing

agriculture.pa.gov

Penn State Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic dairy, vegetable, grain, fruit, and poultry research and extension specialists
- Penn State organic systems research and on-farm demonstration programs statewide
- Soil health, cover cropping, and integrated pest management for organic producers
- 67-county extension network delivering local organic technical assistance across PA

extension.psu.edu

Rodale Institute

FARMER ADVOCACY & PEER LEARNING

- World-renowned organic research institution based in Kutztown, Pennsylvania
- Farmer Training Program: year-long residential organic farming apprenticeship
- Longest-running U.S. side-by-side organic vs. conventional farming systems trial
- National organic advocacy, research publication, and farmer education programs

rodaleinstitute.org

Northeast TOPP (NOFA-NY-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NY, RI, VT (PA producers can access resources)
- Paid organic mentor matching for dairy, vegetable, grain, and fruit operations
- Workshops on organic transition, Northeast pest management, and certification
- Market access and Mid-Atlantic food hub connections for Pennsylvania organic producers

nofany.org/topp

DID YOU KNOW? PENNSYLVANIA

The Rodale Institute in Kutztown, Pennsylvania has been running the longest side-by-side comparison of organic and conventional farming systems in the United States since 1981, providing the scientific foundation for organic agriculture nationally. Rodale's Farming Systems Trial has produced decades of peer-reviewed research demonstrating that organic farming systems match or exceed conventional yields in the long run while building soil health, reducing input costs, and sequestering carbon. This research base, combined with Rodale's Farmer Training Program and Pennsylvania's extraordinary plain community organic dairy heritage, makes Pennsylvania the intellectual and practical capital of U.S. organic agriculture.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.
Pennsylvania Department of Agriculture. Organic Certification Program. PDA, 2023.
Rodale Institute. Annual Report and Farming Systems Trial. Rodale Institute, 2023.
Penn State Extension. Organic Agriculture Programs. Penn State, 2023.

Virginia

Old Dominion organic strength spans Shenandoah Valley grains, Chesapeake produce, and DC metro demand



A FARMER'S TOOLKIT
State Module | August 2026

Virginia ranks 24th nationally with 333 certified organic operations and 21,658 certified acres. Virginia's organic sector benefits from exceptional market depth generated by the Northern Virginia and Washington DC metro corridor, one of the wealthiest and most highly educated consumer markets in the nation. The Shenandoah Valley and Piedmont host organic grain, dairy, and livestock operations, while the Eastern Shore and tidewater regions support organic vegetable and seafood-adjacent farming. The Virginia Association for Biological Farming and Virginia Cooperative Extension provide strong technical and organizational support statewide.

333 CERTIFIED OPERATIONS	21,658 CERTIFIED ACRES	\$98M ORGANIC SALES	Top 15 U.S. ORGANIC STATE
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STATE PROFILE

AT A GLANCE

Certified operations	333 (24th nationally)
Certified organic acres	21,658
Organic sales value	\$98 million
Worker employment vs. conventional	+27%
Split operations	52% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop farm-to-institution organic supply chains connecting Virginia organic producers with Northern Virginia and DC school districts, hospitals, and federal institutions.
- Expand organic grain and flour milling capacity in the Shenandoah Valley to supply Mid-Atlantic artisan bakers and natural food retailers with Virginia-grown organic grain.
- Grow organic agritourism and direct-to-consumer sales near DC and Richmond metro areas to capture maximum value from Virginia's dense and affluent consumer base.

TOP ORGANIC COMMODITIES

- ▶ **Grains & Wheat:** Shenandoah Valley organic grains supply regional flour mills.
- ▶ **Dairy & Beef:** Valley and Piedmont organic dairy and beef supply DC area markets.
- ▶ **Vegetables & Fruits:** organic vegetable and fruit farms supply Northern Virginia markets.
- ▶ **Poultry:** organic pastured poultry serves Northern VA and DC premium buyers.

BARRIERS

- High land values near Northern Virginia and the DC metro create significant entry barriers for beginning organic producers seeking market-adjacent farmland.
- Conventional poultry integrator contracts in the Valley limit the land available for organic poultry transition and independent organic producer market access.
- Heat, humidity, and disease pressure in summer months require intensive organic pest and disease management that adds to production costs.

KEY TAKEAWAY

Virginia's proximity to the Washington DC and Northern Virginia metro, one of the nation's wealthiest and highest organic-spending consumer markets, combined with Shenandoah Valley grain and livestock heritage, creates exceptional organic production and market conditions across the state.

Resources for Farmers

Virginia organic farmers are supported by the Virginia Department of Agriculture and Consumer Services, Virginia Cooperative Extension, the Virginia Association for Biological Farming, and the Northeast TOPP region. Together they deliver certification, technical assistance, research, and market development resources statewide.

Virginia Dept of Agriculture and Consumer Services

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Virginia's Finest and Virginia Grown branding for certified organic product promotion
- NRCS Virginia: EQIP Organic Initiative, RCPP, and Organic Transition Assistance
- Agricultural development grants for organic market infrastructure and value-added processing

vdacs.virginia.gov

Virginia Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, dairy, beef, poultry, vegetable, and fruit research and extension specialists
- Virginia Tech organic systems research and on-farm demonstration programs statewide
- Soil health, cover crops, and integrated pest management for organic transition
- 107-county extension network delivering local organic technical assistance across VA

ext.vt.edu

Virginia Association for Biological Farming

FARMER ADVOCACY & PEER LEARNING

- Virginia's primary organic and biological farming advocacy and education organization
- Annual VABF Organic World Conference and farm tour programs
- Organic certification cost-share navigation and producer support programs
- Farmer peer learning networks, mentorship, and market development statewide

vabf.org

Northeast TOPP (NOFA-NY-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NY, RI, VT (VA producers access Mid-Atlantic resources)
- Paid organic mentor matching for grain, dairy, beef, and vegetable operations
- Workshops on organic transition, Mid-Atlantic pest management, and certification
- Market access and DC metro food hub connections for Virginia organic producers

nofany.org/topp

DID YOU KNOW? VIRGINIA

The Washington DC metropolitan area, including Northern Virginia, has one of the highest household incomes and organic food spending rates of any metro market in the United States. With over 6 million consumers in the DC-Northern Virginia metro area, and among the highest rates of organic food purchasing per household in the nation, Virginia organic producers within two hours of DC have access to extraordinary market depth. Virginia Cooperative Extension's organic research programs and VABF's farmer network help producers develop the direct-market and wholesale relationships that fully capture this premium geographic advantage.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Virginia Department of Agriculture and Consumer Services. Organic Program. VDACS, 2023.

Virginia Association for Biological Farming. VABF Programs. VABF, 2023.

Virginia Cooperative Extension. Organic Agriculture Resources. VCE, 2023.

West Virginia

Mountain State organic sector built on Appalachian small farms, heritage crops, and direct markets



A FARMER'S TOOLKIT
State Module | August 2026

West Virginia ranks 45th nationally with 70 certified organic operations and 35,793 certified acres. West Virginia's organic sector is emerging steadily, rooted in a strong Appalachian small-farm tradition and growing direct-market culture in Charleston, Morgantown, and the DC/Pittsburgh suburban markets adjacent to the state's eastern panhandle. The state's rugged terrain supports diverse organic vegetable, livestock, and specialty crop operations, with growing interest in organic herbs, mushrooms, and forest-farmed products. West Virginia University Extension and the West Virginia Food and Farm Coalition are the primary anchors of organic technical support.

70 CERTIFIED OPERATIONS	35,793 CERTIFIED ACRES	\$22M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE AT A GLANCE

Certified operations	70 (45th nationally)
Certified organic acres	35,793
Organic sales value	\$22 million
Worker employment vs. conventional	+24%
Split operations	47% of farms

OPPORTUNITIES & BARRIERS OPPORTUNITIES

- Develop organic forest farming and wild-harvested specialty product supply chains leveraging West Virginia's exceptional hardwood forest resources and Appalachian botanical tradition.
- Expand organic beef and livestock supply chains to serve DC and Pittsburgh suburban markets from the adjacent eastern panhandle and northern WV regions.
- Build Morgantown and Charleston organic direct-market infrastructure connecting Appalachian organic producers with university town and state capital consumer markets.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables & Herbs:** Appalachian organic vegetables and herbs supply WV urban markets.
- ▶ **Beef & Livestock:** organic and grass-fed beef and pork on Mountain State pastures.
- ▶ **Forest Products:** wild-harvested ramps, ginseng, and mushrooms for premium buyers.
- ▶ **Fruits:** organic orchards and berry farms in the Eastern Panhandle and plateau.

BARRIERS

- Rugged terrain and small farm scale make aggregation and distribution logistically challenging, limiting organic producer access to wholesale and institutional buyers.
- Limited organic processing, cold storage, and transportation infrastructure constrains market reach for organic producers in rural areas of the state.
- Economic challenges and low population density in many rural WV counties limit local direct-market opportunities, requiring longer-distance marketing strategies.

KEY TAKEAWAY

West Virginia's organic sector opportunity is anchored in its Appalachian heritage: exceptional forest farming potential, small-farm diversity, and proximity to the DC and Pittsburgh premium food markets create a distinctive organic niche that no other state occupies in quite the same way.

Resources for Farmers

West Virginia organic farmers are supported by the WV Department of Agriculture, West Virginia University Extension, the WV Food and Farm Coalition, and the Northeast TOPP region. These partners deliver certification, technical assistance, and market development resources across the state's Appalachian agricultural landscape.

West Virginia Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- WV Grown branding and marketing support for certified organic products
- NRCS West Virginia: EQIP Organic Initiative and Organic Transition Assistance programs
- Specialty crop and value-added agriculture grants for organic producers

agriculture.wv.gov

West Virginia University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, beef, fruit, and forest product research and extension specialists
- WVU small farm and Appalachian organic systems research and demonstration programs
- Soil health, cover crops, and integrated pest management for organic transition
- 55-county extension network delivering local organic technical assistance statewide

extension.wvu.edu

WV Food and Farm Coalition

FARMER ADVOCACY & PEER LEARNING

- West Virginia's primary sustainable food and farm advocacy and network organization
- Farmer peer learning, market development, and organic producer support resources
- Farm-to-school, farm-to-institution, and direct-market development programs statewide
- Beginning farmer programs and organic transition mentorship resources in WV

wvfoodandfarm.org

Northeast TOPP (NOFA-NY-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CT, MA, ME, NH, NY, RI, VT (WV producers access Mid-Atlantic resources)
- Paid organic mentor matching for vegetable, beef, fruit, and forest product operations
- Workshops on organic transition, Appalachian farm management, and certification
- Market access and DC/Pittsburgh metro food hub connections for WV organic producers

nofany.org/topp

DID YOU KNOW? WEST VIRGINIA

West Virginia's Appalachian hardwood forests contain some of the most biodiverse wild plant ecosystems in North America, including wild ramps, ginseng, and forest mushrooms that command exceptional prices in premium culinary and natural food markets. Forest farming, the intentional cultivation of specialty crops under a natural forest canopy, is a growing organic niche perfectly suited to West Virginia's terrain and botanical heritage. Certified organic forest-farmed ginseng, ramps, and specialty mushrooms can command price premiums many times higher than conventional agricultural commodities, making West Virginia's forest resources an underutilized organic economic asset.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

West Virginia Department of Agriculture. Organic Program. WVDA, 2023.

WV Food and Farm Coalition. Programs and Resources. WVFFC, 2023.

West Virginia University Extension. Organic Agriculture Resources. WVU Extension, 2023.



Appendix A: State Data Sheets

SOUTHEAST

Alabama

Growing organic sector anchored by dairy, cattle, and warm-season vegetables



SOUTHEAST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Alabama ranks 48th nationally with 38 certified organic operations and 869 certified acres. Organic dairy and cattle anchor production, while a 71% household buying rate reflects strong consumer demand. Auburn Extension, SSAWG, and USDA NRCS provide accessible support for farmers considering transition.

38 CERTIFIED OPERATIONS	869 CERTIFIED ACRES	71% HOUSEHOLDS BUY ORGANIC	28% FARMS WITH SPLIT OPERATIONS
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STATE PROFILE

AT A GLANCE

Certified operations	38 (48th nationally)
Certified organic acres	869
Household organic adoption	71%
Split operations	28% of farms
National organic market (2025)	\$76.6 billion

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Leverage Alabama's year-round warm growing season for Gulf Coast and Southeast organic markets.
- Transition cattle operations to organic systems using NRCS EQIP and Southeast TOPP mentorship.
- Build peer mentorship networks through TOPP to accelerate organic transition statewide.

TOP ORGANIC COMMODITIES

- ▶ **Milk:** small-scale farms serve regional processors and direct markets.
- ▶ **Cattle:** extensive pastureland suits low-input systems with premium appeal.
- ▶ **Tomatoes:** warm-season vegetables; organic tomatoes lead certified produce.
- ▶ **Specialty crops:** sweet potatoes, peppers, herbs, and blueberries statewide.

BARRIERS

- Small operation count limits peer network density and market aggregation capacity.
- Subtropical pest and disease pressure requires management knowledge during 3-year transition.
- Limited in-state certifiers increase logistics costs and timelines for new applicants.

KEY TAKEAWAY

Alabama's 71% household organic buying rate reflects strong demand that local production barely serves. With TOPP mentorship, NRCS support, and Auburn Extension's statewide reach, Alabama is positioned for growth anchored by cattle, vegetables, and dairy.

Resources for Farmers

Alabama's organic farmers are supported by Auburn University Extension, the Alabama Department of Agriculture, SSAWG, and USDA NRCS. Together they provide technical assistance, certification cost-share, peer learning, and market development access statewide.

Auburn University Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic production guides for vegetables, livestock, and row crops
- County-level Extension agents for on-farm consultation statewide
- Annual Sustainable Agriculture Conference and on-farm field days
- IPM resources tailored for organic transition

aces.edu

Alabama Dept of Agriculture & Industries

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Alabama Farmers Market Authority supports organic market access
- Beginning Farmer and Ranching program resources and state loans
- State inspection and licensing for organic processors

agi.alabama.gov

Southern Sustainable Ag Working Group (SSAWG)

EDUCATION & REGIONAL ADVOCACY

- Practical Farmers of the South conference, 1,000+ attendees annually
- Farmer-to-farmer network spanning 13 Southern states
- Organic transition resources, webinars, and peer connections
- Coordination with Southeast TOPP mentors for Alabama producers

ssawg.org

USDA NRCS Alabama

FUNDING & CONSERVATION PROGRAMS

- EQIP Organic Initiative: cost-share for organic transition practices
- Organic Systems Plan development from local NRCS staff
- Conservation contracts for cover crops, soil health, and pasture
- Local NRCS offices serving every Alabama county

nrcs.usda.gov/alabama

DID YOU KNOW? ALABAMA

Alabama has a 71% household organic purchasing rate, yet only 34 certified organic operations to serve that demand. That gap is a direct economic opportunity for Alabama farmers. The U.S. organic market reached \$76.6 billion in 2025, growing at 6.8%, more than double the overall food market rate. TOPP provides free peer mentorship for transitioning farmers, and EQIP cost-share can offset the financial risk of the 3-year transition period.

KEY SOURCES

Organic Trade Association. "Alabama Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Auburn University Cooperative Extension. "Sustainable Agriculture in Alabama." Auburn University, 2025, aces.edu.

Florida

Year-round growing season anchors the national organic winter vegetable and tropical fruit supply



SOUTHEAST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Florida ranks 15th nationally with 750 certified organic operations and 51,998 certified acres. Florida's frost-free growing season makes it the backbone of national organic winter supply, producing leafy greens, bell peppers, tomatoes, and cucumbers at commercial scale while rebuilding an organic citrus industry challenged by greening disease. Florida Crystals' 10,000-acre operation is the world's largest regenerative organic farm. With \$11.4M in OREI/ORG funding and UF/IFAS Extension's statewide network, the state is positioned to lead the nation in organic winter produce and specialty crop development.

750 CERTIFIED OPERATIONS	51,998 CERTIFIED ACRES	\$11.4M OREI / ORG FUNDING	+23% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE AT A GLANCE

Certified operations	750 (15th nationally)
Certified organic acres	51,998
OREI / ORG funding (cumulative)	\$11.4M
Worker employment vs. conventional	+23%
Split operations	46% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic leafy green, bell pepper, and vegetable acreage to capture national winter demand as Western drought reduces California supply.
- Rebuild organic citrus supply chains leveraging HLB-tolerant rootstock and improved organic management.
- Roughly 100,000 acres of failed citrus farmland along the Highway 27 corridor in Hardee and Highlands Counties is available at a fraction of coastal prices, offering affordable land for organic specialty crop development.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** organic winter vegetables; bell peppers are a major standout crop.
- ▶ **Leafy Greens and herbs:** organic leafy greens and herbs supply east coast markets throughout winter.
- ▶ **Citrus:** organic citrus rebuilding post-HLB with strong premium returns.
- ▶ **Sugarcane:** Florida Crystals is the world's largest regenerative organic farm.

BARRIERS

- Citrus greening (HLB) has devastated organic citrus acreage and requires intensive, costly management protocols.
- Subtropical heat and humidity elevate pest and disease pressure, increasing organic certification management complexity.
- Coastal farmland costs in counties like Broward and Hillsborough are prohibitively high, limiting organic farm viability near major markets.

KEY TAKEAWAY

Florida anchors the national organic winter supply chain for leafy greens, bell peppers, and vegetables. Florida Crystals' 10,000-acre farm is the world's largest regenerative organic operation. And nearly 100,000 acres of failed citrus land along Highway 27 in Hardee and Highlands Counties offers affordable organic expansion farmland at a fraction of coastal prices.

Resources for Farmers

Florida organic farmers are supported by Florida Organic Growers, the Florida Department of Agriculture, UF/IFAS Extension, and Southeast TOPP. Together they deliver certification services, technical assistance, transition mentorship, and market access support statewide.

Florida Organic Growers (FOG)

CERTIFICATION & FARMER ADVOCACY

- USDA-accredited organic certifier serving Florida and Southeast producers
- Leads the Southeast TOPP program for farmer mentorship and transition
- Annual Organicfest conference and organic producer networking events
- Market development and supply chain support for Florida organic farms

foginfo.org

Florida Dept of Agriculture (FDACS)

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Fresh from Florida branding program for state-produced organic products
- NRCS Florida: EQIP Organic Initiative and Transition Assistance programs
- Beginning Farmer and Rancher Development Program resources statewide

fdacs.gov

UF/IFAS Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, strawberry, citrus, and tropical fruit specialists
- HLB management and organic citrus recovery research programs
- Soil health, cover crop, and integrated pest management for organic systems
- 67-county extension network delivering organic technical assistance statewide

ifas.ufl.edu

Southeast TOPP (FOG-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AL, FL, GA, LA, MS, NC, SC, TN, and Caribbean territories
- Paid organic mentor matching for vegetable, citrus, and specialty crop farms
- Workshops on organic transition, certification, and subtropical pest management
- Beginning farmer organic market access and supply chain development support

foginfo.org/topp

DID YOU KNOW? FLORIDA

Florida is the primary source of organic leafy greens and winter vegetables for the entire eastern United States during November through April. When California slows in winter, Florida supplies the eastern U.S. with organic leafy greens, bell peppers, tomatoes, and cucumbers. Organic premiums can exceed 40% above conventional prices. Florida Crystals' 10,000-acre sugarcane operation is the world's largest regenerative organic farm. Meanwhile, approximately 100,000 acres of failed citrus land along Highway 27 in Hardee and Highlands Counties is available at far below coastal prices, offering a major organic expansion opportunity for the state.

KEY SOURCES

Organic Trade Association. "Florida Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Florida Department of Agriculture and Consumer Services. "Florida Organic Agriculture." FDACS, 2025, fdacs.gov.

Georgia

Southeast organic hub expanding through blueberries, vegetables, and Atlanta's growing consumer demand



SOUTHEAST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Georgia ranks 21st nationally with 373 certified organic operations and 22,135 certified acres. Georgia sits at the intersection of Southeast production capacity and Atlanta's rapidly growing organic consumer market. With \$7.9M in OREI/ORG funding and UGA Extension statewide reach, the state is expanding organic blueberry and vegetable supply chains while building the farm-to-institution infrastructure Atlanta's food economy demands.

373 CERTIFIED OPERATIONS	22,135 CERTIFIED ACRES	\$7.9M OREI / ORG FUNDING	+24% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	373 (21st nationally)
Certified organic acres	22,135
OREI / ORG funding (cumulative)	\$7.9M
Worker employment vs. conventional	+24%
Split operations	43% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic blueberry acreage to capture surging national demand and premium retail pricing.
- Supply Atlanta metro's growing organic consumer base through direct market and regional food hub channels.
- Develop organic pecan supply chains for the premium specialty nut, gifting, and confectionery market.

TOP ORGANIC COMMODITIES

- ▶ **Blueberries:** Georgia ranks among the top organic blueberry states nationally.
- ▶ **Vegetables:** North Georgia and coastal plain farms supply Atlanta markets.
- ▶ **Pecans:** transitioning pecan orchards as organic premiums rise nationally.
- ▶ **Cattle & Beef:** South Georgia grasslands supply Southeast regional channels.

BARRIERS

- High heat and humidity elevate pest and disease pressure, complicating organic vegetable certification.
- Limited organic processing and packing infrastructure constrains scale-up beyond direct market channels.
- Land values near Atlanta's northern suburbs limit farm expansion close to the primary consumer market.

KEY TAKEAWAY

Georgia's blueberry dominance, coastal plain acreage, and proximity to Atlanta's booming organic consumer market create a multi-tiered expansion opportunity. Southeast TOPP mentorship and UGA Extension's deep organic research presence are the key infrastructure for capturing it.

Resources for Farmers

Georgia organic farmers are supported by Georgia Organics, the Georgia Department of Agriculture, UGA Cooperative Extension, and Southeast TOPP. Together they deliver farmer advocacy, certification navigation, technical research, and market access across the state.

Georgia Organics

FARMER ADVOCACY & TECHNICAL ASSISTANCE

- Georgia's leading organic farming nonprofit, connecting farms to markets since 1997
- Farm-to-school and farm-to-institution supply chain development programs
- Annual Georgia Organics conference and statewide farm tour network
- Beginning farmer mentorship and organic certification navigation support

georgiaorganics.org

Georgia Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Georgia Grown branding program for state-produced organic products
- NRCS Georgia: EQIP Organic Initiative and Transition Assistance programs
- Beginning Farmer and Rancher development resources statewide

agr.georgia.gov

UGA Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic blueberry, vegetable, and pecan production specialists
- Coastal plain and Piedmont soil health and cover crop research
- Athens and Griffin research stations for organic systems field trials
- 159-county extension network delivering statewide organic outreach

extension.uga.edu

Southeast TOPP (FOG-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AL, FL, GA, LA, MS, NC, SC, TN, and Caribbean territories
- Paid organic mentor matching for blueberry, vegetable, and cattle farms
- Workshops on organic transition, subtropical pest management, and certification
- Market access and supply chain development for Southeast organic producers

foginfo.org/topp

DID YOU KNOW? GEORGIA

Georgia is one of the top blueberry-producing states in the nation, and organic blueberries command premiums of 50% or more above conventional prices. The Southeast's warm climate allows two to three weeks earlier harvest than Northern blueberry states, giving Georgia organic producers a market timing advantage at peak spring demand. Atlanta's population of 6.2 million makes it one of the Southeast's largest organic consumer markets, yet less than 1% of Georgia farmland is certified organic. Georgia Organics and Southeast TOPP are actively building the farmer-to-market connections needed to close that gap.

KEY SOURCES

Organic Trade Association. "Georgia Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Georgia Department of Agriculture. "Georgia Organic Agriculture." GDA, 2025, agr.georgia.gov.



Louisiana

Gulf Coast organic emerging through sugarcane transition, crawfish, and subtropical specialty crops

A FARMER'S TOOLKIT
State Module | August 2026

Louisiana ranks **46th nationally with 51 certified organic operations and 6,771 certified acres**. Louisiana's organic sector is small but growing, anchored by a subtropical climate that enables year-round production and unique crops unavailable elsewhere in the U.S. With \$3.8M in OREI/ORG funding and LSU AgCenter's statewide reach, Louisiana is building organic supply chains around sugarcane transition, specialty vegetables, and Gulf Coast aquaculture crops.

51 CERTIFIED OPERATIONS	6,771 CERTIFIED ACRES	\$3.8M OREI / ORG FUNDING	+21% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE AT A GLANCE

Certified operations	51 (46th nationally)
Certified organic acres	6,771
OREI / ORG funding (cumulative)	\$3.8M
Worker employment vs. conventional	+21%
Split operations	38% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Transition conventional sugarcane acres to organic to capture the only U.S.-grown organic cane sugar market.
- Expand organic vegetable production for New Orleans' strong farm-to-table and culinary tourism economy.
- Develop organic sweet potato and pecan supply chains for national retail and food processing buyers.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables & Herbs:** subtropical climate enables year-round organic produce.
- ▶ **Sugarcane:** Louisiana's unique sugarcane commands strong organic premiums.
- ▶ **Pecans:** organic pecan orchards supply premium gift and export markets.
- ▶ **Sweet Potatoes:** central Louisiana organic sweet potatoes supply national retail.

BARRIERS

- Extreme heat, humidity, and hurricane risk create significant pest, disease, and infrastructure challenges.
- Sugarcane transition is agronomically complex and requires multi-year planning and capital investment.
- Limited organic processing and cold chain infrastructure outside the New Orleans metro area.

KEY TAKEAWAY

Louisiana's organic opportunity is unique: it is the only U.S. state capable of producing organic sugarcane at scale, and its subtropical climate enables year-round specialty crop production. Building the processing and market infrastructure to capture organic premiums for sugarcane and specialty vegetables is the defining near-term challenge.

Resources for Farmers

Louisiana organic farmers are supported by the Louisiana Department of Agriculture, LSU AgCenter Extension, Louisiana Sustainable Agriculture Working Group, and Southeast TOPP. Together they address Louisiana's unique subtropical production context with certification, technical research, and market development.

Louisiana Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Louisiana Certified branding program for state-produced organic products
- NRCS Louisiana: EQIP Organic Initiative and Transition Assistance programs
- Agricultural Finance Authority loan programs for organic transition investment

ldaf.state.la.us

LSU AgCenter Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, sugarcane, sweet potato, and pecan production specialists
- Subtropical organic systems research at multiple LSU research stations
- Soil health, cover crop, and integrated pest management for humid Gulf Coast conditions
- 64-parish extension network delivering statewide organic outreach

lsuagcenter.com

Louisiana Sustainable Ag Working Group

FARMER ADVOCACY & PEER LEARNING

- Louisiana's sustainable and organic agriculture coalition since 1989
- Annual Louisiana Sustainable Agriculture Conference and farm tours
- Farmer-to-farmer peer learning and organic transition mentorship networks
- Organic certification guidance and cost-share navigation support

lsawg.org

Southeast TOPP (FOG-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AL, FL, GA, LA, MS, NC, SC, TN, and Caribbean territories
- Paid organic mentor matching for vegetable, sugarcane, and specialty crop farms
- Workshops on organic subtropical production and Gulf Coast pest management
- Market access and supply chain development for Southeast organic producers

foginfo.org/topp

DID YOU KNOW? LOUISIANA

Louisiana is the only U.S. state that produces commercial sugarcane, making it the sole domestic source of certified organic cane sugar. U.S. consumers spend over \$1 billion annually on organic sugar, virtually all of which is imported. Louisiana's conventional sugarcane industry processes 14-16 million tons annually, yet certified organic sugarcane acreage is minimal. The premium economics are compelling: organic raw cane sugar commands 40-60% above conventional. LSU AgCenter research on organic cane management and Southeast TOPP mentorship are beginning to make that transition viable for Louisiana producers.

KEY SOURCES

Organic Trade Association. "Louisiana Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Louisiana Department of Agriculture and Forestry. "Louisiana Organic Program." LDAF, 2025, ldaf.state.la.us.



Mississippi

Emerging southern organic sector building on warm climate and direct-market growth

Mississippi ranks 49th nationally with 28 certified organic operations and 6,640 certified acres. Mississippi's organic sector is developing steadily, driven by small diversified farms, CSA operations, and direct-market producers serving Jackson, Gulfport, and Hattiesburg. The state's warm climate and long growing season enable extended vegetable production windows and growing interest in organic sweet potatoes, pecans, and specialty crops. Mississippi State University Extension and the Mississippi Sustainable Agriculture Network are the primary anchors of organic technical support statewide.

28 CERTIFIED OPERATIONS	6,640 CERTIFIED ACRES	\$18M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE AT A GLANCE

Certified operations	28 (49th nationally)
Certified organic acres	6,640
Organic sales value	\$18 million
Worker employment vs. conventional	+22%
Split operations	41% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop organic sweet potato production as a signature Mississippi organic commodity with strong national market demand and climate-fit soils.
- Expand farmers market and CSA infrastructure in Jackson and Gulf Coast cities to absorb growing small-farm organic vegetable supply.
- Leverage Mississippi State University research capacity to build regionally specific organic production knowledge for Gulf South conditions.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** organic vegetable farms supply Jackson and coastal direct markets.
- ▶ **Sweet Potatoes:** sandy loam soils well-suited for organic sweet potato production.
- ▶ **Pecans:** organic pecan orchards tap premium nut markets statewide.
- ▶ **Poultry & Livestock:** small-scale pastured poultry and livestock statewide.

