



ADVANCING REGIONAL ORGANIC MARKETS

# NATIONAL FARMERS TOOLKIT

NOVEMBER | 2025

**Wolf & Associates**  
THE ORGANIC SPECIALISTS



**NATIONAL**  
TRANSITION TO ORGANIC  
PARTNERSHIP PROGRAM





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## TOOLKIT PART 1

# THE NATIONAL LANDSCAPE







## Today's Buyer Demand For Organic In The U.S.

### UNDERSTANDING THE **NATIONAL** AND **REGIONAL** LANDSCAPE

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Organic demand in the U.S. is growing — faster than the broader marketplace — and reshaping supply chains.

To build successful regional programs, it's critical to understand:

- Where organic sales are growing fastest
- What's driving shopper choices
- How each region fits into the national opportunity

THIS SECTION PROVIDES  
KEY FACTS, TRENDS,  
AND INSIGHTS TO SUPPORT  
ORGANIC MARKET DEVELOPMENT



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WHAT CONNECTS THE FIELD AND THE FORK

LOOKING AT WHAT WE GROW AND WHAT WE BUY



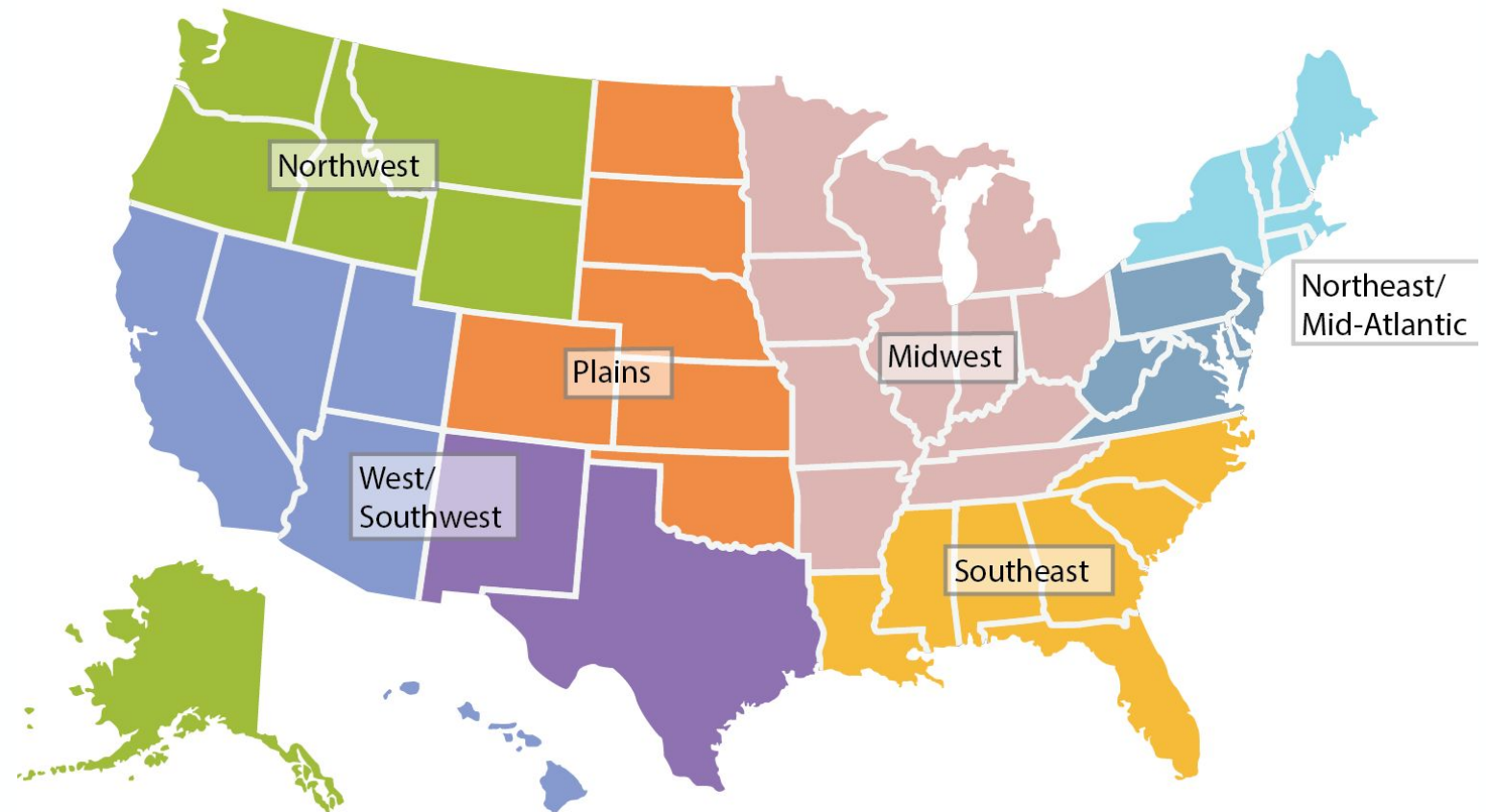
## MARKET DEMAND

### Today's Buyer Demand For Organic In The U.S.

**Note:**

While the toolkit will generally follow the TOPP regions, some regional analyses will be split to allow for focused guidance.