BARRIERS

- Limited local organic certification infrastructure and relatively few accredited certifiers serving rural Mississippi producers.
- Weak organic distribution and aggregation networks make it difficult for small producers to access retail and institutional buyers.
- High summer heat and humidity create pest and disease pressure that requires intensive organic management without established regional protocols.

KEY TAKEAWAY

Mississippi's long warm growing season, climate-matched organic sweet potato potential, and growing urban direct-market appetite combine to make it one of the South's most promising emerging organic states, with strong university support accelerating the transition.

Resources for Farmers

Mississippi organic farmers are supported by the Mississippi Department of Agriculture and Commerce, Mississippi State University Extension, the Mississippi Sustainable Agriculture Network, and the Southeast TOPP region. These partners provide certification, technical assistance, and market connection resources statewide.

Mississippi Dept of Agriculture and Commerce

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Mississippi Market Maker connecting organic producers with wholesale and retail buyers
- NRCS Mississippi: EQIP Organic Initiative and Organic Transition Assistance programs
- Specialty crop block grants supporting organic vegetable and fruit market development

mdac.ms.gov

Mississippi State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, small fruit, pecan, and livestock production research and extension
- Gulf South-specific pest and disease management protocols for organic systems
- Soil health and cover crop programs for organic transition on Mississippi soils
- 82-county extension network delivering local agricultural technical assistance

extension.msstate.edu

Mississippi Sustainable Agriculture Network

FARMER ADVOCACY & PEER LEARNING

- Mississippi's primary network for sustainable and organic farmer education and advocacy
- Annual Mississippi Organics Conference and farm tour programs
- Organic certification guidance and cost-share navigation for new applicants
- Farmer peer learning networks and mentorship for beginning organic producers

msan.ms

Southeast TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AL, FL, GA, LA, MS, NC, SC, PR, VI
- Paid organic mentor matching for vegetable, livestock, and specialty crop operations
- Workshops on organic transition, Gulf South pest management, and certification
- Market access and supply chain development for Mississippi organic producers

ccof.org/topp

DID YOU KNOW? MISSISSIPPI

Mississippi's southern sandy loam soils and warm climate are among the best in the nation for organic sweet potato production, a crop with consistently strong consumer demand and premium organic price premiums. With organic sweet potato sales growing at double-digit rates nationally, Mississippi farmers who transition acres to certified organic sweet potatoes gain access to premium buyers ranging from natural grocery chains to national food brands. MSU Extension's sweet potato research program and Southeast TOPP mentorship are building the knowledge base to make Mississippi a recognized organic sweet potato destination.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Mississippi Department of Agriculture and Commerce. Organic Certification Program. MDAC, 2023.

Mississippi Sustainable Agriculture Network. MSAN Programs. MSAN, 2023.

Mississippi State University Extension. Sustainable Agriculture Resources. MSU Extension, 2023.

North Carolina

Research Triangle demand and Blue Ridge mountain farms drive NC organic expansion

A FARMER'S TOOLKIT
 State Module | August 2026

North Carolina ranks 18th nationally with 554 certified organic operations and 51,063 certified acres. North Carolina's organic sector spans three distinct geographies: coastal plain vegetable and grain farms, Piedmont diversified operations, and Blue Ridge mountain specialty vegetable and small fruit producers. The Research Triangle metro area generates exceptional organic demand from one of the Southeast's most educated and food-conscious consumer bases. The Carolina Farm Stewardship Association is a regional powerhouse anchoring certification, advocacy, and farmer community across both Carolinas.

554 CERTIFIED OPERATIONS	51,063 CERTIFIED ACRES	\$112M ORGANIC SALES	Top 15 U.S. ORGANIC STATE
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STATE PROFILE AT A GLANCE

Certified operations	554 (18th nationally)
Certified organic acres	51,063
Organic sales value	\$112 million
Worker employment vs. conventional	+27%
Split operations	50% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic food hub capacity in the Research Triangle to connect Piedmont and mountain organic producers with the region's high-demand urban consumer base.
- Develop organic poultry processing infrastructure to enable North Carolina producers to capture more value from growing organic poultry demand.
- Grow the mountain organic vegetable sector by supporting season extension investments that lengthen the Blue Ridge production window.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** Blue Ridge and Piedmont farms supply major NC urban markets.
- ▶ **Poultry:** Piedmont organic pastured poultry serves regional grocery buyers.
- ▶ **Grains:** coastal plain organic grains supply Southeast feed markets.
- ▶ **Small Fruits:** organic blueberries, strawberries, and brambles at premium prices.

BARRIERS

- Organic poultry processing capacity is limited in the state, constraining the ability of organic poultry producers to scale and access premium markets.
- Coastal plain summer heat, humidity, and tropical storm risk create production challenges that require intensive organic pest and disease management.
- High competition for farmland near Research Triangle and Charlotte metro areas drives up land prices and limits organic producer access to prime market-adjacent land.

KEY TAKEAWAY

North Carolina's combination of mountain specialty crop excellence, one of the Southeast's most food-forward metro markets in the Research Triangle, and a nationally recognized organic farmer organization in CFSA makes it a model for organic sector development across the entire South.

Resources for Farmers

North Carolina organic farmers are supported by the NC Department of Agriculture and Consumer Services, NC State University Extension, the Carolina Farm Stewardship Association, and the Southeast TOPP region. Together they deliver certification, research, technical assistance, and market access programs across the state's diverse farming regions.

NC Dept of Agriculture and Consumer Services

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Got to Be NC Agriculture branding program for certified organic product promotion
- NRCS North Carolina: EQIP Organic Initiative and Organic Transition Assistance
- Specialty crop block grants supporting organic vegetable, fruit, and grain market development

ncagr.gov

NC State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, grain, poultry, and small fruit production specialists statewide
- NC State organic systems research and on-farm demonstration programs
- Soil health, cover crops, and integrated pest management for organic producers
- 100-county extension network with dedicated sustainable agriculture agents

ces.ncsu.edu

Carolina Farm Stewardship Association

FARMER ADVOCACY & PEER LEARNING

- Premier organic and sustainable agriculture organization in the Carolinas
- Annual Sustainable Agriculture Conference serving 1,000+ farmers and stakeholders
- Organic certification cost-share navigation and producer support programs
- Farmer peer networks, farm tours, and organic market development across NC and SC

carolinafarmstewards.org

Southeast TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AL, FL, GA, LA, MS, NC, SC, PR, VI
- Paid organic mentor matching for vegetable, grain, poultry, and small fruit operations
- Workshops on organic transition, Southeast pest management, and market access
- Supply chain and food hub development resources for North Carolina organic producers

ccof.org/topp

DID YOU KNOW? NORTH CAROLINA

The Raleigh-Durham-Chapel Hill Research Triangle is consistently ranked among the top U.S. metro areas for organic food spending per capita, with a highly educated tech and university workforce driving exceptional organic demand. This concentration of organic purchasing power within a two-hour drive of North Carolina's mountain and Piedmont farming regions creates one of the Southeast's most favorable farm-to-market dynamics for organic producers. The Carolina Farm Stewardship Association's annual Sustainable Agriculture Conference and NC State's organic research programs have built the farmer knowledge base and market connections needed to capture this opportunity.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.
NC Department of Agriculture and Consumer Services. NC Organic Program. NCDA&CS, 2023.
Carolina Farm Stewardship Association. CFSA Programs and Resources. CFSA, 2023.
NC State University Extension. Organic Agriculture Resources. NC State Extension, 2023.

Puerto Rico

Caribbean island builds organic resilience through tropical specialty crops and agritourism

A FARMER'S TOOLKIT
 State Module | August 2026

Puerto Rico has 13 certified organic operations across 58 certified acres, with its tropical climate supporting year-round organic production. With only 13 certified organic operations across 58 acres, Puerto Rico's certified organic sector is among the smallest in any U.S. jurisdiction — but the reasons are structural, not a reflection of agricultural potential. The island's farming economy is largely informal and subsistence-oriented, with thousands of small farms operating outside the federal certification system. High certification costs relative to farm revenue, limited English-language resources for Spanish-speaking producers, and the lingering devastation of Hurricanes Irma and Maria (2017) all suppress formal certification rates. The real organic and near-organic production footprint on the island is considerably larger than OID numbers suggest. Organic coffee, tropical fruits, vegetables, and specialty crops serve a growing local market and an expanding agritourism sector.

13	58	~\$2M	Growing
CERTIFIED OPERATIONS	CERTIFIED ACRES	EST. ORGANIC SALES	SECTOR TRAJECTORY

STATE PROFILE

AT A GLANCE

Certified operations	13 (U.S. territory)
Certified organic acres	58
Estimated organic sales	~\$2 million (small but growing)
Worker employment vs. conventional	+26%
Split operations	50% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop certified organic Puerto Rican coffee as a nationally branded premium organic specialty coffee with protected geographic identity and growing direct-to-consumer sales.
- Expand organic agritourism operations connecting mainland U.S. visitors with Puerto Rico's agricultural heritage, tropical biodiversity, and organic farm experiences.
- Build organic tropical fruit supply chains to serve mainland U.S. natural grocery buyers with certified Puerto Rico-grown mangoes, plantains, and specialty fruit.

TOP ORGANIC COMMODITIES

- ▶ **Coffee:** mountain organic coffee commands strong national and global demand.
- ▶ **Tropical Fruits:** organic tropical fruits supply local markets and mainland buyers.
- ▶ **Vegetables:** organic vegetable farms supply local markets and farm-to-table.
- ▶ **Cacao & Specialty:** emerging organic cacao for premium chocolate and specialty buyers.

BARRIERS

- Hurricane and extreme weather risk creates ongoing production and infrastructure vulnerability for organic producers across the island.
- Limited organic processing and cold storage infrastructure constrains market reach for organic crops beyond direct-market channels.
- High cost of organic inputs, equipment, and certification relative to farm revenue creates economic barriers for small-scale organic producers.

KEY TAKEAWAY

Puerto Rico's 13 certified organic operations represent only the formally certified tip of a much larger organic and near-organic farming tradition. Structural barriers — high certification costs, language access, and hurricane recovery — suppress official counts. TOPP and USDA programs targeting cost-share and technical assistance in Spanish are the most direct levers for growing Puerto Rico's certified organic sector.

Resources for Farmers

Puerto Rico organic farmers are supported by the Puerto Rico Department of Agriculture, Universidad de Puerto Rico Agricultural Extension Service, the Puerto Rico Organic Agriculture Alliance, and the Southeast TOPP region. These partners deliver certification, technical assistance, and market development resources across the island.

Puerto Rico Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- PR Organic Program certification and regulatory oversight for island producers
- NRCS Puerto Rico: EQIP Organic Initiative and Organic Transition Assistance programs
- Agricultural recovery and resilience grants for organic producers post-hurricane

agricultura.pr.gov

UPR Agricultural Extension Service

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic coffee, tropical fruit, vegetable, and cacao research and extension specialists
- UPR Mayaguez and UPR Rio Piedras organic systems research programs
- Soil health, tropical pest management, and organic transition resources statewide
- Island-wide extension network delivering local organic technical assistance in PR

sea.uprm.edu

Puerto Rico Organic Agriculture Alliance

FARMER ADVOCACY & PEER LEARNING

- Puerto Rico's primary organic farmer advocacy and education network
- Organic certification guidance, cost-share navigation, and producer support
- Farmer peer learning, market development, and organic agritourism programs
- Post-hurricane organic farm resilience and recovery resources

prorganica.org

Southeast TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AL, FL, GA, LA, MS, NC, SC, PR, VI
- Paid organic mentor matching for coffee, tropical fruit, vegetable, and cacao operations
- Workshops on organic transition, tropical production, and certification in Puerto Rico
- Market access and mainland U.S. organic buyer connections for Puerto Rico producers

ccof.org/topp

DID YOU KNOW? PUERTO RICO

Puerto Rican mountain-grown coffee has historically commanded some of the highest prices of any U.S.-origin coffee, with beans from the central cordillera recognized by specialty coffee buyers as among the finest in the Caribbean. Certified organic Puerto Rican coffee adds a premium layer to this already distinguished regional identity. With the specialty and organic coffee market growing internationally, PR organic coffee producers who achieve certification gain access to premium buyers seeking certified origin coffee from a distinctive and historic growing region. UPR Extension's coffee research and Southeast TOPP's mentorship are actively supporting Puerto Rico producers in making this transition.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Puerto Rico Department of Agriculture. Organic Certification Program. PRDA, 2023.

Puerto Rico Organic Agriculture Alliance. Programs and Resources. PROAA, 2023.

Universidad de Puerto Rico Agricultural Extension Service. Organic Programs. UPR AES, 2023.

South Carolina

Palmetto State organic growth driven by Lowcountry produce, tea, and Charleston food culture



SOUTHEAST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

South Carolina ranks 38th nationally with 117 certified organic operations and 6,387 certified acres. South Carolina's organic sector is emerging strongly, anchored by the state's warm climate enabling year-round vegetable production, the explosive growth of Charleston's farm-to-table restaurant and tourism scene, and the unique Lowcountry agricultural heritage that includes heritage grain crops, organic tea, and diversified coastal plain farms. The Carolina Farm Stewardship Association and Clemson University Extension provide strong technical and organizational support for the state's organic producers.

117 CERTIFIED OPERATIONS	6,387 CERTIFIED ACRES	\$41M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE AT A GLANCE

Certified operations	117 (38th nationally)
Certified organic acres	6,387
Organic sales value	\$41 million
Worker employment vs. conventional	+26%
Split operations	49% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop farm-to-restaurant organic supply chains in Charleston, one of the South's most celebrated food and tourism destinations, creating premium market access for SC organic producers.
- Revive and certify Lowcountry heritage grain crops as organic specialty products with distinctive culinary identity and national premium food market appeal.
- Expand organic vegetable production capacity to supply growing demand from Greenville and Columbia metro areas and the state's rapidly expanding tourism economy.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** organic farms supply Charleston, Columbia, and Greenville markets.
- ▶ **Tea:** the Charleston Tea Garden is America's only commercial tea farm.
- ▶ **Heritage Grains:** Carolina Gold and heritage grains are being revived organically.
- ▶ **Fruits & Peaches:** SC peach heritage includes transitioning organic orchards.

BARRIERS

- Summer heat, humidity, and hurricane risk create significant production challenges and weather-related losses for organic producers, particularly during the three-year transition period.
- Limited organic cold storage and distribution infrastructure constrains market access for perishable organic crops in rural South Carolina.
- High conventional agricultural land prices in coastal and Upstate regions near growing cities limit organic farmland access for beginning producers.

KEY TAKEAWAY

South Carolina's organic sector is positioned for strong growth driven by Charleston's booming food tourism economy, the Lowcountry's unique agricultural heritage crops, and year-round growing conditions that enable high vegetable production volumes unavailable in colder states.

Resources for Farmers

South Carolina organic farmers are supported by the SC Department of Agriculture, Clemson University Extension, the Carolina Farm Stewardship Association, and the Southeast TOPP region. These organizations deliver certification, technical assistance, market connection, and farmer advocacy resources across the state.

South Carolina Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- SC Certified Grown branding and marketing program for certified organic products
- NRCS South Carolina: EQIP Organic Initiative and Organic Transition Assistance
- Specialty crop block grants supporting organic vegetable, fruit, and grain market development

agriculture.sc.gov

Clemson University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, peach, grain, and specialty crop research and extension specialists
- Clemson organic systems research and Lowcountry heritage crop restoration programs
- Soil health, cover crops, and integrated pest management for organic transition
- 46-county extension network delivering local organic technical assistance statewide

clemson.edu/extension

Carolina Farm Stewardship Association

FARMER ADVOCACY & PEER LEARNING

- Premier organic and sustainable agriculture organization in the Carolinas
- Annual Sustainable Agriculture Conference serving 1,000+ farmers and stakeholders
- Organic certification cost-share navigation and producer support programs
- Farmer peer networks, farm tours, and organic market development across NC and SC

carolinafarmstewards.org

Southeast TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AL, FL, GA, LA, MS, NC, SC, PR, VI
- Paid organic mentor matching for vegetable, fruit, grain, and specialty operations
- Workshops on organic transition, Lowcountry production, and certification
- Market access and Charleston food hub connections for South Carolina organic producers

ccof.org/topp

DID YOU KNOW? SOUTH CAROLINA

Charleston, South Carolina is consistently ranked among the top U.S. cities for culinary tourism, with its farm-to-table restaurant culture and celebrated food festivals attracting millions of food-focused visitors annually. This concentration of premium restaurant, hotel, and culinary tourism spending in Charleston creates exceptional organic market demand within reach of South Carolina's organic farms. Clemson Extension's specialty crop research and CFSA's farmer network are helping SC organic producers build the supply chain relationships with Charleston chefs and buyers that generate the premium revenues needed to make organic certification economically compelling.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

South Carolina Department of Agriculture. Organic Program. SCDA, 2023.

Carolina Farm Stewardship Association. CFSA Programs. CFSA, 2023.

Clemson University Extension. Organic Agriculture Resources. Clemson Extension, 2023.

U.S. Virgin Islands

Caribbean territory builds organic capacity through tropical fruits, tourism, and island food sovereignty

A FARMER'S TOOLKIT
 State Module | August 2026

The U.S. Virgin Islands has 1 certified organic operation, reflecting an emerging organic sector with significant growth potential. With just 1 certified organic operation and 14 certified acres, the U.S. Virgin Islands has the smallest certified organic footprint of any U.S. jurisdiction — a figure that reflects structural constraints, not a lack of agricultural potential. The USVI imports more than 80% of its food, leaving extremely limited arable land under cultivation of any kind. Hurricanes Irma and Maria (2017) delivered catastrophic back-to-back blows to the territory's small farming sector, destroying infrastructure and displacing agricultural investment for years. The real opportunity lies in the islands' thriving tourism economy: resort buyers pay premium prices for locally grown Caribbean produce, and organic certification could unlock those markets for producers who rebuild. TOPP engagement in the USVI would need to begin with basic infrastructure — cost-share, Spanish and English outreach, and on-island technical assistance.

1	14	Data Limited	Emerging
CERTIFIED OPERATIONS	CERTIFIED ACRES	ORGANIC SALES DATA	SECTOR TRAJECTORY

STATE PROFILE

AT A GLANCE

Certified operations	1 (U.S. territory)
Certified organic acres	14
Organic sales data	Not reported (territory data limited)
Primary challenge	80%+ food imports; limited arable land
Primary opportunity	Tourism economy premium local demand

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop farm-to-resort organic supply chains on St. Thomas and St. John, leveraging the territory's multi-billion dollar tourism economy as a premium organic buyer.
- Expand organic vegetable and tropical fruit production on St. Croix's relatively flat agricultural land to reduce the territory's high food import dependence.
- Build USVI organic agritourism experiences connecting visitors with the islands' agricultural heritage, tropical biodiversity, and authentic Caribbean food culture.

TOP ORGANIC COMMODITIES

- ▶ **Tropical Fruits:** organic mangoes, papayas, and bananas supply local and resort buyers.
- ▶ **Vegetables:** St. Croix organic vegetables supply direct markets and resort buyers.
- ▶ **Herbs & Specialty:** organic culinary herbs and specialty crops supply USVI restaurants.
- ▶ **Root Crops:** organic sweet potatoes and root crops supply local food markets.

BARRIERS

- Severe hurricane risk and the 2017 experience of Hurricanes Irma and Maria devastated agricultural infrastructure, creating ongoing vulnerability for organic producers.
- Very limited arable land constrains organic farm scale and total production potential across all three main islands.
- High cost of organic inputs, equipment, and shipping creates economic barriers that are significantly higher than mainland U.S. agricultural operations.

KEY TAKEAWAY

The U.S. Virgin Islands' single certified organic operation is not a measure of interest or potential — it is a measure of how many structural barriers remain: hurricane devastation, 80%+ food import dependence, extremely limited arable land, and minimal USDA certification infrastructure. The tourism economy creates real premium-market demand for local organic produce, making TOPP cost-share and technical assistance the highest-leverage entry points for growing the USVI certified sector.

Resources for Farmers

USVI organic farmers are supported by the Virgin Islands Department of Agriculture, University of the Virgin Islands Agricultural Experiment Station, the USVI Farmers in Action organization, and the Southeast TOPP region. These partners deliver certification, technical assistance, and market development resources across the territory.

VI Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- VIDA organic program certification oversight and producer support
- NRCS USVI: EQIP Organic Initiative and Organic Transition Assistance programs
- Agricultural recovery and food sovereignty grants for USVI organic producers

vifresh.com

UVI Agricultural Experiment Station

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic tropical fruit, vegetable, and root crop research and extension for the USVI
- UVI aquaponics and sustainable agriculture research and demonstration programs
- Tropical soil health, pest management, and hurricane recovery resources for organic producers
- Island-wide extension outreach serving all USVI agricultural communities

uvi.edu/research/agricultural-experiment-station

USVI Farmers in Action

FARMER ADVOCACY & PEER LEARNING

- Primary USVI farmer advocacy and sustainable agriculture education network
- Farmer peer learning, market development, and organic producer support programs
- Farm-to-resort and direct-market connection services across the territory
- Post-hurricane organic farm resilience and agricultural recovery resources

farmersinaction.org

Southeast TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AL, FL, GA, LA, MS, NC, SC, PR, VI
- Paid organic mentor matching for tropical fruit, vegetable, and root crop operations
- Workshops on organic transition, Caribbean production, and certification in USVI
- Market access and mainland U.S. organic buyer connections for USVI producers

ccof.org/topp

DID YOU KNOW? U.S. VIRGIN ISLANDS

The U.S. Virgin Islands imports approximately 80% of its food, making local organic agriculture a critical food sovereignty and economic resilience priority for the territory's 100,000 residents. Every pound of food grown organically on St. Croix, St. Thomas, or St. John reduces both the islands' dependence on imported food and the vulnerability created by supply chain disruptions during hurricanes and other crises. UVI's agricultural research and Southeast TOPP's mentorship programs are actively supporting USVI organic producers in building the local food production capacity that underpins both economic resilience and food security for the territory.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Virgin Islands Department of Agriculture. Organic Program. VIDA, 2023.

University of the Virgin Islands. Agricultural Experiment Station Programs. UVI AES, 2023.

USVI Farmers in Action. Programs and Resources. FIA, 2023.



Appendix A: State Data Sheets

MIDWEST

Arkansas

8th nationally for organic animal sales, anchored by eggs, chickens, and sweet potatoes



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Arkansas ranks **29th nationally with 220 certified organic operations and 21,624 certified acres**. With 179 certified operations across 21,624 acres and a 67% worker employment premium over conventional farms, Arkansas's organic sector punches above its weight in the Midwest.

220 CERTIFIED OPERATIONS	21,624 CERTIFIED ACRES	\$48M ORGANIC ANIMAL SALES	+67% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	220 (29th nationally)
Certified organic acres	21,624
Organic animal sales (2021)	\$48M (8th nationally)
Household organic adoption	73%
Worker employment vs. conventional	+67%

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic poultry and egg production by transitioning integrator operations with TOPP support.
- Grow organic vegetable production for regional wholesale channels using the long growing season.
- Develop value-added organic processing capacity to capture more farmgate value in-state.
- Increase organic soybean acreage to support in-state organic poultry industry.

TOP ORGANIC COMMODITIES

- ▶ **Eggs:** top state organic commodity; national brands through integrators.
- ▶ **Chickens:** organic poultry leverages integrator infrastructure statewide.
- ▶ **Tomatoes:** warm-season vegetables; organic tomatoes are a growth area.
- ▶ **Specialty crops:** peppers, lettuce, sweet potatoes, blueberries, spring brassicas round out the organic mix.

BARRIERS

- Organic feed grain availability; 75-80% of organic soybeans are imported, pressuring costs.
- Integrator contract structures limit flexibility for transitioning poultry farmers.
- Limited organic certifiers and technical assistance providers across the state's geography.

KEY TAKEAWAY

Arkansas's 8th-place national ranking in organic animal sales, combined with a favorable growing climate and Midwest TOPP mentorship, makes it well-positioned to scale organic poultry production and expand into value-added organic processing.

Resources for Farmers

Arkansas organic farmers are served by the University of Arkansas Cooperative Extension, Midwest TOPP, Heifer International, and the Arkansas Department of Agriculture. Together they provide technical guidance, certification navigation, and market development statewide.

U of Arkansas Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic agriculture specialist for poultry, vegetables, and row crops
- On-farm research comparing organic and conventional systems
- County-level agent network across all 75 Arkansas counties
- Workshops on organic transition, certification, and markets

uaex.uada.edu

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for transitioning farms
- Field days on agronomy, certification, and business planning
- Marbleseed Farmer-to-Farmer Mentorship Program in AR

mosaorganic.org/topp

Arkansas Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through
- Market Development Division for Arkansas organic products
- Beginning Farmer and Rancher program resources
- Specialty Crop Block Grant Program

agriculture.arkansas.gov

Heifer International

TRAINING, MENTORSHIP & MARKET ACCESS

- Based in Little Rock; organic and sustainable farming programs
- Heifer USA supports farmer cooperatives and market linkages
- Technical assistance for livestock-based organic transitions
- Value chain development and cooperative business training

heifer.org

DID YOU KNOW? ARKANSAS

Arkansas, Indiana, and Kentucky each report \$40M or more in organic animal product sales, collectively anchoring a major regional demand corridor for organic feed grains. Yet the U.S. still imports 75-80% of its organic soybeans annually. Arkansas's grain infrastructure and poultry integrator networks make it strategically positioned to expand domestic organic feed grain supply and reduce national import dependence.

KEY SOURCES

Organic Trade Association. "Arkansas Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

University of Arkansas Cooperative Extension. "Arkansas Organic Agriculture." UADA, 2025, uaex.uada.edu.

Iowa

The nation's largest corn and soy state pivoting organic grain production to close the domestic feed gap



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Iowa ranks 9th nationally with 907 certified organic operations and 197,192 certified acres. Iowa's organic grain sector is at the center of the national organic feed shortage: the U.S. imports 75-80% of its organic soybeans, and Iowa's conventional grain infrastructure is uniquely positioned to close that gap. With \$12.6M in OREI/ORG funding and Practical Farmers of Iowa's deep farmer network, Iowa is the single most important state for organic grain transition in the country.

907 CERTIFIED OPERATIONS	197,192 CERTIFIED ACRES	\$12.6M OREI / ORG FUNDING	+27% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	907 (9th nationally)
Certified organic acres	197,192
OREI / ORG funding (cumulative)	\$12.6M
Worker employment vs. conventional	+27%
Split operations	58% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Transition conventional corn-soy acres to close the national organic feed grain shortage and reduce imports.
- Build organic grain aggregation and processing infrastructure to serve Midwest organic livestock producers.
- Expand organic dairy operations leveraging the state's strong cooperative infrastructure and feed grain base.

TOP ORGANIC COMMODITIES

- ▶ **Soybeans:** Iowa leads growth in closing the organic soy import gap.
- ▶ **Corn:** organic corn anchors Midwest dairy and poultry supply chains.
- ▶ **Oats & Small Grains:** organic oats for cereal, food processing, and cover crop seed.
- ▶ **Dairy:** northeast Iowa organic dairy leverages cooperative infrastructure.

BARRIERS

- GMO pollen drift from Iowa's dense conventional corn and soy acres threatens organic grain certification.
- High cash rent prices driven by conventional commodity markets compress organic transition economics.
- Three-year transition period with income risk requires accessible bridge financing and cost-share support.

KEY TAKEAWAY

Iowa is ground zero for the national organic feed grain shortage. Its 58% split-operation rate and nearly 300,000 certified acres demonstrate genuine scale, but the conversion of even a fraction of Iowa's 23 million conventional corn-soy acres would transform the national organic supply chain. Practical Farmers of Iowa and Midwest TOPP are the essential catalysts.

Resources for Farmers

Iowa organic farmers are supported by Practical Farmers of Iowa, the Iowa Department of Agriculture, Iowa State University Extension, and Midwest TOPP. Together they deliver farmer-led research, transition cost-share, mentor matching, and market access for Iowa's organic grain and dairy sector.

Practical Farmers of Iowa

FARMER-LED RESEARCH & PEER LEARNING

- Iowa's leading sustainable and organic farmer research organization
- Farmer-to-farmer trials and knowledge sharing on organic grain systems
- Beginning farmer programs and organic transition peer learning networks
- Annual conference and field day program across organic grain and dairy topics

practicalfarmers.org

Iowa Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Iowa Certified Organic program and state organic registry
- NRCS Iowa: EQIP Organic Initiative and Transition Assistance programs
- Beginning Farmer Loan Program and agricultural development resources

iowaagriculture.gov

Iowa State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, dairy, and vegetable production specialists statewide
- Neely-Kinyon Long-Term Agroecological Research site for organic systems
- Organic Farmer Network and statewide farmer resource portal
- Cover crop, soil health, and crop rotation research for organic transition

extension.iastate.edu

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for grain, dairy, and diversified farms
- Workshops on organic corn-soy transition and cover crop integration
- Market access support for organic grain and dairy supply chains

mosaorganic.org/topp

DID YOU KNOW? IOWA

The United States imports 75-80% of its organic soybeans, and Iowa grows more conventional soybeans than any other state. This is the central paradox of U.S. organic agriculture: the nation's most productive soybean state exports conventional soybeans while importing organic soybeans from overseas. Transitioning a fraction of Iowa's 10 million soybean acres to organic would eliminate the import gap entirely. Practical Farmers of Iowa and ISU Extension are actively demonstrating that the agronomics and economics work; the primary barrier is the three-year transition period and access to bridge financing.

KEY SOURCES

Organic Trade Association. "Iowa Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Iowa Department of Agriculture and Land Stewardship. "Iowa Organic Program." IDALS, 2025, iowaagriculture.gov.

Illinois

Chicago metro demand and vast corn-soy acreage position Illinois as a Midwest organic conversion leader



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Illinois ranks 11th nationally with 843 certified organic operations and 150,154 certified acres. Illinois pairs some of the nation's most productive farmland with experienced grain farmers, strong agricultural research, and unmatched transportation and processing infrastructure. Much of the organic grain grown here already moves into national supply chains — feeding organic livestock, processors, and food manufacturers across the country rather than being consumed locally. With \$10.8M in OREI/ORG funding and 26 million acres of conventional corn and soy, Illinois is one of the highest-leverage organic grain conversion opportunities in American agriculture.

843 CERTIFIED OPERATIONS	150,154 CERTIFIED ACRES	\$10.8M OREI / ORG FUNDING	+26% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE AT A GLANCE

Certified operations	843 (11th nationally)
Certified organic acres	150,154
OREI / ORG funding (cumulative)	\$10.8M
Worker employment vs. conventional	+26%
Split operations	54% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Transition Illinois corn and soybean acres — including experienced non-GMO grain operations — to organic to supply national feed and food-grade grain markets and reduce import dependence.
- Build out the aggregation, processing, and marketing infrastructure for food-grade organic grain, which hasn't kept pace with farmer interest.
- Develop specialty-crop supply near population centers, backed by professional-scale food hubs that can serve institutions such as schools, hospitals, and universities.

TOP ORGANIC COMMODITIES

- ▶ **Soybeans:** Illinois scale addresses the national organic soy import gap.
- ▶ **Corn:** organic corn anchors Midwest organic dairy and poultry chains.
- ▶ **Vegetables:** diversified farms near Chicago supply co-ops and CSA channels.
- ▶ **Small Grains:** organic wheat, oats, and spelt for the artisan grain market.

BARRIERS

- GMO contamination risk from neighboring conventional farms is a persistent organic grain certification threat.
- High cash rent driven by corn-soy commodity prices compresses the economics of organic grain transition.
- Limited organic grain aggregation and elevator infrastructure outside of established cooperative channels.
- Limited dedicated organic technical assistance in the state leaves transitioning farmers without readily available agronomic support.

KEY TAKEAWAY

Illinois combines the Midwest's most productive corn-soy farmland with experienced farmers, deep research capacity, and national-scale transportation and processing. The organic grain conversion opportunity is enormous: transitioning even 2% of Illinois corn-soy acres would add over 500,000 certified acres to national food and feed supply chains. Building out food-grade grain processing and dedicated organic technical assistance is the essential infrastructure for making that transition happen.

Resources for Farmers

Illinois organic farmers are supported by the Illinois Department of Agriculture, the Illinois Stewardship Alliance, The Land Connection, and University of Illinois Extension. Together they deliver certification support, organic grain training and mentorship, farmer advocacy, land access, and market development statewide.

Illinois Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Illinois Certified Organic program and state organic producer registry
- NRCS Illinois: EQIP Organic Initiative and Transition Assistance programs
- Illinois Agricultural Loan Program supporting organic transition financing

agr.illinois.gov

U of I Extension

RESEARCH & GENERAL AG PROGRAMMING

- Strong crop research and general agricultural programming statewide
- Crop Sciences research and on-farm trial networks
- Soil health, cover crop, and integrated weed management resources
- Dedicated organic-specific technical assistance is currently limited

extension.illinois.edu

Illinois Stewardship Alliance

FARMER ADVOCACY & POLICY

- Illinois's leading sustainable and organic agriculture advocacy organization
- Organic and sustainable farmer policy advocacy at the state level
- Annual Prairie Fest conference connecting organic farmers and consumers
- Beginning farmer resources and organic market development support

ilstewards.org

The Land Connection

ORGANIC GRAIN TRAINING & FARMER SUPPORT

- Organic Grain Conference: the Midwest's grain-focused organic gathering
- Organic Grain Mentorship Program pairing new and experienced growers
- Beginning farmer training and grant opportunities
- Land access and organic transition assistance across Illinois

thelandconnection.org

DID YOU KNOW? ILLINOIS

Most of the organic grain grown in Illinois never stays in Illinois — it moves into national supply chains that feed organic livestock, processors, and food manufacturers across the country. That national reach is Illinois's real organic advantage: productive farmland, experienced grain farmers, and transportation and processing infrastructure that few states can match. The gap is downstream — food-grade grain aggregation, processing, and dedicated organic technical assistance haven't kept pace with farmer interest. Organizations like The Land Connection are building that missing infrastructure through grain-focused training, mentorship, and market development.

KEY SOURCES

Organic Trade Association. "Illinois Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Illinois Department of Agriculture. "Illinois Organic Certification Program." IDOA, 2025, agr.illinois.gov.

Indiana

Midwest grain and dairy state building organic infrastructure at the crossroads of Midwest supply chains



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Indiana ranks 7th nationally with 1,028 certified organic operations and 97,045 certified acres. Indiana's organic sector is emerging from the shadows of its dominant conventional corn-soy identity. With \$8.4M in OREI/ORG funding and Purdue Extension's statewide network, Indiana is building organic grain, dairy, and vegetable supply chains that serve both Indianapolis's growing consumer market and Midwest regional food processors.

1,028 CERTIFIED OPERATIONS	97,045 CERTIFIED ACRES	\$8.4M OREI / ORG FUNDING	+22% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE AT A GLANCE

Certified operations	1,028 (7th nationally)
Certified organic acres	97,045
OREI / ORG funding (cumulative)	\$8.4M
Worker employment vs. conventional	+22%
Split operations	49% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Transition conventional grain acres to supply Midwest organic feed and food processing demand.
- Expand organic dairy leveraging northern Indiana's existing dairy infrastructure and cooperative networks.
- Supply Indianapolis metro's growing organic consumer market through regional food hubs and direct channels.

TOP ORGANIC COMMODITIES

- ▶ **Soybeans & Corn:** Indiana's largest organic category is feed grain production.
- ▶ **Dairy:** northern Indiana serves Midwest cooperative organic milk supply.
- ▶ **Vegetables:** organic vegetable farms near Indianapolis supply CSAs and markets.
- ▶ **Poultry & Eggs:** organic eggs leverage Indiana's poultry and feed grain base.

BARRIERS

- GMO drift and contamination risk from dense conventional corn-soy acres creates organic grain certification risk.
- Limited organic grain elevator and aggregation infrastructure outside of established cooperative networks.
- Conventional poultry contract dominance creates competition for land and transition-period income support.

KEY TAKEAWAY

Indiana's organic sector is at an inflection point: 49% split operations and nearly 190,000 certified acres show the sector is real and growing, but the transition of Indiana's vast conventional corn-soy acres represents a transformative opportunity. Midwest TOPP mentorship and Purdue Extension's organic research are the critical catalysts.

Resources for Farmers

Indiana organic farmers are supported by the Indiana State Department of Agriculture, Purdue Extension, Indiana Certified Organic, and Midwest TOPP. Together they deliver state certification resources, production research, farmer peer networks, and market development support.

Indiana State Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Indiana Grown branding program for state-produced organic products
- NRCS Indiana: EQIP Organic Initiative and Transition Assistance programs
- Beginning Farmer programs and agricultural development loan resources

in.gov/isda

Purdue Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, dairy, vegetable, and poultry production specialists
- Throckmorton Purdue Agricultural Center: organic systems field research
- Soil health, cover crop, and weed management research for organic transition
- 92-county extension network delivering statewide organic outreach

extension.purdue.edu

Indiana Certified Organic

CERTIFICATION & FARMER NETWORKS

- Indiana-based USDA-accredited organic certifier serving Midwest producers
- Certification services for grain, dairy, vegetable, and livestock operations
- Farmer network and educational events for Indiana organic producers
- Organic transition planning and certification guidance support

indianacertifiedorganic.com

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for grain, dairy, and diversified farms
- Workshops on organic grain transition, cover crops, and dairy conversion
- Market access support for organic grain, dairy, and vegetable operations

mosaorganic.org/topp

DID YOU KNOW? INDIANA

Indiana is one of the top poultry-producing states in the country, and organic poultry and eggs command premiums of 100% or more above conventional prices. Indiana's established poultry processing infrastructure and organic grain production base create a natural synergy for organic poultry and egg expansion. Organic eggs and chicken are among the fastest-growing organic categories nationally. Midwest TOPP mentorship connects Indiana grain farmers with organic poultry and dairy operators who need local feed supply, creating integrated organic supply chains within the state.

KEY SOURCES

Organic Trade Association. "Indiana Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Indiana State Department of Agriculture. "Indiana Organic Agriculture." ISDA, 2025, in.gov/isda.

Kentucky

Tobacco transition country pivoting to organic vegetables, grains, and diversified farm systems



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Kentucky ranks 28th nationally with 251 certified organic operations and 19,435 certified acres. Kentucky's organic sector is being shaped by the generational transition away from tobacco: farms that built their identity on high-value specialty crops are finding organic vegetables, herbs, and grains to be a compelling alternative. With \$7.1M in OREI/ORG funding and UK Extension's statewide network, Kentucky is building on its small-farm tradition to develop one of the South's most diverse organic sectors.

251 CERTIFIED OPERATIONS	19,435 CERTIFIED ACRES	\$7.1M OREI / ORG FUNDING	+26% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	251 (28th nationally)
Certified organic acres	19,435
OREI / ORG funding (cumulative)	\$7.1M
Worker employment vs. conventional	+26%
Split operations	48% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Support tobacco-exiting farmers transitioning to high-value organic vegetables and herbs using existing skills.
- Expand organic grain production to supply Midwest feed demand and reduce national organic import dependence.
- Develop organic beef and dairy supply chains leveraging Kentucky's extensive pasture and hay infrastructure.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables & Herbs:** organic vegetables and herbs on former tobacco farmland.
- ▶ **Grains:** organic corn, soybeans, and wheat for Midwest feed demand.
- ▶ **Cattle & Beef:** organic grass-fed beef on Kentucky's productive pastures.
- ▶ **Dairy:** organic dairy in central and eastern Kentucky serves cooperatives.

BARRIERS

- Former tobacco infrastructure is not directly transferable, requiring new equipment and market relationships.
- Limited organic processing and distribution infrastructure for vegetables and specialty crops outside metro areas.
- High conventional cash crop rental rates pressure organic transition economics, especially during the 3-year period.

KEY TAKEAWAY

Kentucky's tobacco transition creates a unique organic opportunity: thousands of experienced small-farm operators with high-value crop expertise and flexible infrastructure are actively seeking alternatives. Midwest TOPP mentorship and UK Extension's tobacco-to-organic transition programming are the direct bridge for this generational farm shift.

Resources for Farmers

Kentucky organic farmers are supported by the Kentucky Department of Agriculture, University of Kentucky Extension, Kentucky Organic Farmers Association, and Midwest TOPP. Together they address the state's unique tobacco transition context with tailored certification, technical assistance, and market development.

Kentucky Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Kentucky Proud branding program for state-produced organic products
- NRCS Kentucky: EQIP Organic Initiative and Transition Assistance programs
- Agricultural Development Board funding for tobacco transition enterprises

kyagr.com

University of Kentucky Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, grain, beef, and herb production specialists statewide
- Tobacco to alternative crops transition research and demonstration programs
- Soil health, cover crop, and integrated pest management for organic systems
- 120-county extension network delivering statewide organic outreach

extension.ca.uky.edu

Kentucky Organic Farmers Assoc.

FARMER ADVOCACY & PEER LEARNING

- Kentucky's primary organic farmer advocacy and networking organization
- Annual conference and farm tour program connecting organic producers
- Organic certification guidance and cost-share navigation support
- Farmer-to-farmer peer learning and organic transition mentorship

kyorganicfarmers.org

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for vegetable, grain, and beef operations
- Workshops on organic transition from tobacco and diversified farm systems
- Market access and supply chain support for Kentucky organic producers

mosaorganic.org/topp

DID YOU KNOW? KENTUCKY

Kentucky lost over 90% of its tobacco acreage since the federal tobacco buyout in 2004, leaving thousands of small farm operators actively searching for high-value alternative crops. Organic vegetables, herbs, and specialty grains match the high-value, small-acreage, intensive-management profile that Kentucky tobacco farmers have cultivated for generations. UK Extension's tobacco-to-organic transition research and Midwest TOPP's mentorship programs are actively connecting this experienced farmer base with organic markets, making Kentucky one of the Southeast's most promising organic expansion states.

KEY SOURCES

Organic Trade Association. "Kentucky Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Kentucky Department of Agriculture. "Kentucky Organic Program." KDA, 2025, kyagr.com.

Michigan

Great Lakes State leads in organic blueberries, dairy, and diverse specialty crops



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Michigan ranks 14th nationally with 785 certified organic operations and 159,396 certified acres. Michigan's fruit belt along Lake Michigan's eastern shore is one of the densest concentrations of organic tree fruit and blueberry production in the country. The state pairs this specialty crop strength with robust organic dairy in the Lower Peninsula and strong direct-market infrastructure anchored by Detroit's Eastern Market and a statewide network of farmers markets and food co-ops.

785 CERTIFIED OPERATIONS	159,396 CERTIFIED ACRES	\$272M ORGANIC SALES	#9 U.S. ORGANIC SALES RANK
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STATE PROFILE AT A GLANCE

Certified operations	785 (14th nationally)
Certified organic acres	159,396
Organic sales value	\$272 million
Worker employment vs. conventional	+28%
Split operations	52% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic blueberry and tree fruit processing capacity to capture more value from the Great Lakes fruit belt harvest.
- Grow organic dairy supply chain infrastructure to meet rising Midwest and national demand for organic milk and dairy products.
- Connect southeast Michigan urban consumers with regional organic producers through food hub and direct-market channel development.

TOP ORGANIC COMMODITIES

- ▶ **Blueberries:** Michigan is the top U.S. organic blueberry state; ideal climate.
- ▶ **Tree Fruit:** organic apples, cherries, and peaches from the fruit belt.
- ▶ **Dairy:** over 150 certified organic dairy farms supply regional processors.
- ▶ **Vegetables:** organic vegetable farms serve Eastern Market and a dense CSA base.

BARRIERS

- High land values in the Lake Michigan fruit belt create barriers to entry for beginning organic fruit producers.
- Organic dairy processing bottlenecks limit on-farm value capture and can constrain price premiums for new organic dairy entrants.
- Cold winters and short growing seasons limit vegetable production windows, requiring high tunnel and season-extension investment.

KEY TAKEAWAY

Michigan's combination of the nation's top organic blueberry belt, a strong organic dairy sector, and major urban direct markets makes it one of the Midwest's most complete and commercially sophisticated organic states.

Resources for Farmers

Michigan organic farmers are supported by the Michigan Department of Agriculture and Rural Development, Michigan State University Extension, the Michigan Organic Food and Farm Alliance, and the Great Lakes Midwest TOPP region. Together they deliver certification, technical assistance, research, and market access across the state's diverse agriculture.

Michigan Dept of Agriculture and Rural Dev.

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Michigan Cottage Food Law and value-added processing support for organic producers
- NRCS Michigan: EQIP Organic Initiative, RCPP, and Transition Assistance programs
- Michigan Agricultural Development grants for organic market and infrastructure projects

michigan.gov/mdard

Michigan State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic blueberry, tree fruit, vegetable, and dairy production specialists statewide
- MSU Organic Farming Research program and on-farm organic systems trials
- Soil health, integrated pest management, and cover crop support for organic transition
- County extension agents across all 83 Michigan counties providing local organic support

canr.msu.edu/organic

Michigan Organic Food and Farm Alliance

FARMER ADVOCACY & PEER LEARNING

- Michigan's primary organic producer advocacy and networking organization
- Annual Michigan Organic Conference connecting producers, researchers, and buyers
- Organic certification cost-share navigation and new entrant support
- Farmer-to-farmer peer learning and organic market development programs

moffa.net

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for blueberry, fruit, dairy, and vegetable operations
- Workshops on organic transition economics, market access, and certification
- Supply chain development for Michigan organic producers entering retail and wholesale

mosaorganic.org/topp

DID YOU KNOW? MICHIGAN

Michigan produces more organic blueberries than any other state in the U.S., with the Lake Michigan shoreline's sandy soils and lake-moderated climate creating near-perfect growing conditions. The same geography that made southwest Michigan the nation's conventional blueberry capital has proven equally exceptional for organic production, with dozens of certified organic operations supplying national retailers, local food co-ops, and direct-to-consumer channels. MSU Extension's organic blueberry research program and MOFFA's producer networks have been central to building this organic fruit belt into a national model.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Michigan Department of Agriculture and Rural Development. Michigan Organic Program. MDARD, 2023.

Michigan Organic Food and Farm Alliance. MOFFA Annual Report. MOFFA, 2023.

Michigan State University Extension. Organic Agriculture Programs. MSU Extension, 2023.

Minnesota

10th nationally for operations, anchored by milk, corn, and soybeans



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Minnesota ranks 10th nationally with 852 certified organic operations and 217,315 certified acres. State farms hire 25% more workers than conventional counterparts. With \$16.5M in OREI/ORG funding and deep cooperative infrastructure, Minnesota sits at the crossroads of organic dairy demand and the national feed grain shortage.

852 CERTIFIED OPERATIONS	217,315 CERTIFIED ACRES	\$16.5M OREI / ORG FUNDING	+25% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	852 (10th nationally)
Certified organic acres	217,315
OREI / ORG funding (cumulative)	\$16.5M
Worker employment vs. conventional	+25%
Split operations	51% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Scale organic grain production to address the national feed grain shortage and reduce import dependence.
- Leverage cooperative infrastructure and the networks of the Land Stewardship Project, Sustainable Farming Association of Minnesota, Renewing the Countryside, and other sustainability NGOs to expand organic dairy.
- Expand organic vegetable supply across the 11-county Twin Cities metro by building on The Good Acre food hub's infrastructure and its relationships with Hmong and other immigrant farmers, paired with added technical-assistance capacity.

TOP ORGANIC COMMODITIES

- ▶ **Milk:** co-op infrastructure anchors regional and national supply chains.
- ▶ **Corn:** primary organic feed crop for growing domestic demand.
- ▶ **Soybeans:** strong premiums; 75-80% of U.S. organic soy is imported.
- ▶ **Specialty crops & vegetables:** Twin Cities farms serve food co-ops and CSA channels.

BARRIERS

- GMO pollen and herbicide drift from conventional neighbors threaten organic grain certification and cause crop damage during the 3-year transition.
- Transition-period cash flow is often negative for dairy operations, which must buy in organic feed while still selling milk at conventional prices.
- Thin market liquidity and price discovery for organic small grains can leave that crop revenue-neutral or negative for growers.
- The expansion of mega-dairies in greater Minnesota (e.g., Riverview) intensifies consolidation pressure on the pasture-based organic dairy model.

KEY TAKEAWAY

Minnesota's 10th-place ranking, deep dairy co-op infrastructure, and \$16.5M in OREI/ORG investment position it as a strategic Midwest organic anchor. Feed grain expansion is the single largest near-term opportunity in the state.

Resources for Farmers

Minnesota's organic farmers are backed by an unusually deep bench of support: farmer-led nonprofits such as the Land Stewardship Project, the Sustainable Farming Association of Minnesota, and Renewing the Countryside; the University of Minnesota's Extension and its Institute for Sustainable Agriculture (MISA); the Minnesota Department of Agriculture; and Midwest TOPP. Together they cover the full path from transition and certification through funding, technical assistance, and market access.

Land Stewardship Project

FARMER ADVOCACY & PEER LEARNING

- Leading sustainable and organic farmer advocacy organization in MN
- Farmer-to-farmer peer learning and organic transition support
- Farmland access and beginning farmer programs
- Policy advocacy for organic agriculture statewide and nationally

landstewardshipproject.org

Minnesota Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- MDA Organic Advisory Task Force for state policy input
- Minnesota Grown branding for state-produced organic products
- Beginning Farmer Tax Credit and farmland access resources

mda.state.mn.us

University of Minnesota Extension & MISA

RESEARCH, TEACHING & TECHNICAL ASSISTANCE

- Organic grain, dairy, and vegetable production specialists
- FINBIN farm-financial benchmarks for evaluating organic and transition economics (finbin.umn.edu)
- 11 UMN courses spanning organic livestock, crops, food systems, and marketing
- Annual Minnesota Organic Conference (co-hosted with MDA)

extension.umn.edu

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for transitioning farms
- Workshops on grain, dairy, and vegetable organic systems
- Marbleseed Farmer-to-Farmer Mentorship Program in MN

mosaorganic.org/topp

DID YOU KNOW? MINNESOTA

Minnesota's 51% split-operation rate means half of all certified farms already manage both organic and conventional fields simultaneously. That makes Minnesota one of the Midwest's largest ready-to-transition pools. TOPP mentorship and EQIP Organic Initiative cost-share make the economics of full conversion compelling for this cohort. Minnesota's \$16.5M in OREI/ORG funding has built one of the nation's strongest organic agronomy knowledge bases to support them.

KEY SOURCES

Organic Trade Association. "Minnesota Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Minnesota Department of Agriculture. "Minnesota Organic Program." MDA, 2025, mda.state.mn.us.

Missouri

Gateway state bridges organic grain, Ozark livestock, and two booming metro markets



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Missouri ranks 17th nationally with 684 certified organic operations and 62,157 certified acres. Missouri's organic sector runs from the fertile grain plains of the north, through the diversified Ozark Highlands livestock country, to robust direct-market scenes in Kansas City and St. Louis. The state's position at the crossroads of the Midwest grain belt and the Southeast livestock tradition gives it unusual commodity breadth, supported by strong farmer advocacy through the Missouri Rural Crisis Center and growing organic processor interest.

684 CERTIFIED OPERATIONS	62,157 CERTIFIED ACRES	\$97M ORGANIC SALES	Top 20 U.S. ORGANIC STATE
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STATE PROFILE AT A GLANCE

Certified operations	684 (17th nationally)
Certified organic acres	62,157
Organic sales value	\$97 million
Worker employment vs. conventional	+24%
Split operations	46% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop organic grain aggregation and storage infrastructure to supply Midwest organic processors and reduce dependence on imports.
- Expand Ozark organic beef and pork supply chains to reach Kansas City and St. Louis premium food markets more efficiently.
- Build regional food hub capacity to connect rural organic producers with urban consumers in both major Missouri metro areas.

TOP ORGANIC COMMODITIES

- ▶ **Soybeans & Corn:** northern MO loam soils suit organic grain production.
- ▶ **Beef Cattle:** Ozark pastures support certified organic and grass-fed beef.
- ▶ **Poultry:** organic pastured poultry serves KC and St. Louis metro markets.
- ▶ **Vegetables & Fruits:** KC and St. Louis farms supply farmers markets and CSAs.

BARRIERS

- Conventional commodity grain infrastructure and cash rental market create economic pressure against organic grain transition.
- Rural processing and cold storage gaps in the Ozarks limit perishable organic product market reach.
- Long distances between Ozark farm clusters and metro markets increase distribution costs for small organic livestock producers.

KEY TAKEAWAY

Missouri's breadth of organic production from northern grain plains through Ozark livestock country to two major metro direct markets gives it a diversified organic sector that is resilient, growing, and well-positioned to supply national processors and regional consumers alike.

Resources for Farmers

Missouri organic farmers are supported by the Missouri Department of Agriculture, University of Missouri Extension, the Missouri Rural Crisis Center, and Midwest TOPP. These organizations deliver technical assistance, certification support, and market development resources across the state's varied agricultural landscape.

Missouri Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Missouri Grown branding and marketing support for certified organic products
- NRCS Missouri: EQIP Organic Initiative and Organic Transition Assistance
- Value-added agriculture grants supporting organic processing and market development

mda.mo.gov

University of Missouri Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, beef, poultry, and vegetable production specialists statewide
- MU Center for Agroforestry supporting organic and sustainable multi-crop systems
- Soil health, cover cropping, and integrated pest management for organic producers
- 114-county extension network delivering local organic technical assistance

extension.missouri.edu

Missouri Rural Crisis Center

FARMER ADVOCACY & PEER LEARNING

- Missouri's leading farm advocacy organization with deep organic and sustainable roots
- Farmer-to-farmer peer learning and organic transition support networks
- Policy advocacy for organic and sustainable agriculture at state and federal levels
- Annual conference and educational events connecting organic producers statewide

morural.org

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for grain, beef, poultry, and vegetable operations
- Workshops on organic transition, certification, and market development in Missouri
- Supply chain and food hub connection services for Missouri organic producers

mosaorganic.org/topp

DID YOU KNOW? MISSOURI

Missouri sits at a unique crossroads where Great Plains grain agriculture, Ozark livestock traditions, and two of the Midwest's most food-forward metro markets all converge within a single state. This geographic diversity means Missouri organic farmers range from large-scale grain operations in the north to small-scale Ozark diversified farms to intensive urban-edge market gardens near Kansas City and St. Louis. The result is one of the broadest organic commodity mixes in the Midwest, with strong growth potential in both grain supply chains and metro direct markets.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Missouri Department of Agriculture. Organic Agriculture Programs. MDA, 2023.

Missouri Rural Crisis Center. Organic and Sustainable Agriculture Resources. MRCC, 2023.

University of Missouri Extension. Sustainable Agriculture Programs. MU Extension, 2023.

Ohio

Buckeye State leads Midwest organic dairy and vegetable production with major metro market access



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Ohio ranks 8th nationally with 1,008 certified organic operations and 116,565 certified acres. Ohio's organic sector is anchored by one of the Midwest's strongest organic dairy concentrations in the northeast and east-central regions, where Ohio Amish and plain community farms have been early adopters of organic certification. Strong direct-market infrastructure in Columbus, Cleveland, and Cincinnati, combined with Ohio State University's robust organic research programs, make Ohio a leading Midwest organic state with diverse commodity and market strengths.

1,008 CERTIFIED OPERATIONS	116,565 CERTIFIED ACRES	\$197M ORGANIC SALES	#9 U.S. ORGANIC RANK
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STATE PROFILE

AT A GLANCE

Certified operations	1,008 (8th nationally)
Certified organic acres	116,565
Organic sales value	\$197 million
Worker employment vs. conventional	+26%
Split operations	51% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic grain and feed aggregation infrastructure to supply Ohio's large organic dairy and poultry sectors with locally grown certified organic feed.
- Develop farm-to-institution organic supply chains connecting Ohio producers with Columbus, Cleveland, and Cincinnati school, hospital, and university buyers.
- Build on plain community organic farming expertise by developing Amish and Mennonite farmer networks and mentorship pipelines for organic transition support.

TOP ORGANIC COMMODITIES

- ▶ **Dairy:** Amish-operated certified organic dairy dominates northeast Ohio.
- ▶ **Vegetables:** organic market gardens supply Columbus, Cleveland, and Cincinnati.
- ▶ **Grains & Soybeans:** Ohio organic grains and soybeans supply Midwest feed mills.
- ▶ **Poultry & Eggs:** Ohio is a leading organic egg producer for national retail chains.

BARRIERS

- High conventional grain prices and cash rental rates in central Ohio create economic pressure against organic grain transition in productive Corn Belt areas.
- Organic dairy processor consolidation has created farmgate price volatility for Ohio's dairy farmers, complicating the economics of organic dairy expansion.
- Heavy spring and fall precipitation can complicate organic field management timing, particularly for cover crop establishment and organic grain harvest.

KEY TAKEAWAY

Ohio's combination of a nationally significant organic dairy sector anchored by plain community expertise, three major metro direct markets, and strong university organic research makes it one of the Midwest's most commercially sophisticated and organizationally well-supported organic states.

Resources for Farmers

Ohio organic farmers are supported by the Ohio Department of Agriculture, Ohio State University Extension, the Ohio Ecological Food and Farm Association, and the Midwest TOPP region. These organizations deliver certification, research, technical assistance, and market development resources across the state.

Ohio Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Ohio Proud branding and marketing support for certified organic products
- NRCS Ohio: EQIP Organic Initiative and Organic Transition Assistance programs
- Agricultural development grants supporting organic processing and market infrastructure

agri.ohio.gov

Ohio State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic dairy, vegetable, grain, and poultry production research and extension specialists
- OSU organic systems research and on-farm demonstration programs statewide
- Soil health, cover cropping, and integrated pest management for organic producers
- 88-county extension network with sustainable agriculture specialists across Ohio

cfaes.osu.edu/extension

Ohio Ecological Food and Farm Association

FARMER ADVOCACY & PEER LEARNING

- Ohio's primary organic and ecological farming advocacy and education organization
- Annual OEFFA Conference serving 800+ organic farmers and sustainable agriculture stakeholders
- Organic certification cost-share navigation and producer support programs
- Farmer peer learning networks, mentorship, and organic market development resources

oeffa.org

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for dairy, grain, vegetable, and poultry operations
- Workshops on organic transition, plain community farm support, and certification
- Market access and food hub connection resources for Ohio organic producers

mosaorganic.org/topp

DID YOU KNOW? OHIO

Ohio's Amish and plain community farmers have been among the earliest and most successful adopters of certified organic dairy practices in the Midwest, creating a culturally distinctive organic dairy cluster in the state's northeast region. Plain community values of land stewardship, diversified farming, and community self-reliance align naturally with organic production principles, and many Amish and Mennonite farms transitioned to certified organic well before conventional market pressures made it economically compelling. This plain community organic heritage gives Ohio a unique and deep-rooted organic dairy expertise that Midwest TOPP and OEFFA are actively connecting to new generations of organic producers.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Ohio Department of Agriculture. Organic Certification Program. ODA, 2023.

Ohio Ecological Food and Farm Association. OEFFA Programs. OEFFA, 2023.

Ohio State University Extension. Organic Agriculture Resources. OSU Extension, 2023.

Tennessee

Volunteer State organic growth spans tobacco-exiting farms, Appalachian produce, and Nashville markets



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Tennessee ranks 37th nationally with 119 certified organic operations and 5,338 certified acres. Tennessee's organic sector shares characteristics with its neighbor Kentucky in benefiting from the generational tobacco exit, with small farms transitioning to organic vegetables, herbs, and livestock across middle and eastern Tennessee. The Nashville metro area's explosive growth has created one of the Southeast's fastest-expanding premium organic food markets. Appalachian mountain farms in the east supply premium specialty vegetables and herbs, while the Tennessee Department of Agriculture's PickTN program supports direct-market access statewide.

119 CERTIFIED OPERATIONS	5,338 CERTIFIED ACRES	\$52M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE

AT A GLANCE

Certified operations	119 (37th nationally)
Certified organic acres	5,338
Organic sales value	\$52 million
Worker employment vs. conventional	+25%
Split operations	48% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop organic farm-to-restaurant and direct-to-consumer supply chains in Nashville, one of the South's fastest-growing metro areas with a booming food and beverage scene.
- Support tobacco-exiting farmers transitioning to organic vegetables, herbs, and livestock using existing small-farm skills and infrastructure.
- Expand organic produce and specialty crop production in east Tennessee to supply Knoxville, Asheville, and regional premium food markets.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables & Herbs:** organic farms supply Nashville, Knoxville, and Chattanooga markets.
- ▶ **Beef & Livestock:** pasture-rich counties support organic and grass-fed beef and pork.
- ▶ **Dairy:** middle Tennessee certified organic dairy serves regional co-ops.
- ▶ **Fruits & Berries:** Appalachian organic orchards and berry farms for premium buyers.

BARRIERS

- Former tobacco farm infrastructure requires retooling and new market relationships for organic vegetable and herb production alternatives.
- Hot, humid summers create significant pest and disease pressure requiring intensive organic management without well-established regional protocols.
- Limited organic cold storage and distribution infrastructure constrains small organic producer access to Nashville and other metro wholesale buyers.

KEY TAKEAWAY

Tennessee's combination of tobacco-transition farm expertise, three growing metro direct markets in Nashville, Knoxville, and Chattanooga, and Appalachian mountain growing conditions for premium specialty crops gives its organic sector strong and diverse growth potential across the state.

Resources for Farmers

Tennessee organic farmers are supported by the Tennessee Department of Agriculture, University of Tennessee Extension, the Tennessee Organic Growers Association, and the Midwest TOPP region. These partners deliver certification, technical assistance, market development, and farmer network resources statewide.

Tennessee Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- PickTN branding and direct-market support program for certified organic products
- NRCS Tennessee: EQIP Organic Initiative and Organic Transition Assistance programs
- Agricultural development grants supporting organic market infrastructure and value-added processing

tn.gov/agriculture

University of Tennessee Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, beef, dairy, fruit, and tobacco-alternative production specialists
- UT organic systems research and on-farm demonstration programs statewide
- Soil health, cover crops, and integrated pest management for organic transition
- 95-county extension network delivering local organic technical assistance across TN

extension.tennessee.edu

Tennessee Organic Growers Association

FARMER ADVOCACY & PEER LEARNING

- Tennessee's primary organic producer advocacy and peer learning network
- Annual TOGA conference and farm tour programs connecting organic producers
- Organic certification guidance and cost-share navigation for producers
- Farmer peer learning networks and market development for organic producers statewide

tnorganic.org

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for vegetable, beef, dairy, and fruit operations
- Workshops on organic tobacco transition, Southeast pest management, and certification
- Market access and Nashville food hub connections for Tennessee organic producers

mosaorganic.org/topp

DID YOU KNOW? TENNESSEE

Nashville's metropolitan area has been the fastest-growing large city in the United States for several consecutive years, generating one of the South's most rapidly expanding premium organic food markets.

The Nashville metro's influx of tech workers, healthcare professionals, and tourism visitors has created extraordinary demand for farm-to-table dining, organic grocery options, and premium food experiences.

Tennessee organic producers within a two-hour drive of Nashville are positioned to supply this high-growth market. UT Extension's farmer resources and Midwest TOPP's mentorship network are the bridge connecting Tennessee's transitioning farms with Nashville's booming organic appetite.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Tennessee Department of Agriculture. Organic Certification Program. TDA, 2023.

Tennessee Organic Growers Association. TOGA Programs. TOGA, 2023.

University of Tennessee Extension. Organic Agriculture Programs. UT Extension, 2023.

Wisconsin

Badger State leads Midwest organic dairy with 900+ certified farms and strong cooperative tradition



MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Wisconsin ranks 4th nationally with 1,617 certified organic operations and 241,080 certified acres. Wisconsin is the dominant Midwest organic dairy state and one of the nation's top three organic states overall. Its concentration of certified organic dairy farms is unmatched in the region, anchored by the Coulee Region, Door Peninsula, and central Wisconsin landscapes that have built organic dairy as a cornerstone of rural farm family economics. The Midwest Organic and Sustainable Education Service (MOSES) is headquartered in Wisconsin and serves as the organizational heart of Midwest organic agriculture.

1,617 CERTIFIED OPERATIONS	241,080 CERTIFIED ACRES	\$335M ORGANIC SALES	#3 U.S. ORGANIC RANK
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STATE PROFILE

AT A GLANCE

Certified operations	1,617 (4th nationally)
Certified organic acres	241,080
Organic sales value	\$335 million
Worker employment vs. conventional	+27%
Split operations	52% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic feed grain production to reduce Wisconsin organic dairy farms' dependence on imported organic feed, keeping more organic value within the state.
- Develop organic vegetable and specialty crop supply chains connecting Wisconsin producers with Milwaukee, Madison, and Green Bay institutional and wholesale buyers.
- Grow organic ginseng and specialty crop production as high-value diversification options for Wisconsin organic farms seeking revenue beyond dairy.

TOP ORGANIC COMMODITIES

- ▶ **Dairy:** Wisconsin is the top Midwest organic dairy state supplying co-ops.
- ▶ **Grains & Corn:** organic corn, oats, and grain on Wisconsin soils supply dairy feed.
- ▶ **Vegetables:** organic vegetable farms in Madison and Milwaukee serve strong markets.
- ▶ **Fruits & Ginseng:** organic orchards, berry farms, and ginseng supply specialty buyers.

BARRIERS

- Organic dairy farmgate price volatility and processor consolidation have created economic uncertainty for Wisconsin organic dairy farmers in recent years.
- High organic feed grain prices due to insufficient domestic organic grain supply increase costs for Wisconsin organic dairy operations.
- Cold winters and relatively short growing seasons limit organic vegetable production windows and increase season extension infrastructure costs.

KEY TAKEAWAY

Wisconsin's organic dairy leadership is national in scope and economic significance: the CROPP Cooperative alone represents hundreds of Wisconsin farm families, and MOSES's annual Organic Farming Conference in La Crosse is the largest organic farming event in the Midwest. Wisconsin is the organizational and dairy production center of American organic agriculture.

Resources for Farmers

Wisconsin organic farmers are supported by the Wisconsin Department of Agriculture, Trade and Consumer Protection, University of Wisconsin Extension, the Midwest Organic and Sustainable Education Service, and the Midwest TOPP region. These organizations deliver a world-class ecosystem of certification, research, technical assistance, and market development resources.

WI Dept of Agriculture, Trade and Consumer Protection

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Wisconsin Grown and Buy Local, Buy Wisconsin branding for organic product promotion
- NRCS Wisconsin: EQIP Organic Initiative, RCPP, and Organic Transition Assistance
- Agricultural development grants supporting organic dairy, grain, and market infrastructure

datcp.wi.gov

University of Wisconsin Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic dairy, grain, vegetable, fruit, and ginseng research and extension specialists
- UW organic systems research and on-farm demonstration programs statewide
- Soil health, cover crops, and integrated pest management for organic producers
- 72-county extension network delivering local organic technical assistance across WI

extension.wisc.edu

MOSES (Midwest Organic and Sustainable Ed. Svc.)

FARMER ADVOCACY & PEER LEARNING

- Hosts the nation's largest organic farming conference annually in La Crosse, WI
- Organic farmer education, peer networking, and technical resources for the Midwest
- Organic certification guidance, cost-share navigation, and producer support
- Farmer peer learning networks and mentorship programs across Wisconsin and the Midwest

mosesorganic.org

Midwest TOPP (MOSA-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AR, IL, IN, IA, KY, MI, MN, MO, OH, TN, WI
- Paid organic mentor matching for dairy, grain, vegetable, and fruit operations
- Workshops on organic transition, dairy management, and certification in Wisconsin
- Market access and supply chain development for Wisconsin organic producers

mosaorganic.org/topp

DID YOU KNOW? WISCONSIN

The MOSES Organic Farming Conference held annually in La Crosse, Wisconsin attracts over 3,500 organic farmers, researchers, and advocates, making it the largest organic farming gathering in the United States.

This extraordinary annual convergence of organic expertise in Wisconsin reflects the state's role as the organizational center of Midwest organic agriculture. The conference provides Wisconsin's and the region's organic producers with cutting-edge research presentations, hands-on workshops, peer networking, and market connections that accelerate organic adoption and success across the Midwest.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Wisconsin Department of Agriculture, Trade and Consumer Protection. Organic Program. DATCP, 2023.

Midwest Organic and Sustainable Education Service. MOSES Annual Report. MOSES, 2023.

University of Wisconsin Extension. Organic Agriculture Resources. UW Extension, 2023.

Find additional resources at:
organictransition.org/region/national

Wolf & Associates
THE ORGANIC SPECIALISTS



NATIONAL
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM





Appendix A: State Data Sheets

CENTRAL PLAINS

Colorado

Front Range produce, Eastern Plains grain, and Rocky Mountain organic ranching



A FARMER'S TOOLKIT
State Module | August 2026

Colorado ranks 19th nationally with 522 certified organic operations and 261,563 certified acres. The Front Range corridor anchors consumer demand from Denver and Boulder while Eastern Plains grain farms represent a vast transition opportunity. With \$8.2M in OREI/ORG funding and Colorado State University's statewide extension network, Colorado bridges high-altitude specialty crops with large-scale dryland grain and organic beef production.

522 CERTIFIED OPERATIONS	261,563 CERTIFIED ACRES	\$8.2M OREI / ORG FUNDING	+22% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	522 (19th nationally)
Certified organic acres	261,563
OREI / ORG funding (cumulative)	\$8.2M
Worker employment vs. conventional	+22%
Split operations	44% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Leverage Denver and Boulder's high per-capita organic spending to build short local supply chains.
- Transition Eastern Plains conventional grain acres with Central Plains TOPP mentorship and EQIP cost-share.
- Expand organic beef supply chains to meet growing national demand for grass-fed, certified organic meat.

TOP ORGANIC COMMODITIES

- ▶ **Vegetables:** Front Range CSAs supply Denver and Boulder metro year-round.
- ▶ **Cattle & Beef:** organic ranching spans mountain counties and Eastern Plains.
- ▶ **Grains:** organic wheat, corn, and sorghum on Eastern Plains dryland farms.
- ▶ **Herbs & Specialty Crops:** mountain valley farms supply regional specialty markets.

BARRIERS

- Water scarcity and drought limit organic vegetable yield consistency across the Front Range.
- High land values near Denver compress margins for new entrant farms and expansion-stage operations.
- Short growing seasons at altitude restrict production windows for mountain specialty crop farms.

KEY TAKEAWAY

Colorado's Front Range consumer demand, Eastern Plains grain acreage, and organic beef ranching create three simultaneous growth pathways. With CSU Extension's statewide reach and \$8.2M in OREI/ORG investment, Colorado is positioned to expand certified organic production across all three sectors.

Resources for Farmers

Colorado organic farmers are supported by Colorado State University Extension, the Colorado Department of Agriculture, Rocky Mountain Farmers Union, and Central Plains TOPP. Together they span the full pipeline from transition and certification through technical assistance, funding, and market access.

Colorado State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, vegetable, and livestock production specialists statewide
- Soil health and water conservation research for semi-arid organic systems
- High-altitude and dryland organic farming guides and field days
- Annual Colorado Organic Producers Association conference support

extension.colostate.edu

Colorado Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Colorado Proud branding program for state-produced organic products
- NRCS Colorado: EQIP Organic Initiative and Transition Assistance
- Beginning Farmer and Rancher Development Program resources

ag.colorado.gov

Rocky Mountain Farmers Union

FARMER ADVOCACY & COOPERATIVE SERVICES

- Farmer advocacy for organic and sustainable agriculture policy
- Cooperative grain marketing and shared purchasing programs
- Farmer-to-farmer peer learning networks across Colorado
- Young farmer and beginning rancher support and mentorship

rmfu.org

Central Plains TOPP (CSU-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CO, KS, NE, ND, OK, SD, and WY
- Paid organic mentor matching for transitioning grain and livestock farms
- Workshops on dryland organic production and cover crop integration
- Market access support for organic beef, grain, and specialty crop transition

centralplainstopp.org

DID YOU KNOW? COLORADO

Colorado's Denver-Boulder corridor has one of the highest concentrations of organic food consumers per capita in the country. Yet less than 5% of Colorado farmland is certified organic, creating a significant supply gap that local producers and new entrants can fill. Central Plains TOPP mentorship and CSU Extension production guides make organic transition economically viable for both Front Range market gardeners and Eastern Plains grain operations. The combination of strong local demand and underutilized transition potential makes Colorado one of the highest-opportunity markets in the Central Plains region.

KEY SOURCES

Organic Trade Association. "Colorado Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Colorado Department of Agriculture. "Colorado Organic Program." CDA, 2025, ag.colorado.gov.

Kansas

The wheat belt's organic transition opportunity: vast dryland grain acres and growing Plains beef demand



A FARMER'S TOOLKIT
State Module | August 2026

Kansas ranks 32nd nationally with 190 certified organic operations and 96,452 certified acres. Kansas's organic sector punches above its operation count with large-acre dryland grain farms. The state's wheat and grain heritage translates naturally to organic systems where weed control and soil health management align with certified practices. With \$6.3M in OREI/ORG funding and Kansas State Extension's statewide network, the Central Plains organic grain opportunity in Kansas is substantial.

190 CERTIFIED OPERATIONS	96,452 CERTIFIED ACRES	\$6.3M OREI / ORG FUNDING	+18% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE AT A GLANCE

Certified operations	190 (32nd nationally)
Certified organic acres	96,452
OREI / ORG funding (cumulative)	\$6.3M
Worker employment vs. conventional	+18%
Split operations	44% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Transition dryland wheat and grain acres to organic to supply the premium food-grade organic milling market.
- Expand organic beef production on native Kansas pastures to meet national demand for grass-fed organic beef.
- Supply the Central Plains organic livestock sector with in-state organic grain, reducing feed import costs.

TOP ORGANIC COMMODITIES

- ▶ **Wheat:** organic hard red winter wheat commands strong milling premiums.
- ▶ **Sorghum & Corn:** organic grain sorghum and corn supply Central Plains markets.
- ▶ **Cattle & Beef:** organic grass-fed beef on Kansas pastures for premium markets.
- ▶ **Soybeans:** eastern Kansas organic soybeans help close the national feed gap.

BARRIERS

- Extreme weather variability including drought, hail, and late spring freezes creates yield risk during transition.
- Distance from major consumer markets limits direct marketing and raises supply chain logistics costs.
- Limited local organic grain processing and elevator infrastructure for aggregating small volumes.

KEY TAKEAWAY

Kansas's wheat belt heritage, large farm scale, and grass-fed beef production capacity create a natural alignment with organic systems. Central Plains TOPP mentorship and Kansas State Extension's organic research are closing the knowledge and risk gap for dryland grain farmers weighing organic transition.

Resources for Farmers

Kansas organic farmers are supported by the Kansas Department of Agriculture, Kansas State Research and Extension, the Kansas Rural Center, and Central Plains TOPP. Together they deliver state certification support, applied organic research, farmer advocacy, and mentor matching.

Kansas Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- From the Land of Kansas branding program for state-produced organic products
- NRCS Kansas: EQIP Organic Initiative and Transition Assistance programs
- Beginning Farmer resources and agricultural development loan programs

agriculture.ks.gov

K-State Research and Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic wheat, grain sorghum, soybean, and beef production specialists
- Dryland and irrigated organic systems research at multiple KSU Research Centers
- Soil health, no-till, and integrated weed management research for organic systems
- 105-county extension network delivering statewide organic outreach

ksre.ksu.edu

Kansas Rural Center

FARMER ADVOCACY & SUSTAINABLE AGRICULTURE

- Kansas's leading sustainable and organic agriculture advocacy organization
- Organic and sustainable farmer education and policy advocacy programs
- Annual sustainable agriculture conference and farm tour network
- Beginning farmer programs and organic market development support

kansasruralcenter.org

Central Plains TOPP (CSU-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CO, KS, NE, ND, OK, SD, and WY
- Paid organic mentor matching for dryland grain, sorghum, and beef farms
- Workshops on organic wheat and grain sorghum transition and weed management
- Market access support for organic grain and grass-fed beef supply chains

centralplainstopp.org

DID YOU KNOW? KANSAS

Kansas produces more wheat than any other state, and organic hard red winter wheat sells at a premium of 100% or more above conventional wheat prices. The premium economics for organic wheat are compelling: at \$12-14 per bushel versus \$6-7 conventional, a Kansas dryland wheat farmer transitioning 500 acres could double gross revenue per acre. The three-year transition period is the primary barrier, but Central Plains TOPP mentorship and KSU Extension's organic wheat production guides are making the agronomics and transition financing more accessible for Plains grain farmers.

KEY SOURCES

Organic Trade Association. "Kansas Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Kansas Department of Agriculture. "Kansas Organic Agriculture." KDA, 2025, agriculture.ks.gov.

North Dakota

Prairie giant: top-three nationally in organic certified acres of grain and sunflowers



A FARMER'S TOOLKIT
State Module | August 2026

North Dakota ranks 34th nationally with 155 certified organic operations and 147,455 certified acres. North Dakota is one of the foundational states of the U.S. organic grain supply, with vast certified acreage in organic wheat, sunflowers, corn, soybeans, and flaxseed across the Red River Valley and central plains. The state's well-organized farmer co-op infrastructure and proximity to organic processors in the Upper Midwest create strong market access for producers. The Northern Plains Sustainable Agriculture Society is the state's leading organic farmer network.

155 CERTIFIED OPERATIONS	147,455 CERTIFIED ACRES	\$78M ORGANIC SALES	Top 3 U.S. ORGANIC ACREAGE RANK
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STATE PROFILE

AT A GLANCE

Certified operations	155 (34th nationally)
Certified organic acres	147,455
Organic sales value	\$78 million
Worker employment vs. conventional	+16%
Split operations	35% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Capture organic grain value through expanded on-state milling, oil pressing, and ingredient processing rather than exporting raw organic commodities.
- Develop organic sunflower and flaxseed processing capacity to supply the growing functional food and natural ingredient buyer markets.
- Support beginning and transitioning farmers entering organic grain production as North Dakota's farm population ages and land transfers increase.

TOP ORGANIC COMMODITIES

- ▶ **Wheat:** organic hard red and durum wheat supplies national flour mills.
- ▶ **Sunflowers:** North Dakota is the top U.S. organic sunflower producer.
- ▶ **Soybeans & Corn:** Red River Valley organic grains supply Upper Midwest processors.
- ▶ **Flaxseed:** organic flaxseed with strong omega-3 ingredient market demand.

BARRIERS

- Remote geography and limited organic processing infrastructure mean many organic commodities travel long distances before value is captured.
- Harsh winters, drought variability, and wind erosion risk can destabilize organic grain yields, particularly during the three-year transition period.
- Large conventional farm scale and low land rental markets can make organic transition economics challenging for full-time grain operations.

KEY TAKEAWAY

North Dakota's 1.2 million certified organic acres in wheat, sunflowers, and grain crops make it one of the most important supply states in the U.S. organic food system. On-state processing investment would dramatically increase the economic return of this production base to North Dakota farm families and communities.

Resources for Farmers

North Dakota organic farmers are supported by the North Dakota Department of Agriculture, North Dakota State University Extension, the Northern Plains Sustainable Agriculture Society, and the Central Plains TOPP region. These partners deliver certification, technical assistance, research, and market development resources across the state.

North Dakota Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- ND Proud branding and marketing support for certified organic products
- NRCS North Dakota: EQIP Organic Initiative and Organic Transition Assistance
- Agricultural development grants for organic processing and value-added infrastructure

nd.gov/ndda

North Dakota State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, sunflower, flaxseed, and pulse crop research and extension specialists
- NDSU Carrington Research Extension Center organic systems trials and demonstration
- Soil health, cover cropping, and integrated weed management for organic producers
- Statewide extension agents providing local organic technical assistance in all counties

ndsu.edu/agriculture/extension

Northern Plains Sustainable Agriculture Society

FARMER ADVOCACY & PEER LEARNING

- Primary organic and sustainable farmer organization in the Northern Plains
- Annual NPSAS conference and farm tour connecting organic producers and buyers
- Organic certification guidance and cost-share navigation for new and transitioning producers
- Farmer peer networks and mentorship across North Dakota and neighboring states

npsas.org

Central Plains TOPP (OFRF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CO, KS, ND, NE, OK, SD
- Paid organic mentor matching for grain, sunflower, and pulse crop operations
- Workshops on organic grain transition, dryland management, and certification
- Market access and organic buyer connection resources for ND producers

ofrf.org/topp

DID YOU KNOW? NORTH DAKOTA

North Dakota produces more certified organic sunflowers than any other state in the U.S., making it the national leader in organic sunflower oil, seeds, and specialty ingredient supply. Organic sunflowers thrive on North Dakota's prairies and command substantial premiums over conventional production, making them one of the state's most economically attractive organic rotation crops. With organic snack, oil, and natural food ingredient markets growing consistently, North Dakota sunflower farmers are positioned at the supply end of a reliably premium organic commodity.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

North Dakota Department of Agriculture. Organic Program. NDDA, 2023.

Northern Plains Sustainable Agriculture Society. NPSAS Programs. NPSAS, 2023.

North Dakota State University Extension. Organic Agriculture Resources. NDSU Extension, 2023.

Nebraska

Cornhusker State builds organic grain and beef sector on fertile plains and grasslands



A FARMER'S TOOLKIT
State Module | August 2026

Nebraska ranks 22nd nationally with 356 certified organic operations and 261,210 certified acres. Nebraska's organic sector is anchored by grain production in the eastern Corn Belt and expanding organic beef and rangeland operations on the Sandhills and western plains. The state's position as a national beef production leader creates a natural platform for certified organic grass-fed beef development. The Center for Rural Affairs and Nebraska Sustainable Agriculture Society champion organic farming through policy advocacy and farmer networking.

356 CERTIFIED OPERATIONS	261,210 CERTIFIED ACRES	\$86M ORGANIC SALES	Top 15 U.S. ORGANIC STATE
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STATE PROFILE

AT A GLANCE

Certified operations	356 (22nd nationally)
Certified organic acres	261,210
Organic sales value	\$86 million
Worker employment vs. conventional	+21%
Split operations	43% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic grain aggregation and storage infrastructure to supply regional organic feed mills and reduce export of raw organic grain commodities.
- Develop certified organic grass-fed beef supply chains leveraging Nebraska's Sandhills rangelands and national beef production infrastructure.
- Build organic market connections between eastern Nebraska organic vegetable producers and Omaha and Lincoln metro direct-market consumer demand.

TOP ORGANIC COMMODITIES

- ▶ **Corn & Soybeans:** eastern Nebraska organic corn and soy supply regional feed mills.
- ▶ **Beef Cattle:** Nebraska Sandhills support certified organic and grass-fed beef.
- ▶ **Wheat & Small Grains:** western Nebraska organic winter wheat for regional flour millers.
- ▶ **Vegetables:** organic vegetable farms near Omaha and Lincoln serve co-ops.

BARRIERS

- Conventional commodity infrastructure and high cash rental rates in the Corn Belt create economic barriers to organic grain transition.
- Limited organic processing capacity in the state means organic grain and beef producers often must transport product to out-of-state facilities.
- Drought and weather variability on the western plains and Sandhills create yield risk during the organic transition period.

KEY TAKEAWAY

Nebraska's combination of productive Corn Belt grain ground, vast Sandhills rangeland for organic beef, and growing metro direct-market demand gives its organic sector a strong multi-commodity foundation for sustained expansion.

Resources for Farmers

Nebraska organic farmers are supported by the Nebraska Department of Agriculture, University of Nebraska Extension, the Nebraska Sustainable Agriculture Society, and the Central Plains TOPP region. These organizations deliver certification, technical assistance, market development, and farmer advocacy resources statewide.

Nebraska Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Nebraska Proud branding and marketing support for certified organic products
- NRCS Nebraska: EQIP Organic Initiative and Organic Transition Assistance programs
- Nebraska Agricultural Development grants for organic processing and market projects

nda.nebraska.gov

University of Nebraska Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, beef, and vegetable production research and extension specialists
- UNL Center for Agricultural Profitability organic enterprise budget and transition resources
- Soil health, cover cropping, and integrated pest management for organic producers
- 93-county extension network delivering local organic technical assistance statewide

extension.unl.edu

Nebraska Sustainable Agriculture Society

FARMER ADVOCACY & PEER LEARNING

- Nebraska's primary sustainable and organic farmer advocacy and education organization
- Annual Practical Farmers of the Plains conference and farm tour programs
- Organic certification guidance and cost-share navigation for new applicants
- Farmer peer learning networks and organic mentorship for beginning producers

nebraskaorganic.org

Central Plains TOPP (OFRF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CO, KS, ND, NE, OK, SD
- Paid organic mentor matching for grain, beef, and vegetable operations
- Workshops on organic transition, Corn Belt grain management, and certification
- Market access and organic buyer connection resources for Nebraska producers

ofrf.org/topp

DID YOU KNOW? NEBRASKA

Nebraska's Sandhills region, covering 20,000 square miles of natural grassland, is one of the most ecologically intact rangelands in North America and a natural fit for certified organic grass-fed beef production. The Sandhills' native prairie grasses, low input history, and extensive grazing tradition position Nebraska ranchers for organic beef certification with relatively lower transition complexity compared to cropland operations. With premium organic and grass-fed beef markets growing nationally, Nebraska's rangeland heritage is an underutilized organic economic asset.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Nebraska Department of Agriculture. Organic Agriculture Program. NDA, 2023.

Nebraska Sustainable Agriculture Society. Organic Programs. NSAS, 2023.

University of Nebraska Extension. Organic and Sustainable Agriculture. UNL Extension, 2023.

Oklahoma

Sooner State organic sector grows on winter wheat, cattle transition, and urban market development



A FARMER'S TOOLKIT
State Module | August 2026

Oklahoma ranks 43rd nationally with 86 certified organic operations and 36,066 certified acres. Oklahoma's organic sector is emerging, led by organic winter wheat on the state's central plains, diversified vegetable and livestock operations in the Cross Timbers and Ozark regions, and a growing direct-market scene in Oklahoma City and Tulsa. The state's strong cattle production heritage provides a natural pathway for organic and grass-fed beef development. The Oklahoma Food and Farm Coalition and Oklahoma State University Extension are the primary anchors of organic technical and organizational support.

86 CERTIFIED OPERATIONS	36,066 CERTIFIED ACRES	\$24M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE

AT A GLANCE

Certified operations	86 (43rd nationally)
Certified organic acres	36,066
Organic sales value	\$24 million
Worker employment vs. conventional	+22%
Split operations	44% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop certified organic winter wheat as a signature Oklahoma organic commodity with direct connections to regional organic flour milling and baking supply chains.
- Expand certified organic and grass-fed beef supply chains leveraging Oklahoma's vast rangeland and cattle production infrastructure and expertise.
- Build farmers market and CSA capacity in Oklahoma City and Tulsa to serve growing urban consumer demand for locally grown organic food.

TOP ORGANIC COMMODITIES

- ▶ **Winter Wheat:** red winter wheat belt supplies organic flour millers statewide.
- ▶ **Beef Cattle:** ranching heritage supports organic and grass-fed beef transition.
- ▶ **Vegetables:** organic vegetable farms near OKC and Tulsa supply direct markets.
- ▶ **Pecans:** Oklahoma pecan orchards transition to organic for premium markets.

BARRIERS

- Conventional wheat and cattle market infrastructure creates economic inertia against organic transition for large-scale Oklahoma producers.
- Extreme weather variability including drought, hail, and tornado risk creates production uncertainty, particularly during the organic transition period.
- Limited organic processing and distribution infrastructure constrains market access for organic grain and livestock producers in rural Oklahoma.

KEY TAKEAWAY

Oklahoma's organic sector is positioned for meaningful growth built on its winter wheat heritage, vast cattle rangelands, and two major urban markets hungry for local organic food. Central Plains TOPP mentorship and OSU Extension are the key accelerants for this transition.

Resources for Farmers

Oklahoma organic farmers are supported by the Oklahoma Department of Agriculture, Food and Forestry, Oklahoma State University Extension, the Oklahoma Food and Farm Coalition, and the Central Plains TOPP region. These partners deliver certification, technical assistance, and market development resources statewide.

Oklahoma Dept of Agriculture, Food and Forestry

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Oklahoma Made and Oklahoma Grown branding support for certified organic products
- NRCS Oklahoma: EQIP Organic Initiative and Organic Transition Assistance programs
- Agricultural development grants for organic processing and market infrastructure

oda.state.ok.us

Oklahoma State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic wheat, beef, pecan, and vegetable production research and extension specialists
- OSU organic systems research and on-farm demonstration programs statewide
- Soil health, cover cropping, and integrated pest management for organic transition
- 77-county extension network delivering local organic technical assistance statewide

extension.okstate.edu

Oklahoma Food and Farm Coalition

FARMER ADVOCACY & PEER LEARNING

- Oklahoma's primary sustainable and organic food and farm advocacy network
- Producer education, peer networking, and organic market development programs
- Urban agriculture and direct-market support in Oklahoma City and Tulsa
- Farmer-to-farmer peer learning and beginning organic producer mentorship

okfoodandfarm.org

Central Plains TOPP (OFRF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CO, KS, ND, NE, OK, SD
- Paid organic mentor matching for wheat, beef, vegetable, and pecan operations
- Workshops on organic transition, Great Plains grain management, and certification
- Market access and organic buyer connection resources for Oklahoma producers

ofrf.org/topp

DID YOU KNOW? OKLAHOMA

Oklahoma's cattle ranching heritage and vast native rangeland make it one of the most naturally positioned states in the nation for expanded certified organic and grass-fed beef production. Oklahoma's native prairie grasses and historically low-input rangelands create organic transition conditions that are far less challenging than converting row-crop acres. With premium organic and grass-fed beef markets growing at double-digit rates nationally, Oklahoma cattle ranchers who pursue certification gain access to buyers offering significant price premiums over conventional cattle markets.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Oklahoma Department of Agriculture, Food and Forestry. Organic Program. ODAFF, 2023.

Oklahoma Food and Farm Coalition. Programs and Resources. OKFFC, 2023.

Oklahoma State University Extension. Sustainable Agriculture Programs. OSU Extension, 2023.

South Dakota

Mount Rushmore State builds organic grain, sunflower, and rangeland beef on the northern plains



A FARMER'S TOOLKIT
State Module | August 2026

South Dakota ranks 39th nationally with 104 certified organic operations and 148,228 certified acres. South Dakota's organic sector is anchored by large-scale grain and sunflower production on the eastern plains and rangeland beef operations in the vast grasslands of the western region. The state's position at the junction of the Corn Belt and the Great Plains rangeland creates a dual-commodity organic opportunity with grain and livestock producers increasingly finding organic certification economically attractive. The South Dakota Organic Alliance and South Dakota State University Extension support organic development across the state.

104 CERTIFIED OPERATIONS	148,228 CERTIFIED ACRES	\$38M ORGANIC SALES	Top 10 ORGANIC ACREAGE RANK
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STATE PROFILE

AT A GLANCE

Certified operations	104 (39th nationally)
Certified organic acres	148,228
Organic sales value	\$38 million
Worker employment vs. conventional	+17%
Split operations	37% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop organic grain aggregation and value-added processing infrastructure to capture more value from South Dakota's substantial certified grain and sunflower acreage.
- Expand organic rangeland beef supply chains leveraging western South Dakota's vast native grasslands and historically low chemical input use.
- Support beginning farmer organic transition on eastern South Dakota grain acres as the farm population ages and land transfer opportunities increase.

TOP ORGANIC COMMODITIES

- ▶ **Wheat & Corn:** eastern plains organic wheat and corn supply regional processors.
- ▶ **Sunflowers:** organic sunflowers supply oil, snack seed, and bird feed markets.
- ▶ **Beef Cattle:** western SD's vast rangeland supports certified organic beef.
- ▶ **Soybeans:** southeastern SD organic soybeans supply regional feed mills.

BARRIERS

- Remote geography and limited organic processing infrastructure mean most of South Dakota's organic grain leaves the state as raw commodity.
- Extreme weather including drought, hail, and late spring freezes creates production risk, particularly during the organic transition period.
- Conventional grain infrastructure and cash rental markets create economic inertia against organic grain transition for large-scale eastern SD producers.

KEY TAKEAWAY

South Dakota's 290,000+ certified organic acres in grain, sunflowers, and rangeland make it an important supply state for the U.S. organic food system. On-state organic processing and value-added investment would dramatically increase the economic return of this production base to South Dakota farm families.

Resources for Farmers

South Dakota organic farmers are supported by the South Dakota Department of Agriculture and Natural Resources, South Dakota State University Extension, the South Dakota Organic Alliance, and the Central Plains TOPP region. These partners deliver certification, research, and technical assistance resources statewide.

SD Dept of Agriculture and Natural Resources

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- South Dakota Proud branding and marketing support for certified organic products
- NRCS South Dakota: EQIP Organic Initiative and Organic Transition Assistance
- Agricultural development grants for organic market and infrastructure projects

danr.sd.gov

South Dakota State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic grain, sunflower, beef, and soybean research and extension specialists
- SDSU organic systems research and northern plains dryland farming programs
- Soil health, cover cropping, and integrated weed management for organic producers
- Statewide extension network delivering local organic technical assistance in all counties

extension.sdstate.edu

South Dakota Organic Alliance

FARMER ADVOCACY & PEER LEARNING

- South Dakota's primary organic farmer advocacy and education network
- Annual SD Organic Alliance conference and farm tour programs
- Organic certification guidance and cost-share navigation for new and transitioning producers
- Farmer peer learning and mentorship for organic grain and livestock producers

sdorganicalliance.org

Central Plains TOPP (OFRF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves CO, KS, ND, NE, OK, SD
- Paid organic mentor matching for grain, sunflower, beef, and soybean operations
- Workshops on organic grain transition, northern plains management, and certification
- Market access and organic buyer connection resources for South Dakota producers

ofrf.org/topp

DID YOU KNOW? SOUTH DAKOTA

Western South Dakota's Badlands and Black Hills region contains some of the most intact native rangeland in North America, creating ideal conditions for certified organic grass-fed beef production. The region's historically low chemical input use, native grass diversity, and vast open rangeland meet organic certification requirements with relatively lower transition barriers than crop ground. With premium organic and grass-fed beef markets growing steadily, South Dakota ranchers in the western grasslands are positioned to access significant price premiums over conventional cattle markets.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

South Dakota Department of Agriculture and Natural Resources. Organic Program. SDANR, 2023.

South Dakota Organic Alliance. Programs and Resources. SDOA, 2023.

South Dakota State University Extension. Organic Agriculture Programs. SDSU Extension, 2023.



**WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM**

Appendix A: State Data Sheets

SOUTHWEST

New Mexico

Land of Enchantment grows organic chiles, heritage grains, and rangeland beef under high desert sun



WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

New Mexico ranks 41st nationally with 102 certified organic operations and 40,721 certified acres. New Mexico's organic sector is deeply tied to the state's agricultural heritage: ancient chile varieties, heritage grains, and acequia-irrigated diversified farms in the Rio Grande Valley coexist with expanding rangeland organic beef operations and growing direct-market produce farms near Albuquerque and Santa Fe. The state's unique cultural agricultural traditions and the New Mexico Farmers Marketing Association provide a strong foundation for organic market development.

102 CERTIFIED OPERATIONS	40,721 CERTIFIED ACRES	\$29M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE AT A GLANCE

Certified operations	102 (41st nationally)
Certified organic acres	40,721
Organic sales value	\$29 million
Worker employment vs. conventional	+25%
Split operations	47% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop certified organic Hatch chile as a nationally branded premium organic specialty crop with protected geographic identity and premium buyer access.
- Expand organic rangeland beef certification and direct-to-consumer marketing leveraging New Mexico's vast and historically low-input rangelands.
- Support acequia farming community transition to certified organic status, preserving agricultural heritage while accessing premium organic market channels.

TOP ORGANIC COMMODITIES

- ▶ **Chile Peppers:** Hatch green and red organic chiles supply premium food markets.
- ▶ **Beef Cattle:** organic beef on New Mexico's vast rangelands for premium buyers.
- ▶ **Vegetables & Heritage Crops:** acequia-irrigated heirloom vegetables and heritage crops.
- ▶ **Pecans:** organic pecan orchards along the Rio Grande supply premium buyers.

BARRIERS

- Severe water scarcity and drought conditions in New Mexico's arid climate create ongoing production risk, particularly during the three-year organic transition period.
- Limited organic processing and cold storage infrastructure in rural areas constrains perishable organic crop market access for small producers.
- Small farm size and geographic remoteness increase per-unit organic production and distribution costs relative to larger or better-located operations.

KEY TAKEAWAY

New Mexico's organic heritage, from acequia-irrigated Rio Grande farms to rangeland cattle and iconic Hatch chiles, gives its organic sector deep cultural authenticity and unique premium market positioning that no other state can replicate.

Resources for Farmers

New Mexico organic farmers are supported by the New Mexico Department of Agriculture, New Mexico State University Extension, the New Mexico Farmers Marketing Association, and the Southwest TOPP region. These organizations deliver certification, technical assistance, and market connection resources across the state's diverse agricultural landscape.

New Mexico Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- New Mexico True branding program supporting certified organic product promotion
- NRCS New Mexico: EQIP Organic Initiative and Organic Transition Assistance
- Specialty crop and acequia community agricultural development grant programs

nmda.nmsu.edu

New Mexico State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic chile, pecan, vegetable, and rangeland beef research and extension specialists
- NMSU organic dryland and irrigated farming systems research and demonstration programs
- Water conservation, soil health, and arid-climate organic management resources
- 33-county extension network delivering local organic technical assistance statewide

aces.nmsu.edu

New Mexico Farmers Marketing Association

FARMER ADVOCACY & PEER LEARNING

- Statewide network of farmers markets providing direct-market access for organic producers
- Organic producer outreach, education, and market certification support programs
- Farm-to-restaurant and farm-to-institution connection services in Albuquerque and Santa Fe
- Farmer peer learning and organic market development resources statewide

nmfma.org

Southwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AZ, CA, HI, NM, NV, TX, UT
- Paid organic mentor matching for chile, vegetable, beef, and pecan operations
- Workshops on organic transition, arid-climate management, and water conservation
- Market access and specialty food buyer connections for NM organic producers

ccof.org/topp

DID YOU KNOW? NEW MEXICO

The Hatch Valley of New Mexico, famous worldwide for its unique chile flavor profile, is home to a growing cluster of certified organic chile producers supplying national specialty food brands and premium restaurant buyers. The Hatch chile's distinct terroir, like wine grapes in a famous appellation, creates a product that cannot be authentically replicated elsewhere. Certified organic Hatch chiles command exceptional price premiums and growing national recognition as a premium specialty ingredient. NMSU Extension's chile breeding and agronomy programs and Southwest TOPP's organic mentor network are actively supporting producers in transitioning Hatch acreage to certified organic.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

New Mexico Department of Agriculture. Organic Program. NMDA, 2023.

New Mexico Farmers Marketing Association. NMFMA Programs. NMFMA, 2023.

New Mexico State University Extension. Organic Agriculture Resources. NMSU Extension, 2023.

Texas

Lone Star organic expansion spans cotton transition, diverse specialty crops, and booming Austin market



Texas ranks 6th nationally with 1,071 certified organic operations and 568,678 certified acres. Texas's organic sector is vast and growing, spanning organic cotton and grain on the High Plains, diverse vegetables and specialty crops in the Rio Grande Valley and Hill Country, and intensive organic market farms near Austin, Dallas, Houston, and San Antonio. The state's exceptional organic market depth, with over 30 million residents, creates extraordinary consumer demand. Texas Organic Farmers and Gardeners Association and Texas A&M AgriLife Extension provide the primary technical and organizational backbone for the state's organic producers.

1,071 CERTIFIED OPERATIONS	568,678 CERTIFIED ACRES	\$94M ORGANIC SALES	Top 15 U.S. ORGANIC STATE
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STATE PROFILE AT A GLANCE

Certified operations	1,071 (6th nationally)
Certified organic acres	568,678
Organic sales value	\$94 million
Worker employment vs. conventional	+23%
Split operations	46% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop certified organic cotton supply chains to directly link Texas High Plains organic cotton growers with national organic apparel and personal care brands.
- Expand organic vegetable and fruit production capacity near Austin, Dallas, Houston, and San Antonio to supply Texas's massive and growing urban organic consumer base.
- Build organic processing and aggregation infrastructure along the I-35 corridor to serve Texas organic producers selling into the state's major metropolitan markets.

TOP ORGANIC COMMODITIES

- ▶ **Cotton:** Texas is the top U.S. organic cotton state for apparel markets.
- ▶ **Vegetables & Fruits:** Rio Grande Valley and Hill Country organic crops for TX metros.
- ▶ **Beef Cattle:** organic grass-fed beef on Texas rangelands for premium retailers.
- ▶ **Pecans:** Texas organic pecans supply premium nut and confectionery markets.

BARRIERS

- Extreme heat, drought, and weather variability across Texas's diverse climatic zones create significant production risk during the organic transition period.
- Large conventional farm scale in major commodity sectors creates economic inertia against organic transition for High Plains grain and cotton operations.
- Geographic size of Texas means distribution costs are high and organic producer networks are geographically fragmented across multiple distant regions.

KEY TAKEAWAY

Texas's organic sector is uniquely positioned by its combination of the nation's largest organic cotton acreage, four major metro organic consumer markets, vast rangeland for organic beef, and a diverse agricultural geography that supports organic production from the Gulf Coast to the Panhandle.

Resources for Farmers

Texas organic farmers are supported by the Texas Department of Agriculture, Texas A&M AgriLife Extension, the Texas Organic Farmers and Gardeners Association, and the Southwest TOPP region. These organizations deliver certification, research, technical assistance, and market development resources across the state.

Texas Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- GO TEXAN branding and marketing support for certified organic Texas products
- NRCS Texas: EQIP Organic Initiative and Organic Transition Assistance programs
- Texas agricultural development grants for organic processing and market infrastructure

texasagriculture.gov

Texas A&M AgriLife Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic cotton, vegetable, beef, pecan, and specialty crop research and extension
- Texas A&M organic systems research and on-farm demonstration programs statewide
- Soil health, dryland management, and integrated pest management for organic transition
- 254-county extension network delivering local organic technical assistance statewide

agrilifeextension.tamu.edu

Texas Organic Farmers and Gardeners Assoc.

FARMER ADVOCACY & PEER LEARNING

- Texas's primary organic farmer and gardener advocacy and education organization
- Annual TOFGA Conference connecting Texas organic producers, buyers, and advocates
- Organic certification guidance and cost-share navigation for new applicants
- Farmer peer learning networks, mentorship, and market development statewide

tofga.org

Southwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AZ, CA, HI, NM, NV, TX, UT
- Paid organic mentor matching for cotton, vegetable, beef, and pecan operations
- Workshops on organic transition, dryland management, and certification in Texas
- Market access and organic buyer connections for Texas organic producers

ccof.org/topp

DID YOU KNOW? TEXAS

Texas produces more certified organic cotton than any other state in the United States, making it the foundation of the U.S. domestic organic fiber supply for apparel, home goods, and personal care products. With global demand for certified organic cotton growing as major brands commit to organic fiber sourcing, Texas High Plains organic cotton farmers are positioned at the supply end of one of the fastest-growing segments of the organic market. Texas A&M AgriLife's cotton research program and Southwest TOPP's mentorship network are helping Texas producers transition conventional cotton acres to certified organic and access the premium markets that come with certification.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Texas Department of Agriculture. GO TEXAN and Organic Program. TDA, 2023.

Texas Organic Farmers and Gardeners Association. TOFGA Programs. TOFGA, 2023.

Texas A&M AgriLife Extension. Organic Agriculture Resources. AgriLife, 2023.



**WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM**

Appendix A: State Data Sheets

WEST



Arizona

The nation's winter produce hub and a proving ground for water-resilient organic systems



Arizona ranks 26th nationally with 313 certified organic operations and 37,482 certified acres. With 296 certified operations spanning desert vegetables, dryland grains, and emerging cooperatives, Arizona organic farms hire 738% more workers than conventional operations.

313 CERTIFIED OPERATIONS	37,482 CERTIFIED ACRES	90% HOUSEHOLDS BUY ORGANIC	+738% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE

AT A GLANCE

Certified operations	313 (26th nationally)
Certified organic acres	37,482
Household organic adoption	90%
Worker employment vs. conventional	+738%
Split operations	50% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand water-efficient organic systems and controlled environment agriculture in arid zones.
- Grow regional aggregation and food hub capacity through Sun Produce Cooperative.
- Strengthen Indigenous and Sonoran-adapted organic production traditions and seed sovereignty.

TOP ORGANIC COMMODITIES

- **Lettuce:** Yuma provides a major share of the national organic supply.
- **Broccoli:** cool-season vegetable for national distribution, Nov-April.
- **Celery:** specialty winter vegetable; concentrated organic production.
- **Citrus, dates & herbs:** CEA herbs and dates are emerging high-value organic categories.

BARRIERS

- Water scarcity and Colorado River allocation cuts pressure irrigated organic systems.
- Labor constraints and cross-border workforce dependencies create operational risk.
- Limited in-state processing and cold storage outside the Yuma corridor.

KEY TAKEAWAY

Arizona's organic sector punches above its weight: a critical national winter produce supplier with the country's strongest worker-employment economics, and growing food hub infrastructure anchored by ASU's TOPP program.

Resources for Farmers

Arizona's organic ecosystem is anchored by ASU's Swette Center, the Arizona Department of Agriculture, University of Arizona Extension, and Sun Produce Cooperative. Together they provide transition mentorship, certification support, and market access across the state.

Arizona TOPP (ASU Swette Center)

MENTORSHIP & TRANSITION SUPPORT

- Arizona's TOPP lead; peer mentorship for transitioning farmers
- One-on-one technical assistance for organic systems planning
- Workshops on water-efficient organic production practices
- Connect transitioning farmers to organic buyers and markets

arizonatopp.org

AZ Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: up to \$500/yr per scope
- Arizona Grown branding for state-produced organics
- USDA NOP certification authorization and oversight
- Food safety and handling program resources

agriculture.az.gov

U of AZ Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable and specialty crop production research
- Water-use efficiency trials for organic desert farming
- County offices in Yuma, Maricopa, Pima, and beyond
- IPM and pesticide-free resources for organic certification

extension.arizona.edu

Sun Produce Cooperative

AGGREGATION, DISTRIBUTION & MARKET ACCESS

- Farmer-owned cooperative for Arizona organic produce
- Aggregates and distributes to regional organic buyers
- Supports small and mid-size farms with market access
- Collective bargaining for better prices and contracts

sunproducecoop.org

DID YOU KNOW? ARIZONA

ASU's Swette Center leads Arizona TOPP, pairing transitioning farmers with experienced organic mentors across the state. The program supports Arizona organic farms that already hire 738% more workers than conventional counterparts, helping to grow a high-value, labor-intensive supply chain anchoring the state's winter vegetable economy. Arizona's 90% household organic purchasing rate reflects an exceptionally strong consumer base for locally grown certified products.

KEY SOURCES

Organic Trade Association. "Arizona Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Arizona State University Swette Center. "Arizona TOPP Program Overview." ASU, 2025, arizonatopp.org.

Hawaii

Globally unique commodities from coffee to taro, with island-specific production challenges and strong premium markets



Hawaii ranks 39th nationally with 104 certified organic operations and 100,185 certified acres. Hawaii's organic agriculture is defined by globally unique commodities that command premium prices worldwide. With \$6.1M in OREI/ORG funding and UH CTAHR's island-specific research, Hawaii is expanding organic certification across coffee, macadamia, and taro while confronting the structural challenge of reducing the state's near-total dependence on imported food.

104 CERTIFIED OPERATIONS	100,185 CERTIFIED ACRES	\$6.1M OREI / ORG FUNDING	+35% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE AT A GLANCE

Certified operations	104 (39th nationally)
Certified organic acres	100,185
OREI / ORG funding (cumulative)	\$6.1M
Worker employment vs. conventional	+35%
Split operations	29% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic coffee certification to capture growing premium and specialty third-wave coffee market premiums.
- Develop organic macadamia nut supply chains targeting premium confectionery and specialty retail globally.
- Build local organic food production capacity to reduce Hawaii's 85-90% dependence on imported food.

TOP ORGANIC COMMODITIES

- ▶ **Coffee:** Hawaii is the only U.S. state producing commercial coffee.
- ▶ **Macadamia Nuts:** Big Island organic macadamia for premium specialty markets.
- ▶ **Taro:** culturally significant staple; organic taro for poi markets.
- ▶ **Tropical Fruits & Vegetables:** diverse organic tropical crops for local and export channels.

BARRIERS

- Geographic isolation drives high organic input and certification costs that compress farm-level margins.
- Limited arable land and development pressure on agricultural land constrain organic expansion.
- Biosecurity regulations on plant material restrict access to certified organic seed and planting stock.

KEY TAKEAWAY

Hawaii's organic agriculture is anchored by globally irreplaceable commodities: Kona coffee, macadamia nuts, and taro. The state's existential organic challenge is food security: reducing 85-90% import dependency through local organic production requires targeted infrastructure investment and a sustained farmer support pipeline from CTAHR and Southwest TOPP.

Resources for Farmers

Hawaii organic farmers are supported by the Hawaii Organic Farmers Association, the Hawaii Department of Agriculture, UH CTAHR Extension, and Southwest TOPP. Together they address Hawaii's unique island certification, input access, and market connectivity needs.

Hawaii Organic Farmers Assoc.

FARMER ADVOCACY & CERTIFICATION

- Hawaii's primary organic farmer advocacy and education organization
- Organic certification assistance and cost-share navigation for island farmers
- Annual Organic Farming Conference and island-based farmer networks
- Technical workshops on coffee, macadamia, taro, and tropical fruit systems

hofa.us

Hawaii Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Hawaii Grown branding and market development for organic producers
- NRCS Hawaii: EQIP Organic Initiative programs for island farm transition
- Biosecurity compliance support for organic seed and input sourcing

hdoa.hawaii.gov

UH CTAHR Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic coffee, macadamia, taro, and tropical crop production specialists
- Island-specific soil health, pest management, and water conservation research
- Komohana Research and Extension Center: organic systems field trials on Big Island
- Farm business planning and beginning farmer programs for island operations

ctahr.hawaii.edu

Southwest TOPP (ASU Swette Center-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AZ, CA, HI, NM, NV, TX, UT, and Pacific territories
- Paid organic mentor matching adapted to island and tropical production systems
- Workshops on organic tropical crop certification and pest management
- Market access development for organic coffee and specialty crop producers

swcenter.asu.edu/topp

DID YOU KNOW? HAWAII

Hawaii is the only U.S. state that produces commercial coffee, and Kona coffee is one of the most recognizable and premium-priced coffee origins in the world. Organic certification adds a significant premium to already-premium Kona and Kauai coffee, making Hawaii organic coffee among the highest per-pound revenue crops in U.S. agriculture. Yet despite this commodity advantage, Hawaii imports 85-90% of its food. Expanding organic production across coffee, taro, and tropical fruits simultaneously addresses both the premium market opportunity and Hawaii's food security vulnerability.

KEY SOURCES

Organic Trade Association. "Hawaii Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Hawaii Department of Agriculture. "Hawaii Organic Agriculture Program." HDOA, 2025, hdoa.hawaii.gov.

Northern California

Organic pioneer region: wine country, Sacramento Valley grains, and North Coast specialty crops



WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Northern California is home to the largest concentration of certified organic operations in the nation, with approximately 2,750 certified operations and 1,181,000 certified acres — representing about half of California's 5,465 total certified operations ranking 1st nationally. Northern California's organic sector runs from the Sacramento Valley's vast organic rice, wheat, and almond production through Napa and Sonoma's organic wine grape operations to the Mendocino and Humboldt coast's legacy organic vegetable and specialty crop farms. The Bay Area's extraordinary organic consumer market and California Certified Organic Farmers (CCOF), headquartered in Santa Cruz, anchor a world-class organic system. California leads the nation in certified organic operations with 5,465 certified operations statewide, of which approximately 2,750 are located across Northern California's counties.

~2,750	~1,181,000	\$900M+	#1
CERTIFIED OPERATIONS	CERTIFIED ACRES	ORGANIC SALES (CA)	U.S. ORGANIC STATE

STATE PROFILE

AT A GLANCE

Certified operations (N. CA region)	~2,750 (part of CA's #1 national rank)
Certified organic acres (N. CA)	~1,181,000
Organic wine grape acres	Growing rapidly
Worker employment vs. conventional	+29%
Split operations	55% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic wine grape acreage in Sonoma, Mendocino, and Lake Counties to meet rapidly growing global demand for certified organic California wines.
- Develop organic Sacramento Valley rice and grain value-added processing capacity to supply Bay Area and national organic natural food manufacturers with California-origin certified grain.
- Leverage the Bay Area's world-leading organic consumer market to support new organic farm enterprises and premium direct-to-consumer and restaurant channel development.

TOP ORGANIC COMMODITIES

- ▶ **Wine Grapes:** Napa, Sonoma, and Mendocino supply the organic wine market.
- ▶ **Rice & Grains:** Sacramento Valley organic rice and wheat for national food makers.
- ▶ **Tree Nuts:** organic almonds, walnuts, and pistachios supply global buyers.
- ▶ **Vegetables & Specialty:** Bay Area farms supply the premier organic consumer market.

BARRIERS

- Extreme land values across the Bay Area, Wine Country, and Sacramento Valley create significant farmland access barriers for beginning organic producers.
- Drought and water scarcity in the Sacramento Valley create ongoing production risk and regulatory uncertainty for irrigated organic crop operations.
- Labor cost and availability for specialty crop harvest operations in Wine Country and North Coast regions are ongoing organic production constraints.

KEY TAKEAWAY

Northern California is the birthplace and ongoing global epicenter of organic agriculture, from CCOF's founding in 1973 to today's world-leading organic wine, rice, tree nut, and specialty crop sectors. The Bay Area's organic consumer market is unmatched anywhere on Earth.

Resources for Farmers

Northern California organic farmers are supported by the California Department of Food and Agriculture, UC Cooperative Extension, California Certified Organic Farmers (CCOF), and the Southwest TOPP region. These organizations deliver certification, research, technical assistance, and market development resources across the Northern California agricultural landscape.

California Department of Food and Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- CDFA Organic Program: one of the nation's largest state organic regulatory programs
- NRCS California: EQIP Organic Initiative, RCPP, and Organic Transition Assistance
- California Specialty Crop Block Grants for organic market infrastructure development

cdfa.ca.gov/organic

UC Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic wine grape, rice, almond, vegetable, and specialty crop research statewide
- UC Davis organic agriculture research and Cooperative Extension farm advisor network
- Soil health, water use efficiency, and integrated pest management for organic systems
- 58-county extension network delivering local organic technical assistance across CA

ucanr.edu

CCOF (California Certified Organic Farmers)

FARMER ADVOCACY & PEER LEARNING

- Founded 1973: one of the nation's oldest and largest organic certification organizations
- CCOF certifies 3,000+ operations in California and across the U.S.
- Organic policy advocacy, farmer education, and market development programs
- Annual CCOF Spring Conference and organic farmer peer network statewide

ccof.org

Southwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- CCOF leads the Southwest TOPP region serving AZ, CA, HI, NM, NV, TX, and UT
- Paid organic mentor matching for wine grape, grain, nut, and vegetable operations
- Workshops on organic transition, California pest management, and certification
- Market access and Bay Area food hub connections for Northern CA organic producers

ccof.org/topp

DID YOU KNOW? NORTHERN CALIFORNIA

California Certified Organic Farmers (CCOF) was founded in 1973 in Santa Cruz County, making Northern California the birthplace of the U.S. organic certification movement that eventually led to the USDA National Organic Program. CCOF's founding in 1973 by a group of Monterey Bay area farmers and advocates established the first U.S. voluntary organic certification standards, creating the model that all 50 states and ultimately the federal government would follow. Northern California's organic legacy is not just economic but foundational to the entire U.S. and global organic agriculture movement.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

California Department of Food and Agriculture. Organic Program. CDFA, 2023.

California Certified Organic Farmers. CCOF Annual Report. CCOF, 2023.

UC Cooperative Extension. Organic Agriculture Research and Extension. UCANR, 2023.

Nevada

Desert state builds organic sector on high-value crops, rangelands, and Las Vegas market demand



**WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM**

A FARMER'S TOOLKIT
State Module | August 2026

Nevada ranks 35th nationally with 125 certified organic operations and 411,523 certified acres. Nevada's organic sector is defined by its extremes: vast certified rangeland in the north serving organic beef markets, and intensively managed organic vegetable and herb operations near Las Vegas and Reno supplying some of the West's highest-volume hospitality and restaurant markets. The state's arid climate, when combined with irrigation from the Truckee, Carson, and Humboldt rivers, supports productive organic operations in the western valleys. The Nevada Division of Agriculture and University of Nevada Extension anchor organic technical support statewide.

125 CERTIFIED OPERATIONS	411,523 CERTIFIED ACRES	\$14M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE AT A GLANCE

Certified operations	125 (35th nationally)
Certified organic acres	411,523
Organic sales value	\$14 million
Worker employment vs. conventional	+20%
Split operations	40% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop farm-to-hotel and farm-to-restaurant organic supply chains in Las Vegas, leveraging its position as the world's largest hospitality market for premium food.
- Expand certified organic rangeland beef certification on Nevada's vast public land rangelands, which have historically low input use facilitating organic transition.
- Invest in organic cold storage and distribution infrastructure to support year-round organic supply to Nevada's hospitality and retail markets.

TOP ORGANIC COMMODITIES

- ▶ **Beef Cattle:** Great Basin rangelands support organic and grass-fed beef.
- ▶ **Vegetables & Herbs:** organic vegetables and herbs near Las Vegas supply restaurants.
- ▶ **Alfalfa & Hay:** Nevada irrigated valleys supply organic dairy feed in the West.
- ▶ **Specialty Crops:** organic garlic, onions, and specialty vegetables for LV markets.

BARRIERS

- Severe water scarcity and ongoing drought conditions in the Great Basin create significant production risk for irrigated organic operations.
- Limited organic processing and aggregation infrastructure makes it difficult for Nevada organic producers to reach wholesale and institutional buyers.
- Geographic isolation and small farm population create thin farmer networks and limited peer learning opportunities for organic transition support.

KEY TAKEAWAY

Nevada's organic sector has two powerful growth engines: vast rangeland beef potential in the north and extraordinary hospitality market demand in Las Vegas that represents a uniquely high-volume organic buyer accessible to no other state in the same way.

Resources for Farmers

Nevada organic farmers are supported by the Nevada Department of Agriculture, University of Nevada Cooperative Extension, and the Southwest TOPP region. These partners deliver certification, research, and technical assistance resources across Nevada's diverse and geographically challenging agricultural landscape.

Nevada Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Nevada Grown branding and marketing support for certified organic products
- NRCS Nevada: EQIP Organic Initiative, Transition Assistance, and RCPP programs
- State agricultural development grants for organic processing and market development

agri.nv.gov

University of Nevada Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic vegetable, rangeland beef, and hay crop research and extension specialists
- Arid-climate organic production and water conservation research programs
- Soil health, drip irrigation, and integrated pest management for organic systems
- 17-county extension network delivering local organic technical assistance statewide

extension.unr.edu

Nevada Small Business Development Center

FARMER ADVOCACY & PEER LEARNING

- Business planning and financial management support for organic farm enterprises
- Market development and hospitality industry connection resources for organic producers
- Beginning farmer support and enterprise diversification resources
- Connections to Nevada agricultural loan and grant programs for organic producers

nevadasbdc.org

Southwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AZ, CA, HI, NM, NV, TX, UT
- Paid organic mentor matching for rangeland beef, vegetable, and alfalfa operations
- Workshops on organic transition, arid-climate management, and certification
- Market access and hospitality industry connections for Nevada organic producers

ccof.org/topp

DID YOU KNOW? NEVADA

Las Vegas's 40 million annual visitors make it the single largest concentration of restaurant and hospitality food purchasing in the United States, creating extraordinary organic market demand within Nevada's borders. Nevada organic producers who can supply Las Vegas casinos, hotels, and restaurants with certified organic produce, herbs, and specialty crops access buyers with both the volume and the premium budget to absorb organic price points. University of Nevada Extension's farm business resources and Southwest TOPP's mentor network are helping Nevada organic producers develop the supply chain relationships to tap this unmatched opportunity.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Nevada Department of Agriculture. Organic Certification Program. NDA, 2023.

University of Nevada Cooperative Extension. Organic Agriculture Programs. UNCE, 2023.

Nevada Tourism and Hospitality Research. Las Vegas Visitor Statistics. LVCVA, 2023.

Southern California

LA basin citrus, avocados, and urban farms serve the world's most lucrative organic market



WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Southern California is home to approximately 2,710 certified organic operations and 659,000 certified acres — representing roughly half of California's 5,465 total certified operations, which rank 1st nationally. Southern California's organic sector spans Ventura County's organic strawberry and citrus fields, San Diego County's organic avocado orchards, the Coachella and Imperial Valleys' organic winter vegetable production, and an expanding urban and peri-urban organic farm scene serving LA's extraordinary organic consumer economy. Los Angeles is the largest organic food market in the United States by sales volume, creating unmatched demand depth for Southern California organic producers. California's 5,465 total certified operations rank 1st nationally; Southern California's approximately 2,710 operations account for roughly half of the state's total.

~2,710 CERTIFIED OPERATIONS	~659,000 CERTIFIED ACRES	\$900M+ ORGANIC SALES (CA)	#1 U.S. ORGANIC STATE
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STATE PROFILE

AT A GLANCE

Certified operations (S. CA region)	~2,710 (part of CA's #1 national rank)
Certified organic acres (S. CA)	~659,000
Organic avocado production	Leading U.S. region
Worker employment vs. conventional	+30%
Split operations	56% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic avocado acreage in San Diego County to meet rapidly growing national and international demand for certified organic California avocados.
- Develop urban organic farming and direct-to-consumer supply chains in the Los Angeles basin to serve the nation's largest organic consumer market more efficiently.
- Leverage California's organic winter vegetable advantage in the Coachella and Imperial Valleys to supply national organic retailers during the out-of-season gap.

TOP ORGANIC COMMODITIES

- ▶ **Avocados:** San Diego and Ventura Counties supply national organic avocados.
- ▶ **Citrus:** Ventura County organic citrus for national fresh and juice markets.
- ▶ **Strawberries & Berries:** coastal organic berries supply LA and national retail chains.
- ▶ **Winter Vegetables:** Coachella Valley supplies organic winter vegetables nationally.

BARRIERS

- Extreme land costs in coastal Southern California create prohibitive farmland access barriers for beginning organic producers and expanding organic operations.
- Water scarcity and ongoing drought conditions across Southern California's irrigated organic production areas create increasing production risk and regulatory uncertainty.
- Urban encroachment on farmland is an ongoing and accelerating threat to the long-term viability of Southern California's organic farm base.

KEY TAKEAWAY

Southern California's organic sector is defined by world-class organic commodity production in avocados, citrus, and berries serving the nation's largest organic consumer market in Los Angeles, making it the highest-value organic geography in the United States.

Resources for Farmers

Southern California organic farmers are supported by the California Department of Food and Agriculture, UC Cooperative Extension, California Certified Organic Farmers (CCOF), and the Southwest TOPP region. These organizations deliver certification, research, technical assistance, and market development resources across the Southern California agricultural landscape.

California Department of Food and Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- CDFA Organic Program: largest state organic regulatory program in the nation
- NRCS California: EQIP Organic Initiative, RCPP, and Organic Transition Assistance
- California Specialty Crop Block Grants for organic avocado, citrus, and berry markets

cdfa.ca.gov/organic

UC Cooperative Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic avocado, citrus, strawberry, and vegetable research and extension specialists
- UC Riverside, UC Davis, and UC Santa Barbara organic systems research programs
- Water use efficiency, soil health, and integrated pest management for organic producers
- 58-county extension network delivering local organic technical assistance across CA

ucanr.edu

CCOF (California Certified Organic Farmers)

FARMER ADVOCACY & PEER LEARNING

- Founded 1973: nation's oldest and largest organic certification organization
- CCOF certifies 3,000+ California operations including major SoCal avocado and citrus farms
- Annual conference, organic policy advocacy, and farmer peer network statewide
- Market development and supply chain connection resources for Southern CA producers

ccof.org

Southwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AZ, CA, HI, NM, NV, TX, UT
- Paid organic mentor matching for avocado, citrus, berry, and vegetable operations
- Workshops on organic transition, Southern CA pest management, and certification
- Market access and LA metro food hub connections for Southern CA organic producers

ccof.org/topp

DID YOU KNOW? SOUTHERN CALIFORNIA

Los Angeles is the largest organic food retail market in the United States by sales volume, with Southern Californians spending more on organic food per capita than consumers in virtually any other major U.S. metro area. This extraordinary concentration of organic purchasing power within reach of Southern California's avocado orchards, citrus groves, and coastal berry farms creates the most favorable farm-to-market conditions for organic producers anywhere in the world. UC Cooperative Extension's organic research and CCOF's certification and advocacy programs are the backbone of the system that connects Southern California's organic farmers to this unmatched market.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

California Department of Food and Agriculture. Organic Program. CDFA, 2023.

California Certified Organic Farmers. CCOF Annual Report. CCOF, 2023.

UC Cooperative Extension. Organic Agriculture Research and Extension. UCANR, 2023.

Utah

Beehive State organic sector built on heritage grains, rangeland beef, and SLC urban market demand



WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT
State Module | August 2026

Utah ranks 31st nationally with 196 certified organic operations and 137,922 certified acres. Utah's organic sector spans arid rangeland beef operations in the west and south, irrigated vegetable and specialty crop farms in the Wasatch Front valleys, and a growing urban direct-market scene in Salt Lake City. The state's strong pioneer agricultural heritage and ethic of land stewardship align naturally with organic principles. Utah State University Extension and the Utah Department of Agriculture provide technical and organizational support for the state's diverse organic producers.

196 CERTIFIED OPERATIONS	137,922 CERTIFIED ACRES	\$32M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE AT A GLANCE

Certified operations	196 (31st nationally)
Certified organic acres	137,922
Organic sales value	\$32 million
Worker employment vs. conventional	+21%
Split operations	44% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand certified organic rangeland beef supply chains leveraging Utah's extensive low-input rangelands and growing premium direct-to-consumer and regional retail demand.
- Develop urban organic agriculture and direct-market infrastructure in the Wasatch Front to serve Salt Lake City's growing and health-conscious consumer population.
- Build organic heritage grain supply chains connecting Utah's specialty grain producers with regional artisan bakers, mills, and natural food ingredient buyers.

TOP ORGANIC COMMODITIES

- ▶ **Beef Cattle:** Utah's rangelands support certified organic and grass-fed beef.
- ▶ **Vegetables:** organic farms in Wasatch Front valleys serve SLC and Provo markets.
- ▶ **Alfalfa & Hay:** Utah irrigated valleys supply western organic dairy feed markets.
- ▶ **Grains & Seeds:** organic heritage wheat and seed crops for specialty grain buyers.

BARRIERS

- Severe water scarcity and ongoing drought conditions limit irrigated organic production potential and create ongoing yield risk for Wasatch Front vegetable operations.
- Arid climate and limited growing season in most of the state restrict organic vegetable production windows without season extension investment.
- Limited organic processing and distribution infrastructure constrains market access for rural Utah organic producers beyond direct-market channels.

KEY TAKEAWAY

Utah's organic sector is uniquely positioned by its combination of vast low-input rangelands for organic beef, Wasatch Front urban market access, and a pioneer agricultural heritage that aligns naturally with organic stewardship values.

Resources for Farmers

Utah organic farmers are supported by the Utah Department of Agriculture and Food, Utah State University Extension, the Utah Farm Bureau organic programs, and the Southwest TOPP region. These partners deliver certification, technical assistance, and market development resources across the state.

Utah Department of Agriculture and Food

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Utah's Own branding and marketing support for certified organic products
- NRCS Utah: EQIP Organic Initiative and Organic Transition Assistance programs
- Agricultural development grants for organic market and value-added processing projects

ag.utah.gov

Utah State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic rangeland beef, vegetable, alfalfa, and grain research and extension specialists
- USU organic systems research and Wasatch Front urban agriculture programs
- Water conservation, soil health, and dryland organic management resources
- 29-county extension network delivering local organic technical assistance statewide

extension.usu.edu

Utah Farmers Union

FARMER ADVOCACY & PEER LEARNING

- Utah farm advocacy organization supporting organic and sustainable producer interests
- Farmer peer learning, networking, and market development programs statewide
- Organic certification guidance and cost-share navigation support for producers
- Beginning farmer programs and organic transition mentorship resources

utahfarmersunion.org

Southwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AZ, CA, HI, NM, NV, TX, UT
- Paid organic mentor matching for rangeland beef, vegetable, and grain operations
- Workshops on organic transition, arid-climate management, and certification in Utah
- Market access and Wasatch Front food hub connections for Utah organic producers

ccof.org/topp

DID YOU KNOW? UTAH

Utah's pioneer agricultural tradition, rooted in cooperative land stewardship and sustainable resource management, has created a cultural foundation that aligns naturally with organic farming values. Many Utah farms have operated with low chemical inputs for generations, reflecting pioneer-era values of careful resource stewardship that reduce the cultural and practical barriers to organic transition. USU Extension's organic research programs and Southwest TOPP's mentorship network are helping Utah producers formalize these traditional practices into certified organic operations that access premium market channels.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Utah Department of Agriculture and Food. Organic Program. UDAF, 2023.

Utah State University Extension. Organic Agriculture Resources. USU Extension, 2023.

Utah Farmers Union. Producer Programs and Advocacy. UFU, 2023.



Appendix A: State Data Sheets

NORTHWEST

Alaska

Building food security in America's last frontier through organic production



A FARMER'S TOOLKIT
State Module | August 2026

Alaska ranks 50th nationally with 14 certified organic operations and 504 certified acres. The state imports roughly 95% of its food, making local organic production a food security priority. Long summer days and clean volcanic soils support strong yields for vegetables, small fruits, and grains.

14	504	~95%	24 hrs
CERTIFIED OPERATIONS	CERTIFIED ACRES	FOOD IMPORTED	PEAK SUMMER DAYLIGHT

STATE PROFILE

AT A GLANCE

Certified operations (est.)	~70
Certified organic acres (est.)	504
Food imported (all categories)	~95%
Growing season (southcentral)	100-130 days
National organic market (2025)	\$76.6 billion

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Grow protected-ag organic production to extend the season and supply year-round institutional buyers.
- Develop local organic food systems to reduce Alaska's 95% food import dependency.
- Leverage TOPP mentorship and EQIP to support transitioning farmers in the Mat-Su Valley.

TOP ORGANIC COMMODITIES

- ▶ **Greenhouse vegetables:** season-extended greens, tomatoes, and cucumbers.
- ▶ **Root vegetables:** cool soils yield carrots, potatoes, and turnips.
- ▶ **Small fruits:** strawberries, raspberries, and native berries for local demand.
- ▶ **Barley & grains:** Mat-Su Valley emerging organic malt and feed grain.

BARRIERS

- Extreme logistics costs for shipping inputs to and products from remote Alaska locations.
- Very short growing season (100-130 days) limits production diversity and total annual output.
- Limited in-state certifiers and processing infrastructure require distance certification navigation.

KEY TAKEAWAY

Alaska's long summer daylight, clean land, and 95% food import dependency create a compelling case for organic development. Greenhouse vegetables and root crops can strengthen food security while building a distinctive Alaska organic identity.

Resources for Farmers

Alaska's organic farmers are supported by UAF Cooperative Extension, the Alaska Division of Agriculture, USDA NRCS, and Northwest TOPP. Together they provide production guidance, certification cost-share, conservation support, and mentorship for transitioning producers statewide.

UAF Cooperative Extension Service

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic production guides for Alaska's climate zones
- Master Gardener and farm advisor network statewide
- High tunnel and greenhouse production support
- Annual Agriculture and Food Systems Conference

uaf.edu/ces

Alaska Division of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Agricultural Revolving Loan Fund for farm capital needs
- Buy Alaska program for state-grown organic market development
- Farm licensing and food safety support

dnr.alaska.gov/ag

USDA NRCS Alaska

FUNDING & CONSERVATION PROGRAMS

- EQIP Organic Initiative: cost-share for organic transition
- High Tunnel System program for season extension
- Soil health and water management conservation planning
- Offices in Anchorage, Palmer, Fairbanks, and Soldotna

nrcs.usda.gov/alaska

Northwest TOPP (NWFSC-led)

MENTORSHIP & TRANSITION SUPPORT

- Connects Alaska farmers with paid organic mentors in the region
- Organic Systems Plan development and certification navigation
- Virtual workshops accessible to remote Alaska producers
- Transition financial planning and cost-share navigation

topp.world

DID YOU KNOW? ALASKA

Alaska imports approximately 95% of its food, yet the state's long summer days create extraordinary growing conditions with some vegetables reaching record size. USDA's TOPP program and EQIP Organic Initiative are available to Alaska farmers and can help close the gap between local production and the state's strong demand for clean, locally grown organic food. UAF Extension provides hands-on guidance for producers across all climate zones.

KEY SOURCES

Organic Trade Association. "Northwest Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

University of Alaska Fairbanks. "Alaska Agriculture Overview." UAF Cooperative Extension, 2025, uaf.edu/ces.

Idaho

Potato country pivoting to organic with one of the West's strongest grain, vegetable, and specialty seed sectors



A FARMER'S TOOLKIT
State Module | August 2026

Idaho ranks 23rd nationally with 352 certified organic operations and 381,575 certified acres. Idaho's organic sector is anchored by a paradox: the nation's largest potato state has a growing organic potato sector, but grain, vegetables, and specialty seeds are where organic acreage is expanding fastest. With \$9.1M in OREI/ORG funding and University of Idaho Extension's statewide reach, Idaho is positioned to become a Northwest organic powerhouse beyond its conventional identity.

352 CERTIFIED OPERATIONS	381,575 CERTIFIED ACRES	\$9.1M OREI / ORG FUNDING	+21% MORE WORKERS VS. CONVENTIONAL
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STATE PROFILE AT A GLANCE

Certified operations	352 (23rd nationally)
Certified organic acres	381,575
OREI / ORG funding (cumulative)	\$9.1M
Worker employment vs. conventional	+21%
Split operations	47% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic potato production to capture premium retail and food service demand for a recognized Idaho brand.
- Transition Snake River Plain grain acres to organic wheat and legumes for food processing and export supply chains.
- Grow organic specialty seed production for the certified organic seed market as demand outpaces supply.

TOP ORGANIC COMMODITIES

- ▶ **Potatoes:** Idaho's potato expertise transfers directly to organic systems.
- ▶ **Grains & Legumes:** organic wheat, barley, and dry beans for food processors.
- ▶ **Vegetables & Onions:** Treasure Valley organic onions and specialty vegetables.
- ▶ **Specialty Seeds:** southern Idaho organic vegetable and cover crop seed production.

BARRIERS

- Irrigation-dependent agriculture faces water scarcity and allocation pressures in drought years.
- Limited organic processing and cold storage infrastructure for organic potatoes and root vegetables.
- High conventional potato contract values create transition income risk for potato-dependent operations.

KEY TAKEAWAY

Idaho's combination of agricultural diversity, large farm scale, and water-access infrastructure creates a premium organic opportunity across potatoes, grains, and specialty seeds. Northwest TOPP mentorship and UI Extension's applied research are the key supports for an organic sector that has only begun to tap Idaho's full potential.

Resources for Farmers

Idaho organic farmers are supported by the Idaho State Department of Agriculture, University of Idaho Extension, the Idaho Organic Alliance, and Northwest TOPP. Together they deliver certification support, transition research, and market connectivity for Idaho's diverse organic sector.

Idaho State Dept of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Idaho Preferred branding program for state-produced organic products
- NRCS Idaho: EQIP Organic Initiative and Transition Assistance programs
- Beginning Farmer and Rancher development loan and grant resources

agri.idaho.gov

University of Idaho Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic potato, grain, vegetable, and seed crop production specialists
- Irrigated organic systems research at Twin Falls Research and Extension Center
- Soil health, cover cropping, and integrated pest management for organic systems
- 44-county extension network delivering statewide organic outreach

extension.uidaho.edu

Idaho Organic Alliance

FARMER ADVOCACY & MARKET DEVELOPMENT

- Statewide organic farmer advocacy and networking organization
- Organic market development and buyer-seller connection programs
- Annual Idaho Organic Conference and producer education events
- Certification guidance and organic transition planning support

idahoorganic.org

Northwest TOPP (WSU-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AK, ID, MT, OR, WA, WY, and Pacific Northwest territories
- Paid organic mentor matching for grain, potato, and vegetable farms
- Workshops on organic transition in irrigated and dryland Western systems
- Market access support for organic potatoes, grains, and specialty seeds

pnwtopp.org

DID YOU KNOW? IDAHO

Idaho produces more conventional potatoes than any other state, yet organic potato demand far exceeds domestic supply. Premium organic potatoes command retail prices two to three times higher than conventional, yet certified organic potato acreage represents less than 1% of Idaho's total. The state's deep expertise in potato agronomy, cold storage, and logistics makes organic transition more economically viable here than almost anywhere else. Northwest TOPP mentorship and UI Extension research on organic potato production are actively de-risking the transition for Idaho growers.

KEY SOURCES

Organic Trade Association. "Idaho Organic Profile." OTA State Advocacy, 2025, ota.com.

Organic Trade Association. "Organic Industry Survey." OTA Market Report, 2025, ota.com.

USDA National Agricultural Statistics Service. "2021 Organic Survey." USDA NASS, 2022, nass.usda.gov.

Idaho State Department of Agriculture. "Idaho Organic Program." ISDA, 2025, agri.idaho.gov.

Montana

Big Sky organic grain giant: top-five nationally in certified acres of wheat, barley, and pulses



A FARMER'S TOOLKIT
State Module | August 2026

Montana ranks 27th nationally with 305 certified organic operations and 451,476 certified acres. Montana's scale in organic grain and pulse production is unmatched in the northern Rockies. Winter wheat, spring wheat, barley, lentils, and chickpeas grown on the northern plains and Hi-Line have made Montana a cornerstone of the U.S. organic food supply chain. The Alternative Energy Resources Organization and Northern Plains Resource Council have championed sustainable and organic agriculture across the state's remote communities for decades.

305 CERTIFIED OPERATIONS	451,476 CERTIFIED ACRES	\$62M ORGANIC SALES	Top 5 U.S. ORGANIC ACREAGE RANK
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STATE PROFILE AT A GLANCE

Certified operations	305 (27th nationally)
Certified organic acres	451,476
Organic sales value	\$62 million
Worker employment vs. conventional	+18%
Split operations	38% of farms

OPPORTUNITIES & BARRIERS OPPORTUNITIES

- Capture more organic grain value through on-state processing investment: organic flour mills, pulse processors, and malt facilities.
- Develop organic rangeland beef supply chains to connect Montana's vast certified pastures with national premium and direct-to-consumer markets.
- Support beginning farmer organic transition on dryland grain acres as the state's farming population ages and land transfers accelerate.

TOP ORGANIC COMMODITIES

- ▶ **Wheat:** Hi-Line organic wheat supplies national flour millers at scale.
- ▶ **Lentils & Pulses:** top U.S. organic lentils, chickpeas, and dry peas for export.
- ▶ **Barley:** established organic barley for malt and food applications.
- ▶ **Beef Cattle:** vast rangeland supports certified organic and grass-fed beef.

BARRIERS

- Remote geography and long distances to processors and markets increase transportation costs and reduce organic premium capture for Montana producers.
- Dryland farming systems face high weather variability and drought risk that can destabilize organic grain yields and revenue during transition years.
- Limited organic processing and aggregation infrastructure means much of Montana's organic grain leaves the state as raw commodity rather than value-added product.

KEY TAKEAWAY

Montana's more than 1.1 million certified organic acres make it one of the foundational supply states for the U.S. organic grain and pulse industry. Investment in on-state organic processing and value-added infrastructure would dramatically increase the economic return of this production base to Montana farm families.

Resources for Farmers

Montana organic farmers are supported by the Montana Department of Agriculture, Montana State University Extension, the Alternative Energy Resources Organization, and the Northwest TOPP region. These partners provide certification, research, technical assistance, and market development resources across Montana's vast agricultural landscape.

Montana Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Montana Grown branding program for certified organic product promotion
- NRCS Montana: EQIP Organic Initiative, Transition Assistance, and RCPP programs
- Agricultural marketing programs supporting organic grain and pulse export development

agr.mt.gov

Montana State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic dryland grain, pulse, and livestock production research and extension specialists
- MSU Northern Agricultural Research Center trials on organic wheat, barley, and pulse systems
- Soil health, cover cropping, and no-till transition support for organic grain producers
- Statewide extension network delivering local organic technical assistance in all counties

msuextension.org

Alternative Energy Resources Org. (AERO)

FARMER ADVOCACY & PEER LEARNING

- Montana's primary sustainable and organic agriculture advocacy and education organization
- Annual Montana Organic Conference and farm tour program
- Organic certification guidance and cost-share navigation support for producers
- Farmer networking, peer learning, and rural community development programs

aeromt.org

Northwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AK, ID, MT, OR, WA, WY
- Paid organic mentor matching for dryland grain, pulse, and beef operations
- Workshops on organic grain transition, certification, and dryland systems management
- Market access support for Montana organic grain and beef producers

ccof.org/topp

DID YOU KNOW? MONTANA

Montana's northern plains grow more certified organic lentils and pulse crops than virtually any other state in the U.S., supplying national and international markets with organic protein ingredients. Organic lentils, chickpeas, and dry peas thrive in Montana's dryland conditions and fix nitrogen naturally, reducing input costs during organic transition. With global demand for plant-based organic protein ingredients growing rapidly, Montana pulse farmers are positioned at the supply end of one of the fastest-growing segments of the organic food market.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.
Montana Department of Agriculture. Montana Organic Program. MDA, 2023.
Alternative Energy Resources Organization. AERO Programs and Services. AERO, 2023.
Montana State University Extension. Organic Agriculture Research. MSU Extension, 2023.

Oregon

Pacific Northwest organic leader: top-ten nationally in hazelnut, berries, grain, and dairy



A FARMER'S TOOLKIT
State Module | August 2026

Oregon ranks 12th nationally with 836 certified organic operations and 308,025 certified acres. Oregon is one of the nation's most mature and diverse organic states, with organic production spanning the Willamette Valley's intensive vegetable, berry, and hazelnut operations; eastern Oregon's vast organic grain and rangeland beef; and a coastal dairy and specialty crop sector. Portland's food culture and the state's deep cooperative infrastructure create exceptional market access and organizational strength. Oregon Tilth, one of the nation's oldest organic certifiers, and Oregon State University's organic research programs are national leaders.

836 CERTIFIED OPERATIONS	308,025 CERTIFIED ACRES	\$273M ORGANIC SALES	Top 10 U.S. ORGANIC STATE
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STATE PROFILE AT A GLANCE

Certified operations	836 (12th nationally)
Certified organic acres	308,025
Organic sales value	\$273 million
Worker employment vs. conventional	+27%
Split operations	52% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand certified organic hazelnut acreage to meet rapidly growing demand from organic chocolate, confectionery, and natural food ingredient manufacturers.
- Develop eastern Oregon organic grain processing capacity to capture more value from the region's substantial certified organic wheat and barley production.
- Grow organic agritourism and direct-market farm operations in the Willamette Valley to serve Portland's world-class food culture and tourist economy.

TOP ORGANIC COMMODITIES

- ▶ **Hazelnuts:** Oregon grows 99% of U.S. hazelnuts; organic for premium buyers.
- ▶ **Berries & Vegetables:** Willamette Valley organic berries and vegetables for NW markets.
- ▶ **Wheat & Grain:** eastern Oregon organic wheat and pulses supply regional processors.
- ▶ **Dairy & Beef:** organic coastal dairy and rangeland beef supply regional co-ops.

BARRIERS

- High land values in the Willamette Valley create significant entry barriers for beginning organic producers seeking to farm in the state's prime agricultural zone.
- Eastern Oregon's remote geography and limited organic processing infrastructure increase transportation costs and reduce premium capture for organic grain producers.
- Labor availability and cost in specialty crop regions create ongoing operational challenges, particularly for harvest-intensive organic berry and vegetable operations.

KEY TAKEAWAY

Oregon's organic sector is a national model of diversity, depth, and organizational strength. From Willamette Valley berries and hazelnuts to eastern Oregon grain and rangeland beef, Oregon has built a complete organic ecosystem supported by world-class certifiers, research institutions, and farmer organizations.

Resources for Farmers

Oregon organic farmers are supported by the Oregon Department of Agriculture, Oregon State University Extension, Oregon Tilth Certified Organic, and the Northwest TOPP region. These organizations deliver certification, research, technical assistance, and market development resources across Oregon's diverse agricultural landscape.

Oregon Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Oregon Dept of Agriculture accredited certifier and cost-share program administration
- NRCS Oregon: EQIP Organic Initiative, RCPP, and Organic Transition Assistance programs
- Oregon agricultural development grants for organic processing and value-added projects

oregon.gov/ODA

Oregon State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic hazelnut, berry, vegetable, grain, dairy, and beef research and extension
- OSU Center for Small Farms and Community Food Systems organic resources
- Willamette Valley and eastern Oregon organic systems on-farm demonstration programs
- 36-county extension network delivering local organic technical assistance statewide

extension.oregonstate.edu

Oregon Tilth Certified Organic

FARMER ADVOCACY & PEER LEARNING

- One of the nation's oldest and most respected organic certification organizations
- Oregon Tilth certifies thousands of operations across Oregon and nationally
- Annual Oregon Tilth Organic Farmer Conference and producer education programs
- Organic policy advocacy, research support, and farmer community building statewide

tilth.org

Northwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AK, ID, MT, OR, WA, WY
- Paid organic mentor matching for hazelnut, berry, grain, dairy, and beef operations
- Workshops on organic transition, Pacific Northwest pest management, and certification
- Market access and Pacific Northwest food hub connections for Oregon organic producers

ccof.org/topp

DID YOU KNOW? OREGON

Oregon produces over 99% of all hazelnuts grown in the United States, and a growing number of these orchards are certified organic, making Oregon the sole domestic source of organic hazelnuts for major chocolate and natural food brands. Organic hazelnut demand is surging as consumers seek certified organic versions of hazelnut-chocolate spreads, baking ingredients, and plant-based snacks. Oregon's Willamette Valley hazelnut growers who pursue organic certification gain access to premium buyers with no domestic competition. OSU Extension's hazelnut research program and Northwest TOPP's mentorship are helping producers navigate the transition to certified organic hazelnut production.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Oregon Department of Agriculture. Organic Certification Program. ODA, 2023.

Oregon Tilth Certified Organic. Annual Report and Programs. Oregon Tilth, 2023.

Oregon State University Extension. Organic Agriculture Research. OSU Extension, 2023.

Washington

Evergreen State organic leader: top-five nationally in apples, hops, berries, and dairy



A FARMER'S TOOLKIT
State Module | August 2026

Washington ranks 5th nationally with 1,223 certified organic operations and 109,802 certified acres. Washington is one of the premier organic states in the nation, anchored by the Yakima Valley's extraordinary organic tree fruit and hop production, the Palouse's organic wheat and pulse crops, western Washington's organic dairy and vegetable sectors, and the booming Seattle metro's exceptional organic consumer demand. Washington State University's organic research programs and the Washington State Department of Agriculture provide world-class technical and regulatory infrastructure for one of the most economically significant organic sectors in the country.

1,223 CERTIFIED OPERATIONS	109,802 CERTIFIED ACRES	\$402M ORGANIC SALES	#4 U.S. ORGANIC RANK
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STATE PROFILE AT A GLANCE

Certified operations	1,223 (5th nationally)
Certified organic acres	109,802
Organic sales value	\$402 million
Worker employment vs. conventional	+28%
Split operations	53% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Expand organic hop acreage to meet surging demand from U.S. craft breweries committed to organic ingredient sourcing, where Washington supply currently falls short of demand.
- Develop Palouse organic grain value-added processing capacity to supply Pacific Northwest artisan bakers, pasta makers, and natural food manufacturers with Washington-grown certified grain.
- Leverage Seattle's extraordinary organic consumer market to support farm-to-institution and food hub supply chains connecting western WA organic producers with urban buyers.

TOP ORGANIC COMMODITIES

- ▶ **Apples & Tree Fruit:** Yakima Valley and Wenatchee supply national organic apple retail.
- ▶ **Hops:** Yakima Valley certified organic hops supply craft brewing industry.
- ▶ **Wheat & Pulses:** Palouse organic wheat, lentils, and peas supply national mills.
- ▶ **Dairy & Vegetables:** Skagit Valley organic vegetables and western dairy supply Seattle.

BARRIERS

- High land values across the Yakima Valley and western Washington limit farmland access for beginning organic tree fruit and vegetable producers.
- Labor availability and cost for harvest-intensive organic tree fruit, hop, and vegetable operations create significant ongoing operational challenges.
- Eastern Washington's remote geography and cold-storage infrastructure gaps increase distribution costs for Palouse organic grain and pulse producers.

KEY TAKEAWAY

Washington's organic sector is a national model of commercial scale and market integration, with \$402 million in organic sales anchored by world-class organic apple and hop production, a vibrant Palouse grain belt, and the extraordinary market access of the Seattle metro consumer economy.

Resources for Farmers

Washington organic farmers are supported by the Washington State Department of Agriculture, Washington State University Extension, the Washington State Farmers Market Association, and the Northwest TOPP region. Together they deliver a comprehensive ecosystem of certification, research, technical assistance, and market development resources.

Washington State Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- WSDA Organic Program: one of the most rigorous accredited state certifiers nationally
- NRCS Washington: EQIP Organic Initiative, RCPP, and Organic Transition Assistance
- Washington agricultural development grants for organic processing and market projects

agr.wa.gov/organic

Washington State University Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic apple, hop, grain, pulse, dairy, and vegetable research and extension specialists
- WSU organic systems research including the acclaimed Farming Systems Project
- Integrated pest management, soil health, and organic transition resources statewide
- 39-county extension network delivering local organic technical assistance across WA

extension.wsu.edu

Tilth Alliance

FARMER ADVOCACY & PEER LEARNING

- Washington's premier organic and sustainable agriculture advocacy and education organization
- Annual Tilth Alliance Conference and farm tour programs in the Pacific Northwest
- Organic certification guidance, cost-share navigation, and producer support
- Farmer peer learning networks, mentorship, and market development in Washington state

tilthalliance.org

Northwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AK, ID, MT, OR, WA, WY
- Paid organic mentor matching for apple, hop, grain, dairy, and vegetable operations
- Workshops on organic transition, Pacific Northwest pest management, and certification
- Market access and Seattle food hub connections for Washington organic producers

ccof.org/topp

DID YOU KNOW? WASHINGTON

Washington's Yakima Valley produces the majority of all organic hops grown in the United States, making it the essential supply source for the nation's rapidly growing organic craft brewing industry. With the U.S. craft beer market generating over \$28 billion annually and growing numbers of craft breweries seeking certified organic ingredients, Yakima Valley organic hop farmers are positioned at the supply end of one of American agriculture's most dynamic premium markets. WSU Extension's hop research program and Northwest TOPP's mentorship network are supporting Yakima Valley producers in converting conventional hop yards to certified organic production.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Washington State Department of Agriculture. Organic Program. WSDA, 2023.

Tilth Alliance. Programs and Resources. Tilth Alliance, 2023.

Washington State University Extension. Organic Agriculture Research. WSU Extension, 2023.

Wyoming

Cowboy State grows organic on high-altitude rangeland beef and dryland grain traditions



A FARMER'S TOOLKIT
State Module | August 2026

Wyoming ranks 44th nationally with 79 certified organic operations and 138,183 certified acres. Wyoming's organic sector is defined by scale and terrain: vast rangeland in the south and east supporting certified organic and grass-fed beef operations, dryland grain in the northeast, and specialty organic vegetable farms near Cheyenne, Casper, and Jackson Hole. The state's historically low chemical input use on rangeland and the strong ethic of land stewardship in ranching communities create natural conditions for organic transition. Wyoming Business Council and the University of Wyoming Extension provide the primary technical support for organic producers.

79 CERTIFIED OPERATIONS	138,183 CERTIFIED ACRES	\$16M ORGANIC SALES	Growing SECTOR TRAJECTORY
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STATE PROFILE AT A GLANCE

Certified operations	79 (44th nationally)
Certified organic acres	138,183
Organic sales value	\$16 million
Worker employment vs. conventional	+18%
Split operations	36% of farms

OPPORTUNITIES & BARRIERS

OPPORTUNITIES

- Develop certified organic grass-fed beef supply chains leveraging Wyoming's vast native rangeland, nationally recognized beef quality, and Jackson Hole premium buyer proximity.
- Expand organic dryland grain production in northeast Wyoming and connect producers with regional organic grain processors in the northern plains.
- Build Jackson Hole organic direct-market connections between Wyoming producers and the region's high-income resort community and visitor economy.

TOP ORGANIC COMMODITIES

- ▶ **Beef Cattle:** high-altitude rangelands support certified organic grass-fed beef.
- ▶ **Wheat & Grain:** organic dryland winter wheat supplies regional grain processors.
- ▶ **Hay & Alfalfa:** organic hay and alfalfa in irrigated valleys for western dairy feed.
- ▶ **Vegetables & Specialty:** organic vegetable farms near Cheyenne and Jackson Hole serve markets.

BARRIERS

- Extreme weather including late frosts, hail, drought, and early winter create significant production risk, particularly during the organic transition period.
- Very low population density and limited organic processing infrastructure constrain market access for Wyoming organic producers beyond direct-market channels.
- Geographic isolation and long distances to organic processors and major markets increase transportation costs and reduce organic premium capture.

KEY TAKEAWAY

Wyoming's extensive native rangeland and strong ranching heritage create a natural foundation for certified organic grass-fed beef development, while Jackson Hole's premium resort economy provides a high-value organic market opportunity that few other rural states can access.

Resources for Farmers

Wyoming organic farmers are supported by the Wyoming Department of Agriculture, University of Wyoming Extension, the Wyoming Business Council, and the Northwest TOPP region. These partners deliver certification, technical assistance, and market development resources across the state's vast agricultural landscape.

Wyoming Department of Agriculture

STATE AGENCY PROGRAMS

- Organic Certification Cost Share: federal pass-through, up to \$500/yr
- Wyoming Choice branding and marketing support for certified organic products
- NRCS Wyoming: EQIP Organic Initiative and Organic Transition Assistance programs
- Agricultural development grants for organic market infrastructure and processing

wyoag.gov

University of Wyoming Extension

RESEARCH, EXTENSION & TECHNICAL ASSISTANCE

- Organic rangeland beef, dryland grain, hay, and vegetable research and extension
- UW high-altitude organic systems research and dryland farming programs
- Soil health, cover crops, and rangeland management for organic transition
- 23-county extension network delivering local organic technical assistance statewide

uwyo.edu/uwextension

Wyoming Business Council

FARMER ADVOCACY & PEER LEARNING

- Wyoming state economic development agency supporting organic and agricultural enterprises
- Farm business planning, market development, and organic enterprise grant programs
- Beginning farmer and rancher support programs and organic transition resources
- Connections to Wyoming agricultural loan and grant programs for organic producers

wyomingbusiness.org

Northwest TOPP (CCOF-led)

MENTORSHIP & WORKFORCE DEVELOPMENT

- Serves AK, ID, MT, OR, WA, WY
- Paid organic mentor matching for rangeland beef, grain, and vegetable operations
- Workshops on organic transition, high-altitude management, and certification
- Market access and Pacific Northwest buyer connections for Wyoming organic producers

ccof.org/topp

DID YOU KNOW? WYOMING

Jackson Hole, Wyoming is home to one of the highest-income resort communities in the United States, with a concentrated population of affluent visitors and residents who prioritize premium, locally sourced, and organic food. Wyoming organic producers within reach of Jackson Hole access buyers with exceptional willingness to pay for certified organic, locally raised beef, vegetables, and specialty products. The combination of the Teton County premium market and the broader resort visitor economy creates a direct-to-consumer organic sales opportunity that significantly exceeds what Wyoming's population alone would suggest.

KEY SOURCES

USDA National Agricultural Statistics Service. 2022 Census of Agriculture. USDA NASS, 2024.

Wyoming Department of Agriculture. Organic Program. WDA, 2023.

University of Wyoming Extension. Organic Agriculture Resources. UW Extension, 2023.

Wyoming Business Council. Agricultural Development Programs. WBC, 2023.



Appendix B: Regional Handouts

NORTHEAST

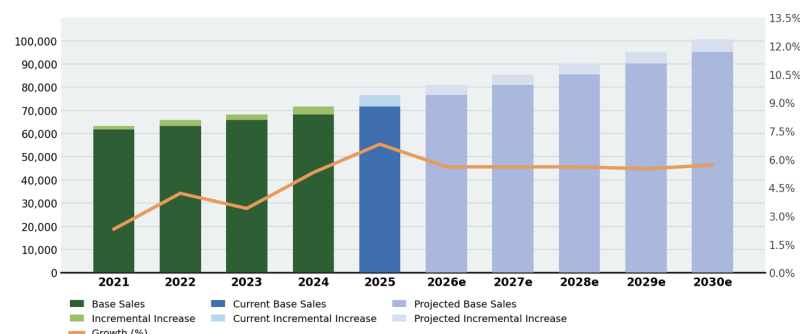
Today's Organic Market Opportunities

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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
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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 Northeast Organic Advantage

A Practical Guide for Farmers & Producers

The Northeast is one of the most mature, dynamic, and resilient organic markets in the United States. With high consumer awareness, dense population centers, and a long history of diversified farming, the region is uniquely positioned to drive the next wave of regionally rooted organic growth. Spanning seven states across New England and the broader Northeast, this compact but high-performing region combines strong market demand, engaged institutions, and climate-adapted cropping systems — offering fertile ground for producers looking to expand, diversify, or transition into organic.

A Region Defined by Diversity, Proximity, and Deep Consumer Engagement

Organic production in the Northeast is strengthened by its tight connection between farms and consumers. States such as Vermont, Maine, Connecticut, and Massachusetts boast some of the highest per-capita organic adoption in the country, while New York remains a top-five state in organic acreage and sales. The region is home to more than **3,900 organic businesses**, serving consumer markets that consistently report **87–89% household organic participation**.

Producers benefit from:

- **High-value markets** within close reach — New York City, Boston, Hartford, Providence, and Portland
- **A legacy of small- and mid-scale diversified farms**, supported by CSAs, farmers markets, co-ops, and institutional buyers
- **Strong organic acreage density**, with several states ranking among the top in percentage of farmland that is certified organic
- **Robust policy and technical support**, led by institutions such as MOFGA, NOFA chapters, and the Rodale Institute
- **Growing producer momentum**, with notable shares of farms in Maine and Rhode Island planning organic expansion

Collectively, these strengths create one of the nation's most engaged and resilient organic ecosystems.

STATE	CERTIFIED OPERATIONS (2026)	CERTIFIED ACRES (2026)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Connecticut	166	34,790	Tomatoes, squash, lettuce	87% of households buy organic
Maine	474	70,772	Milk, maple syrup, blueberries	4th nationally in share of organic farmland (11%); \$8.5M OREI/ORG funding
Massachusetts	317	4,082	Milk, lettuce, cranberries	85% of households buy organic; 50% of counties are "organic hotspots"
New Hampshire	124	11,268	Milk, maple syrup, tomatoes	89% of households buy organic
New York	2,068	985,648	Milk, eggs, cattle	2nd nationally in operations and acres; \$31M in OREI/ORG funding
Rhode Island	48	172	Tomatoes, onions, lettuce	88% of households buy organic
Vermont	797	200,989	Milk, maple syrup, cattle	88% of households buy organic; \$9M in OREI/ORG funding

What the Region Produces — and Where It's Headed



Diversified Specialty Crops & Value-Added Products

The Northeast's climate and market proximity support a thriving specialty crop sector including berries, leafy greens, tomatoes, herbs, and high-value vegetables. Protected and controlled-environment agriculture — from high tunnels to greenhouses — plays a major role in extending seasons and meeting year-round demand. Small fruits, storage crops, and specialty value-added foods (maple, jams, fermented products, syrups) contribute to stable margins and strong regional identity.

Grains & Dairy: Cornerstones of the Northeast Organic Economy

Dairy remains one of the region's defining organic sectors, especially in Vermont, New York, and Maine. Organic grains, particularly feed grains, continue to play a critical role in supporting dairy and livestock systems across the region. Strengthening grain and feed production offers major strategic value: reducing dependence on national imports while stabilizing regional dairy supply chains.

Creative, High-Margin Niches & Protected Agriculture

Producers across the Northeast are increasingly expanding into mushrooms, greenhouse greens, berries, herbs, and winter storage crops — all supported by nearby consumer markets that prioritize freshness, transparency, and sustainably grown products. Investments in protected agriculture can turn climate limitations into competitive advantages by enabling more consistent, year-round supply.

Regional Challenges — and Producer-Led Solutions

The Northeast's opportunities are closely tied to addressing several structural challenges:

- **Limited storage and processing capacity**, particularly for grains, vegetables, and dairy
- **Dependency on imported feed grains**, creating cost and supply vulnerability
- **Labor shortages**, especially for diversified vegetable and specialty crop operations
- **Short growing seasons**, requiring season extension to meet demand consistently

Producers and regional partners are advancing solutions that include:

- **Expanding protected agriculture** (hoop houses, greenhouses) to lengthen seasons and boost profitability
- **Building out regional processing**, from grain milling to value-added specialty foods
- **Strengthening feed grain programs** to support dairy and livestock systems
- **Developing workforce and training pipelines** for year-round organic farm employment
- **Scaling up storage and aggregation**, improving access to institutional and wholesale markets

These collective strategies help transform limitations into opportunities for resilient growth.

Looking Ahead: A Region Positioned to Lead the Next Phase of Organic

Consumer demand for organic in the Northeast continues to grow at twice the rate of the overall food market. With strong regional identity, deep-rooted local food cultures, and high trust in organic integrity, the Northeast is ideally positioned to strengthen regional supply chains and reduce dependence on imported organic foods. States such as Vermont, Maine, and Connecticut lead the nation in organic acreage share, while New York ranks #2 in number of organic businesses — showing both depth and breadth of opportunity.

Whether expanding berries and leafy greens, growing local grain and feed systems, or investing in year-round protected agriculture, Northeast producers are shaping a future where organic supply is more local, resilient, and aligned with strong regional values. By combining market proximity, policy support, and the region's longstanding commitment to sustainable agriculture, the Northeast is poised to remain a national leader in organic innovation and growth.

WORKING EFFECTIVELY WITH BUYERS

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Come in with your eyes wide open."*

— Kenny, Natural Foods Retail Buyer

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What Do Buyers Want?

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

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Finding and Connecting with Prospective Buyers

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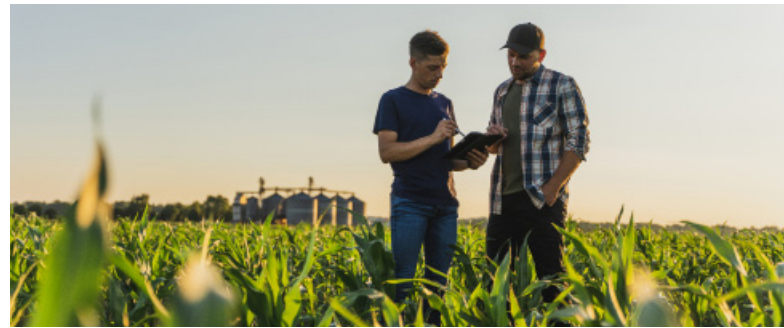
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Distributor/Wholesale Buyers

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.

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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.



Appendix B: Regional Handouts

MID-ATLANTIC

Advancing Regional Organic Markets

A FARMER'S TOOLKIT

**NORTHEAST/
MID-ATLANTIC**
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

AUGUST 2026

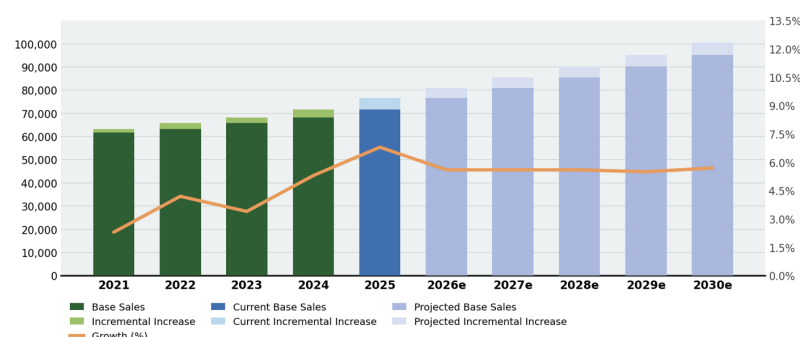
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Demand for organic products continues to grow, and every region has a different mix of strengths and gaps that matter for farms moving into organic.



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.

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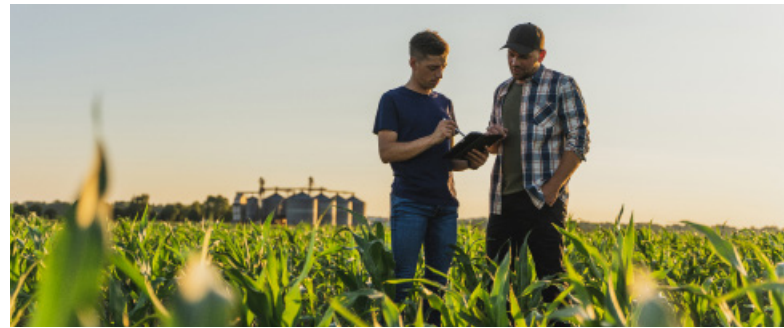
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THE ORGANIC SPECIALISTS

NATIONAL
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

**ORGANIC
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ASSOCIATION**

**RODALE
INSTITUTE**



MIDWEST
TRANSITION TO ORGANIC
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SOUTHEAST





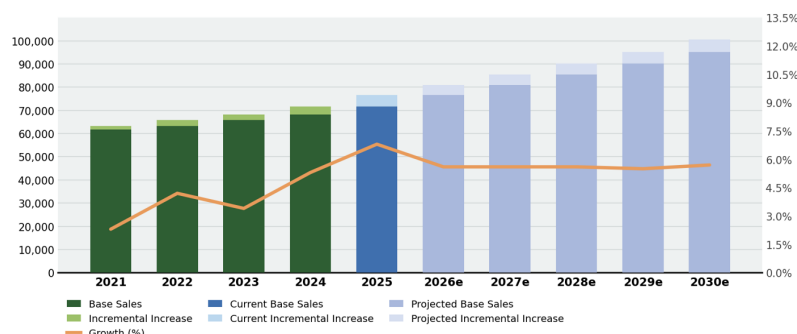
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The Southeast Organic Advantage

A Practical Guide for Farmers & Producers

Organic agriculture in the Southeast is gaining steady ground, propelled by strong consumer demand, a year-round growing climate, and a diverse agricultural heritage. While organic acreage is still expanding relative to other regions, the Southeast's long growing season, crop diversity, and expanding infrastructure make it one of the most promising organic growth frontiers in the United States. **Florida, Georgia, and North Carolina** anchor the region's production and sales, supported by strong retail markets in Atlanta, Miami, Charlotte, and Raleigh. For producers, this region offers unmatched climatic potential and a clear runway for scaling organic systems.

A Region Defined by Climate Advantage, Market Access & Growth Potential

Across the Southeast, organic production benefits from favorable temperatures, multiple cropping windows, and proximity to major consumer hubs. The region includes more than 145,000 certified organic acres, with ~1,900 certified farms and processors contributing nearly \$1.2 billion in annual organic sales. Florida's winter vegetables, Georgia's poultry and peanuts, and North Carolina's diversified farms underscore the region's broad agricultural base and mounting momentum behind organic transition.

Producers benefit from:

A uniquely long growing season, enabling year-round production for regional and national markets.

- **Expanding consumer demand**, particularly in metro centers outpacing national organic sales trends
- **Diverse crops and microclimates**, allowing both staple commodities and high-value specialty products
- **Emerging infrastructure**, including greenhouses, high tunnels, feed systems, and regional processing
- **Ample conventional acreage ready for conversion**, creating major potential for rapid acreage growth

Collectively, the Southeast offers a rare combination of climatic advantage and market access that positions it as a future leader in U.S. organic supply.

STATE	CERTIFIED OPERATIONS (2026)	CERTIFIED ACRES (2026)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Alabama	38	873	Milk, cattle, tomatoes	71% of households buy organic
Florida	750	53,033	Strawberries, tomatoes, blueberries	Organic farms hire 450% more workers than conventional; 82% of households buy organic
Georgia	373	22,135	Eggs, blueberries, onions	47% of farms plan expansion in next five years
Louisiana	51	6,771	Milk, cattle, rice	73% of households buy organic
Mississippi	28	6,681	Milk, cattle, corn	70% of households buy organic
North Carolina	554	50,307	Chicken, eggs, tobacco	Organic farms hire 120% more workers than conventional; strong livestock and poultry sector
South Carolina	117	6,387	Bell peppers, squash, tomatoes	48% of farms plan expansion over five years

What the Region Produces — and Where It's Headed



Produce & Specialty Crops: Year-Round Market Advantage

The Southeast's climate supports continuous or extended-season production of high-value crops. Florida excels in winter vegetables and fruit, helping bridge seasonal supply gaps for national distribution. North Carolina and South Carolina are expanding protected agriculture and diversified vegetable systems to serve both regional retailers and local markets. Across the region, producers are shifting toward berries, tomatoes, leafy greens, herbs, and other specialty crops that command strong premiums and fit well with the climate.

Grains, Peanuts & Feed Systems: Building Regional Self-Sufficiency

Georgia remains a national leader in organic peanuts, supported by growing rotational crop capacity. Expanding organic grains — particularly feed grains — is a top priority for strengthening the region's poultry and livestock sectors. Alabama and Mississippi are developing integrated poultry–grain systems, while North Carolina's emerging grain and feed infrastructure supports expanding livestock markets and reduces reliance on imported organic grain.

Livestock & Value-Added Systems: Anchors of Regional Production

Poultry is the dominant organic animal sector in the region, especially in Georgia and Arkansas-adjacent supply chains. Dairy, eggs, and grass-fed livestock systems are growing across North Carolina, Tennessee, and Alabama, supported by rising consumer demand and expanding regional processors. Value-added opportunities — from pasture-based dairy to on-farm processing — are becoming more accessible as states invest in regional infrastructure.

Regional Challenges — and Producer-Led Solutions

The Southeast's opportunities are closely tied to addressing several structural challenges:

- **Insufficient feed and processing infrastructure**, which limits poultry and livestock expansion
- **Climate challenges**, including heat, humidity, and hurricanes — requiring resilient production systems
- **Labor shortages**, especially in high-intensity specialty crop sectors
- **Limited regional supply chains**, resulting in dependence on outside markets for grain, feed, and processing

Across the region, producers and partners are advancing targeted solutions:

- **Onshore feed production and processing** to reduce reliance on imported grains and lower production costs
- **Expand protected agriculture**, including greenhouses and tunnels, to protect crops, extend seasons, and stabilize yields
- **Invest in value-added processing**, including dairy, poultry, and produce facilities that keep more value in the region
- **Support transition and certification**, especially for large tracts of conventional row-crop land well-suited for organic conversion
- **Build regional brands** linking “Southeast Grown” organics to strong local consumer identity and year-round markets

Strategic investment in these areas will significantly increase farm profitability and regional resilience.

Looking Ahead: The Southeast as America's Next Organic Growth Frontier

With its year-round climate, high-demand consumer corridor, and increasing institutional support, the Southeast is positioned to become a major engine for U.S. organic agriculture. Expansion of feed grains, protected agriculture, and diversified specialty crops will reduce national import dependence and strengthen local economies. The region's combination of climate-smart potential, large-scale conversion opportunities, and strong urban markets make it uniquely equipped to scale both high-volume staples and premium specialty crops.

Whether producing winter vegetables, scaling organic poultry, expanding peanuts and rotational crops, or investing in protected agriculture and feed infrastructure, Southeast producers are on the forefront of building a resilient, profitable organic future rooted in regional strengths and year-round production potential.

WORKING EFFECTIVELY WITH BUYERS

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MIDWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

Appendix B: Regional Handouts

MIDWEST





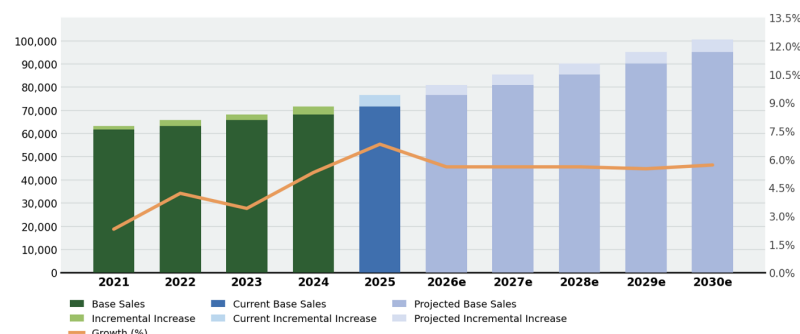
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SEGMENT	GROWTH	KEY TRENDS	IMPLICATIONS FOR GROWERS
Meat, Poultry, Seafood	22.5%	Organic beef up +44.3% — now the #1 segment	High-opportunity segment for U.S. livestock producers. Demand for certified organic meat is outpacing domestic supply, opening 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.

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

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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



MIDWEST

TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

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 Midwest Organic Advantage

A Practical Guide for Farmers & Producers

The Midwest — stretching from **Minnesota and Iowa to Kentucky and Arkansas** — represents the largest contiguous block of organic acreage and economic activity in the United States. With more than 2.5 million organic acres and nearly \$1.9 billion in annual sales, this region is a powerhouse for organic grains, dairy, eggs, and livestock, supported by deep farming traditions and a strong infrastructure footprint. As household demand grows and more farms express readiness to transition, the Midwest is poised to lead the next era of national organic expansion.

A Region Built on Scale, Tradition, and Innovation

The Midwest's organic strength comes from its mix of high-volume field crops, mature dairy and egg systems, and growing specialty markets. Wisconsin anchors the region as the national leader in organic dairy, while Iowa and Illinois dominate organic corn, soybeans, and egg production. Arkansas, Missouri, and Indiana add depth in poultry and animal product sales. Michigan, Minnesota, and Ohio provide a strong blend of crops, livestock, and consumer demand. Meanwhile, Kentucky and Tennessee — smaller but fast-growing — offer expanding opportunities in eggs, tomatoes, milk, forage, and regional produce systems.

Producers across the region benefit from:

- **Massive acreage potential**, with more than **1.29 million certified acres** and thousands of farms planning expansion
- **Mature commodity systems**, including the nation's top organic milk, egg, and soybean production
- **Deep infrastructure**, from elevators and processors to bottling lines and feed mills
- **High consumer demand**, with major metro markets like Chicago, Minneapolis, Detroit, and Cincinnati anchoring regional sales

Strong R&D and extension support driving soil health, regenerative systems, and organic transition readiness. Together, these strengths make the Midwest an essential engine for national organic supply.

STATE	CERTIFIED OPERATIONS (2026)	CERTIFIED ACRES (2026)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Arkansas	220	21,624	Eggs, chickens, tomatoes	8th nationally for organic animals; 73% of households buy organic
Illinois	843	149,243	Corn, soybeans, eggs	41% of organic farms plan expansion
Indiana	1,028	97,292	Milk, eggs, grains	7th in nation for animal and egg sales (\$59M, \$57M)
Iowa	907	197,192	Corn, soybeans, eggs	5th in nation for farmgate sales (\$159M)
Kentucky	251	19,435	Eggs, milk, soybeans	78% of households buy organic
Michigan	785	159,396	Corn, soybeans, dry beans	83% of households buy organic
Minnesota	852	217,315	Milk, corn, soybeans	\$16.5M in OREI & ORG funding supports R&D
Missouri	684	64,824	Eggs, soybeans, corn	#1 in U.S. for organic egg sales (\$142M)
Ohio	1,008	118,050	Eggs, milk, corn	7th nationally in total organic operations
Tennessee	119	5,338	Eggs, corn, tomatoes	Expanding organic vegetable sector
Wisconsin	1,617	241,080	Milk, eggs, cattle	4th in operations, 10th in acres; \$107M milk sales

What the Region Produces — and Where It's Headed



Grains & Oilseeds:

The Core of U.S. Organic Feed Systems

As the heart of the U.S. Corn Belt, the Midwest leads the nation in organic corn, soybeans, and small grains. Iowa, Illinois, Minnesota, and Michigan contribute more than 600,000 combined acres of organic corn and soy, with robust storage, processing, and transport infrastructure already in place. Opportunities include expanding rotational legumes (dry beans, peas), strengthening organic small-grain systems, and connecting grain growers directly to the region's livestock, dairy, and poultry clusters.

Dairy, Eggs & Livestock:

A Mature and Expanding Sector

The Midwest's livestock systems are among the most advanced in the country. Wisconsin ranks #1 in organic milk, while Missouri leads in organic egg sales. Indiana, Kentucky, and Arkansas all exceed \$50 million in annual organic animal product revenue. Continued growth is expected as more producers shift toward pasture-based livestock systems and as demand for regionally sourced dairy and eggs rises across the Midwest.

Specialty & Regional Crops:

Diverse Markets with Strong Demand

Beyond commodities, the region is seeing increasing interest in produce, legumes, tree fruit, and greenhouse-grown crops. Michigan and Wisconsin excel in beans and tree fruit; Ohio and Wisconsin lead in regional hay; and Arkansas and Tennessee continue to expand tomato and high-tunnel vegetable production. Local and regional grocers, CSAs, and food hubs present growing market channels for diversified specialty producers, community markets, improving local food security and season extension.

Regional Challenges — and Producer-Led Solutions

While the Midwest is well-positioned for expansion, several systemic challenges shape the next chapter of growth:

- **Underused infrastructure** — elevators, processors, and dairy facilities that could serve organic markets with investment
- **Gaps in grain and feed coordination**, especially near dairy and poultry hubs
- **Limited value-added processing** for meat, milk, grains, and specialty crops
- **Transition barriers**, including risk, certification readiness, and market alignment

These challenges also highlight major opportunities:

- **Reinvest in regional processing and bottling**, keeping organic value closer to home
- **Strengthen grain-to-feed supply chains**, especially around dairy, poultry, and egg clusters
- **Support crop rotation and soil-health programs** that help farms convert row-crop acres to organic
- **Build region-specific brands and markets**, leveraging high-demand metro centers
- **Develop cooperative and shared-infrastructure models** that increase farmer profitability

When producers, processors, and buyers coordinate, the Midwest becomes more self-sufficient and more resilient.

Looking Ahead: A Strategic Driver for the Future of Organic

With vast acreage, top-ranked production systems, strong demand, and thousands of farms ready to transition, the Midwest is positioned to define the next wave of U.S. organic growth. Its ability to supply foundational commodities like grains, milk, eggs, and livestock — while scaling climate-resilient and value-added systems — makes it indispensable to the national organic supply chain.

Whether expanding crop rotations, strengthening livestock systems, reinvesting in processing, or tapping into large metro markets, Midwest producers are well positioned to shape a profitable, resilient, and nationally integrated organic future rooted in the region's deep agricultural legacy.

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Appendix B: Regional Handouts

CENTRAL PLAINS

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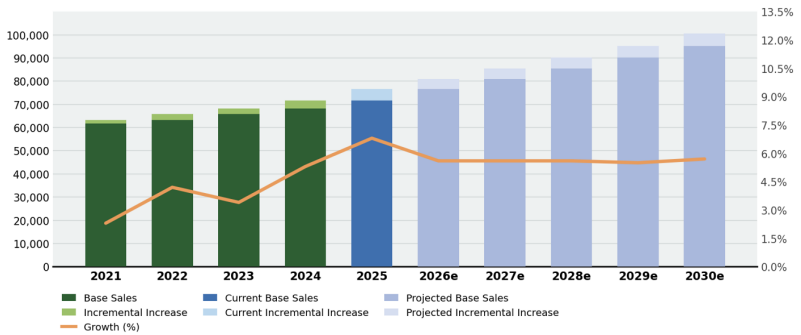
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Fast-Growing Organic Categories

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



The Plains Organic Advantage

A Practical Guide for Farmers & Producers

The Plains region — spanning **Colorado, Kansas, Nebraska, North Dakota, South Dakota, and Oklahoma** — sits at the core of the nation's organic grain and livestock system.

With nearly a million certified organic acres and deep expertise in feed-focused farming, this region supplies the building blocks that support organic dairies, poultry farms, ranches, and specialty crop markets nationwide. For producers, the Plains offer expansive land availability, strong market demand, and a growing set of opportunities to diversify, transition, and scale organic production.

A Region Built to Feed the Nation

Across the Plains, organic agriculture is grounded in large-scale acreage, climate-adapted cropping systems, and a long history of commodity production. Colorado leads the region in organic acreage, Nebraska's livestock sector ranks among the strongest in the country, and Kansas and South Dakota form the backbone of the U.S. organic grain belt. North Dakota brings unique strength in buckwheat, pulses, and export-oriented crops, while Oklahoma is an emerging force in organic pecans and expanding poultry and egg markets.

Producers across the region benefit from:

- **A vast and scalable land base**, with ~951,000 organic acres across six states
- **National importance in feed grains**, reducing dependence on imported organic corn, soy, and wheat
- **Strong organic household purchasing**, particularly in Colorado and Nebraska
- **Low population density**, enabling growth that many coastal regions cannot accommodate
- **Resilient cropping systems** suited to variable weather — including hay, wheat, soy, and buckwheat

These attributes make the Plains one of the country's most strategically important regions for organic expansion.

STATE	CERTIFIED OPERATIONS (2026)	CERTIFIED ACRES (2026)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Colorado	522	254,288	Eggs, cattle, hay	8th in nation for organic acres; 90% of households buy organic
Kansas	190	95,856	Wheat, corn, soybeans	79% of households buy organic
Nebraska	356	261,210	Chicken, corn, soybeans	4th nationally for organic animal sales (\$106M)
North Dakota	155	147,455	Wheat, buckwheat, hay	86% of households buy organic
Oklahoma	86	36,066	Pecans, eggs, wheat	72% of households buy organic
South Dakota	104	148,228	Corn, soybeans, hay	25% of farms plan expansion within 5 years

What the Region Produces — and Where It's Headed



Grains & Pulses: The Foundation of Organic Livestock Systems

Kansas, Nebraska, South Dakota, and North Dakota dominate organic corn, soy, wheat, and small grain acreage — forming the core of the national organic feed supply chain. Kansas and South Dakota alone contribute over 190,000 organic acres of grains and legumes, while Nebraska and North Dakota add strength in organic corn, soybeans, and buckwheat. Opportunities lie in transitioning more acres into rotational legumes such as lentils, chickpeas, and dry beans to improve soil health and regional protein self-sufficiency.

Livestock & Eggs: A High-Value Anchor for the Region

Nebraska ranks 4th nationally in organic livestock sales, generating more than \$106 million annually, while Colorado is a leader in organic beef and eggs backed by strong household demand. Expansion opportunities include increased pasture-based livestock systems in Kansas and South Dakota and growing poultry and egg production in Oklahoma and North Dakota.

Specialty & Regional Crops: Beyond Bulk Commodities

While known for high-acreage staples, the Plains also show rising potential in specialty markets. Oklahoma is a national leader in organic pecans, a high-value perennial crop with export and retail appeal. North Dakota maintains certified organic buckwheat production, and Colorado and Kansas are well positioned to expand organic vegetables, herbs, and forage systems for regional buyers and institutional markets.

Regional Challenges — and Producer-Led Solutions

Across the Plains, producers face similar constraints that define the next phase of regional opportunity:

- **Lack of regional processing and storage**, forcing grain and livestock products to leave the region before adding value
- **Long-haul transportation costs** tied to distance from major markets
- **Infrastructure gaps** for poultry, feed processing, grain cleaning, and value-added production
- **Limited support for transition, technical training, and rotational diversification**

Yet these barriers are also the clearest roadmap forward:

- **Onshore more processing** — from grain cleaning to livestock handling — to keep dollars circulating locally
- **Strengthen storage and logistics** networks that reduce dependence on coastal infrastructure
- **Expand transition support services**, particularly for grain-to-legume rotations and pasture-based livestock
- **Develop intra-regional markets** that shorten supply chains and increase producer margins
- **Build a recognizable regional identity**, such as “Grown in the Plains,” to drive consumer preference and institutional purchasing

Strategic investment in these areas will significantly increase farm profitability and regional resilience.

Looking Ahead: The Plains as a Strategic Anchor for Organic Agriculture

The Plains region is uniquely positioned to lead the next era of organic growth in the United States. With vast acreage, deep agricultural expertise, and the ability to rapidly scale feed and livestock systems, the region underpins the stability of organic supply nationwide. At the same time, rising interest in specialty crops, legumes, nuts, and diversified systems points to a future that is both more resilient and more profitable.

Whether expanding grain rotations, scaling poultry and dairy systems, planting high-value crops, or investing in regional processing, producers in the Plains are shaping a more self-sufficient and economically powerful organic future — one rooted in the strength, scale, and adaptability of the region itself.

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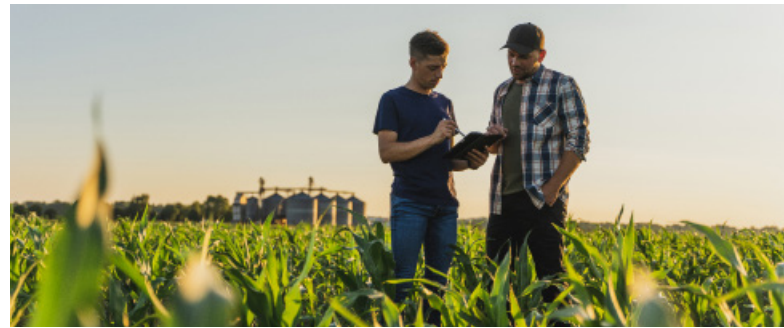
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**WEST/SOUTHWEST
TRANSITION TO ORGANIC
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Appendix B: Regional Handouts

SOUTHWEST



Advancing Regional Organic Markets

A FARMER'S TOOLKIT



WEST/SOUTHWEST TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

AUGUST 2026

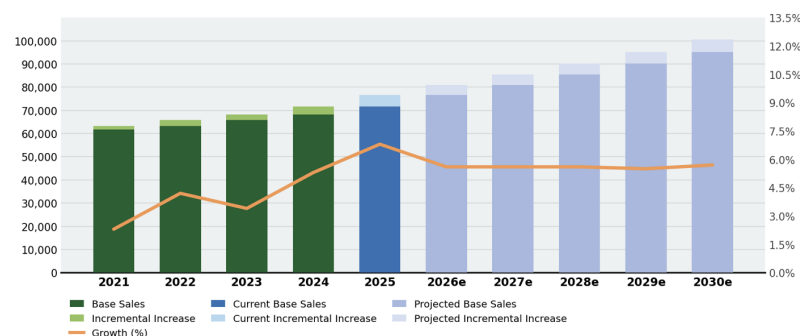
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The Southwest Organic Advantage

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The Southwest—anchored by **Texas and New Mexico**—has become one of the most strategically important organic regions in the country. Known for its powerhouse dairy sector, expanding organic cotton and grain systems, and deep expertise in arid-land agriculture, the region blends scale, innovation, and resilience. With more than **609,000 certified organic acres** and over **\$525 million** in annual organic sales, the Southwest demonstrates how producers can build profitable organic systems in some of the nation's most climate-challenged landscapes.

A Region Defined by Feed, Fiber & Climate-Smart Innovation

Organic production across Texas and New Mexico is shaped by vast rangelands, irrigated crop belts, and high-desert valleys that support dairy, beef, cotton, forage, and adaptive grain systems. Texas is a national leader in organic dairy and cotton, while New Mexico brings a strong foundation in forage, dryland cropping, and regenerative grazing.

Producers benefit from:

- **A powerful dairy and livestock corridor**, with Texas ranking #1 nationally in organic milk sales
- **A domestic organic fiber sector**, led by Texas's expanding cotton acreage and traceable regenerative cotton initiatives
- **Integrated grain–livestock systems**, reducing reliance on imported organic corn and soy
- **Arid-region innovation**, including dryland cropping, drought-resilient seed systems, and regenerative rangeland management
- **Growing infrastructure**, particularly along the Texas–New Mexico corridor from Hereford and Clovis to Las Cruces

Combined, these strengths position the Southwest as a national proving ground for organic growth in water-limited regions.

STATE	CERTIFIED OPERATIONS (2026)	CERTIFIED ACRES (2026)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Texas	1,071	568,678	Milk, cattle, cotton	92 % of U.S. households buy organic
New Mexico	102	40,721	Milk, cattle, corn	30 % of farms plan production expansion within 5 years

What the Region Produces — and Where It's Headed

Texas: A National Engine for Organic Dairy, Beef & Cotton

Texas continues to expand its leadership in organic milk, ranking first in the nation and supporting major processors through vertically integrated, pasture-based systems. The state also anchors the country's organic cotton sector, supported by regenerative partnerships and emerging textile traceability. Growing programs in feed grain production, livestock coordination, and risk-balanced hybrid (organic + conventional) operations offer opportunities to scale acreage and increase local feed autonomy.

New Mexico: Innovation & Integrity in Arid-Land Systems

New Mexico producers excel in dryland cropping, grass-fed livestock, and forage systems adapted to water-scarce environments. Organic dairies on the eastern and southern plains supply high-value milk to regional processors, while expanding acreage in organic corn, legumes, and forage supports both local feed security and soil-carbon improvement. Traditional acequia-based farming in northern New Mexico continues to strengthen culturally rooted small-farm systems and regional food sovereignty.

Regional Challenges — and Producer-Led Solutions

Expanding organic production in Texas and New Mexico requires addressing several interconnected challenges:

- **Water scarcity and drought**, demanding efficient irrigation, drought-resilient genetics, and dryland cropping strategies
- **Feed and processing gaps**, particularly for grain, cotton, dairy, and livestock operations
- **High transportation costs**, due to long distances between farms, processors, and markets
- **Limited infrastructure for specialty crops and value-added processing**

Farmers and partners across the region are advancing solutions:

- **Onshoring feed and fiber production**, reducing imports and strengthening local supply chains
- **Building processing and storage infrastructure**, including dairy, grain, cotton ginning, and forage facilities
- **Expanding regenerative grazing and rangeland management**, improving water retention, soil health, and resilience
- **Developing regional brands**, highlighting the integrity and climate-smart innovation of Texas and New Mexico organic systems

Supporting hybrid operations, enabling producers to balance transition risk and manage acreage flexibility. These strategies help convert regional constraints into systems-level advantages.

Looking Ahead: A National Leader in Climate-Smart Organic Agriculture

As U.S. organic sales surpass **\$76.6 billion**, the Southwest is poised to expand its leadership—particularly in dairy, beef, cotton, and arid-region cropping systems. Texas and New Mexico are uniquely positioned to strengthen national feed and fiber independence, scale dryland innovation, and model regenerative approaches in water-limited environments.

Going forward, the region is expected to:

- Lead the country in organic animal-based systems
- Advance domestic organic cotton and fiber sovereignty
- Expand drought-resilient grains and forage systems
- Anchor climate adaptation research and regenerative rangeland initiatives
- Scale acreage to meet rising demand in both commodity and specialty markets

Whether producing organic milk and beef, growing cotton for sustainable textile markets, or developing drought-adapted grains and forage, Southwest producers are shaping a resilient, resource-smart, and economically powerful future for organic agriculture.

WORKING EFFECTIVELY WITH BUYERS

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Come in with your eyes wide open."*

— Kenny, Natural Foods Retail Buyer

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What Do Buyers Want?

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

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- Packaging, labeling, and certification requirements
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Reach Out Directly

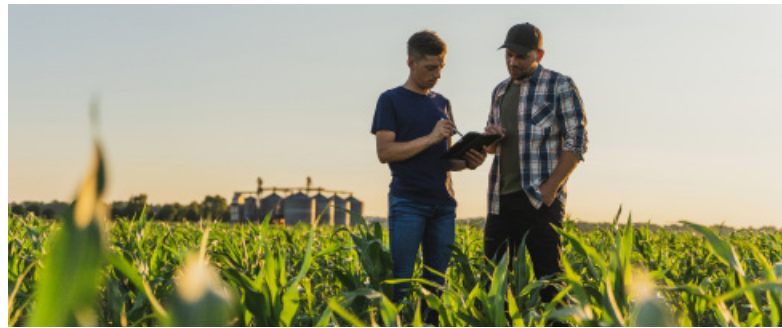
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Food hubs and regional aggregators often buy from small and mid-sized farms and already have strong relationships with retailers and institutions.

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Grocery Buyers

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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.



WEST/SOUTHWEST TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

Appendix B: Regional Handouts

WEST



Advancing Regional Organic Markets

A FARMER'S TOOLKIT



WEST/SOUTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

AUGUST 2026

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.

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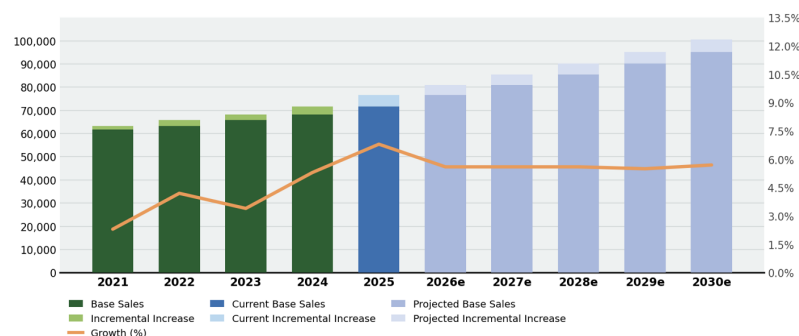
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Organic Market Snapshot

- \$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.



WEST/SOUTHWEST TRANSITION TO ORGANIC PARTNERSHIP PROGRAM

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 West Organic Advantage

A Practical Guide for Farmers & Producers

The West anchors the U.S. organic economy — driven by **California's** unmatched scale and strengthened by the climate diversity and adaptive innovation of **Arizona, Nevada, Utah, and Hawaii**. Together, these states represent the largest and most influential organic region in the country, producing more than a quarter of national organic acreage and over half of all organic sales. From orchard crops and leafy greens to desert-grown grains and regenerative livestock systems, the West demonstrates how scale, climate adaptation, and innovation can work in tandem to define the future of organic agriculture.

A Region Defined by Scale, Diversity & Climate Innovation

Organic agriculture in the West benefits from vast acreage, unparalleled crop diversity, and a robust infrastructure ecosystem that connects farms to both domestic and global markets. California remains the cornerstone — with **1.84 million organic acres** and over **\$14 billion** in annual organic sales — while Arizona, Nevada, and Utah contribute nearly **600,000 additional acres** across forage, grains, and winter vegetables. Hawaii brings a unique tropical dimension rooted in regenerative practices and culturally significant crops.

Producers across the region benefit from:

- **Exceptional climate range**, enabling year-round production across coastal, alpine, and desert environments
- **Diverse production systems**, from fruit and vegetable powerhouses to expanding dairy, grain, and forage sectors
- **Strong infrastructure**, including cold-chain networks, processing hubs, export facilities, and climate-resilient irrigation technologies
- **Leadership in regenerative agriculture**, water conservation, and circular nutrient systems
- **A global and national market presence**, supplying 70% of the nation's organic fruits and vegetables

These strengths make the West a critical engine for both organic supply and the future of climate-adapted production.

STATE	CERTIFIED OPERATIONS (2026)	CERTIFIED ACRES (2026)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Arizona	313	37,482	Lettuce, broccoli, celery	Key U.S. winter produce hub; organic farms hire 7x more workers than conventional
California	5,465	1,840,000	Avocados, citrus, rice, wine grapes	Ranks 1st in the nation in certified operations; serves the largest U.S. organic retail market
Hawaii	104	100,185	Lettuce, macadamias, coffee	Over 100,000 certified organic acres; export crops and food security focus
Nevada	125	411,523	Hay, eggs, barley	5th in U.S. for organic acres; expanding feed and rangeland systems
Utah	196	137,922	Eggs, wheat, milk	55% split operations; growing organic grain and dairy clusters

What the Region Produces — and Where It's Headed

California: The Epicenter of Organic Fruits, Vegetables & Dairy

California dominates U.S. organic specialty crop production — including berries, citrus, leafy greens, nuts, and orchard crops — while supporting major dairy, poultry, and vegetable systems. Its mature infrastructure, favorable climate, and diversified enterprises enable seamless supply to both domestic and export markets.

Arizona & Nevada: Desert Innovation Meets Forage Expansion

These states are redefining organic agriculture in arid landscapes through water-efficient irrigation, regenerative grain rotations, and expanding organic hay and forage systems. Arizona's winter vegetables fill national supply gaps, while Nevada's vast rangelands offer large-scale potential for organic livestock feed.

Utah: Growing Dairy, Grain & Regenerative Systems

Utah's organic sector blends grain, dairy, and mixed livestock systems with climate-smart innovation. High-mountain environments support rotational diversity, while producers increasingly adopt regenerative practices to build soil resilience and feed self-sufficiency.

Regional Challenges — and Producer-Led Solutions

While the West is the nation's most influential organic region, it also faces some of its most complex challenges:

- **Water scarcity and drought pressure**, requiring innovative irrigation and groundwater management
- **Labor shortages**, especially in high-value specialty crop sectors
- **Processing and feed gaps**, particularly for dairy, livestock, and forage systems outside of California
- **Land and operational costs**, which challenge producer profitability and expansion

Producers and regional partners are leading solutions that include:

- **Investing in local processing and composting infrastructure**, reducing dependence on out-of-region facilities
- **Scaling feed and forage production** in Arizona, Nevada, and Utah to strengthen livestock systems
- **Advancing water-efficient practices**, including drip irrigation, deficit irrigation, and drought-adapted crop rotations
- **Adopting regenerative systems** that improve soil health and reduce input dependence
- **Expanding cold-chain capacity** to support diversified fruit and vegetable distribution

These strategies reinforce resilience, competitiveness, and long-term regional sustainability.

Looking Ahead: The West as the Epicenter of U.S. Organic Growth

With national organic sales surpassing **\$76.6 billion**, the West remains central to future expansion — combining unmatched production volume with leadership in climate adaptation. California's scale, paired with the emerging feed and forage capacity of Arizona, Nevada, and Utah, ensures the region's ongoing relevance to national food security. Hawai'i adds unique value through tropical systems, Indigenous agricultural knowledge, and export opportunities.

Across the region, producers are shaping the next generation of organic supply by:

- Leading climate-adapted fruit, vegetable, dairy, and livestock systems
- Expanding feed and rotational grain production for regional self-sufficiency
- Driving national composting, soil health, and regenerative research
- Strengthening both regional and global organic market resilience

Whether producing specialty crops for export, scaling desert grains, or advancing regenerative dairy systems, West-region farmers are at the forefront of building a resilient, climate-smart, and economically powerful organic future.

WORKING EFFECTIVELY WITH BUYERS

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Appendix B: Regional Handouts

NORTHWEST

Advancing Regional Organic Markets

A FARMER'S TOOLKIT



NORTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

AUGUST 2026

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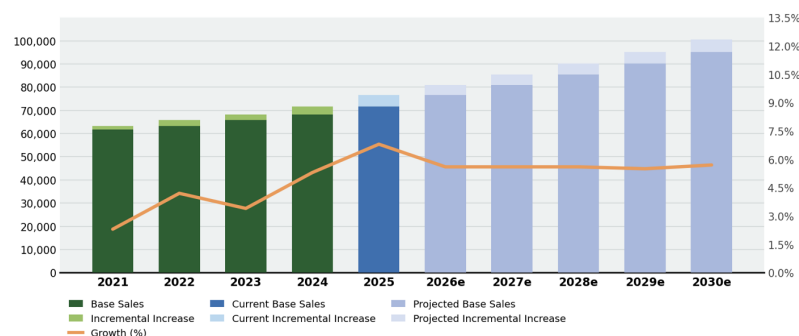
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The Northwest Organic Advantage

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The Northwest stands at the heart of U.S. organic agriculture — a region defined by large acreage, strong consumer demand, diverse climates, and a deep-rooted culture of ecological farming. Together, **Washington, Oregon, Montana, Idaho, and Alaska** form a powerful organic cluster that produces everything from apples and blueberries to grains, pulses, hay, dairy, beef, and greenhouse-grown vegetables. For producers, this region offers both stability and opportunity: established markets, room for expansion, and a growing regional identity that values integrity, resilience, and innovation.

A Region Built for Organic Growth

Organic agriculture thrives in the Northwest thanks to a rare blend of scale and specialization. Washington and Oregon anchor the region with high-value fruit, vegetable, dairy, and specialty crop sectors, while Montana and Idaho contribute over 800,000 combined certified acres of grains, pulses, hay, and livestock systems — one of the largest organic land bases in the country. Alaska, though smaller in size, is quickly expanding through greenhouse production, direct marketing channels, and strong household demand for local foods.

Across these states, producers benefit from:

- **Robust consumer demand**, with organic purchasing exceeding 85–90% in states like Washington, Oregon, and Idaho
- **A strong acreage foundation**, including 1.3+ million combined organic acres in Montana, Oregon, and Idaho
- **Cross-climate resilience**, from coastal fruit valleys to interior dryland grain regions
- **Growing infrastructure**, including processing, storage, feed, and value-added facilities

For farms looking to transition, diversify, or scale, the Northwest offers one of the most supportive environments in the country.

STATE	CERTIFIED OPERATIONS (2026)	CERTIFIED ACRES (2026)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Alaska	14	504	Vegetables, tomatoes, herbs	Focused on cold-hardy crops compatible with short season
Idaho	352	381,575	Milk, hay, barley	6th nationally in certified acres; 88% of households buy organic
Montana	305	462,290	Eggs, wheat, cattle	4th nationally in certified acres; 85% of households buy organic
Oregon	836	308,025	Milk, blueberries, hay	47% of counties are “organic hotspots”; strong diversified markets
Washington	1,223	109,802	Apples, eggs, chickens	5th nationally in number of operations; 92% of households buy organic
Wyoming	79	141,152	Wheat, hay, millet	90% of households buy organic

What the Region Produces — and Where It's Headed



Tree Fruit & Berries: The Northwest's Signature Sector

Washington and Oregon dominate U.S. production of organic apples, pears, cherries, and blueberries — with Washington's apple acreage alone representing nearly 90% of the national total. Opportunities remain strong in mixed-fruit orchards, integrated pest management systems, and expansion of cold storage, packing, and processing capacity.

Grains, Pulses & Dairy The Engine of the Interior Northwest

Montana, Idaho, and eastern Washington form a high-value grain corridor producing organic wheat, barley, lentils, potatoes, and hay for national and export markets. Idaho and Oregon's organic dairy sectors continue to grow, supported by feed availability and emerging bottling and co-op marketing opportunities. Producers can benefit from expanding rotational systems to improve soil health and strengthen grain-to-feed supply chains.

Vegetables, Livestock & Emerging Markets

Washington and Oregon supply regional and national markets with high-value vegetables such as carrots, tomatoes, and leafy greens. Montana and Idaho's pasture-based beef, poultry, and egg systems are expanding as consumer demand for traceable, regionally grown proteins accelerates. Alaska is rapidly growing organic greenhouse vegetables and direct-to-community markets, improving local food security and season extension.

Regional Challenges — and Producer-Led Solutions

While the region has strong momentum, farmers across the Northwest recognize a common set of constraints:

- **Midstream bottlenecks** in storage, packing, processing, and distribution
- **Limited land access** for new and transitioning producers
- **Water scarcity and climate variability** affecting yields and crop choices
- **Gaps in technical assistance**, particularly in livestock, transition planning, and regenerative systems.

Yet these barriers also point directly to the next chapter of opportunity:

- **Invest in shared infrastructure** — grain cleaning, cold storage, feed mills, and co-packing — to keep more value in the region
- **Strengthen rotational and regenerative practices** that improve drought resilience and soil health
- **Support transition programs** that reduce risk during the three-year organic conversion period
- **Build a stronger "Northwest Organic" identity** to boost visibility and market access for regional products

For many producers, addressing these bottlenecks unlocks the ability to scale sustainably and profitably.

Looking Ahead: A Strong Future for Northwest Organic Agriculture

The Northwest is poised to lead the next generation of organic production in the U.S. — grounded in climate-smart practices, technical innovation, and the unmatched diversity of its farming systems. With national leaders in acreage and sales, a robust consumer base, and growing interest in transition and value-added processing, the region offers farmers a stable foundation and a wide-open frontier of opportunity.

Whether building out orchards, scaling grain rotations, transitioning livestock systems, or strengthening regional supply chains, producers across the Northwest are shaping an organic future rooted in resilience, regional pride, and shared growth.

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