## TOPP Regions





AGRICULTURAL  
GROWTH

Organic Market  
Snapshot

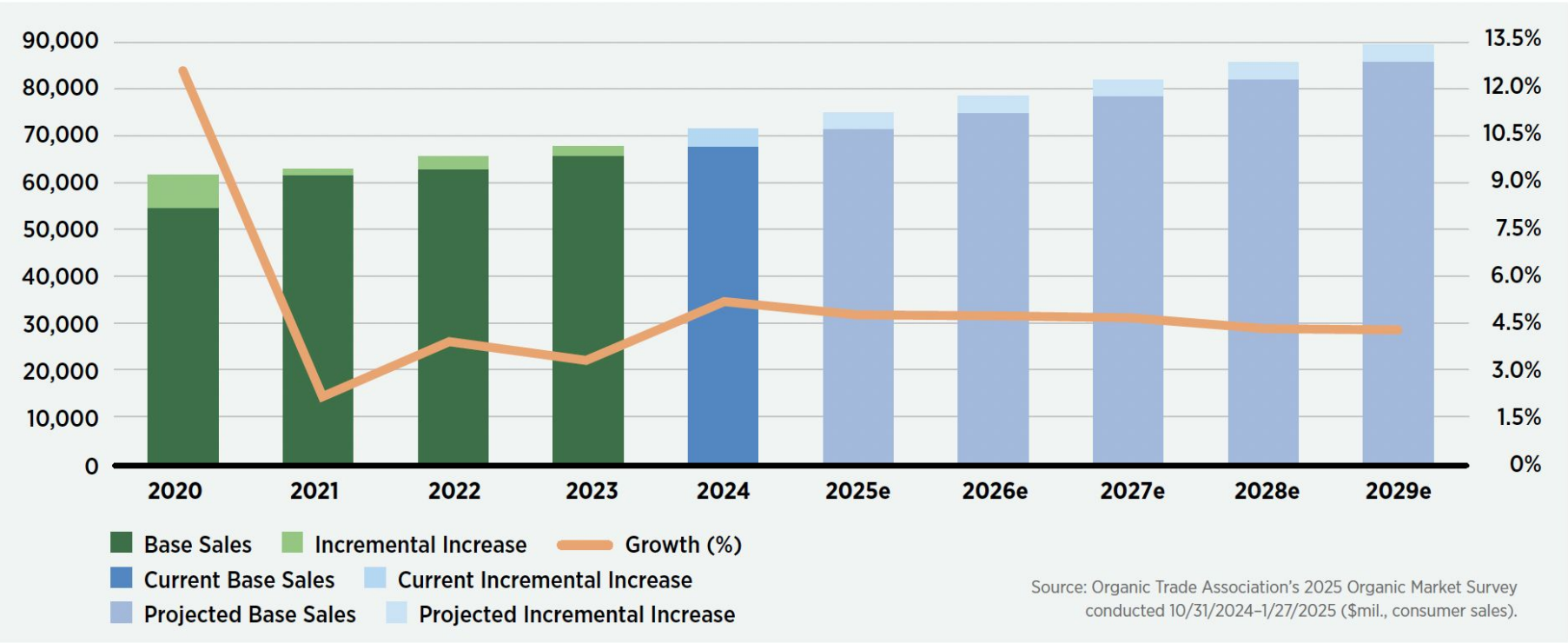
\$71.6 Billion In  
US Sales (2024)

5.2% Growth  
Year-Over-Year

Organic Outpacing  
Total Food Market  
(2× Growth Rate)

**Forecast:** Organic Sales  
Expected To Exceed \$85  
Billion By 2029

FIGURE 1.2. Total U.S. Organic Sales and Growth, 2020–2029e



Consumer data from Organic Trade Association's [2025 Organic Market Report](#)

WHAT ORGANIC  
CONSUMERS BUY

Leading Organic  
Categories By  
Retail Sales

CATEGORY	2024 SALES (\$B)	% OF TOTAL ORGANIC MARKET
Produce	\$21.5B	30.1%
Grocery Items <i>(packaged grocery products)</i>	\$15.0B	21.0%
Beverages <i>(alcoholic &amp; non-alcoholic)</i>	\$9.5B	13.3%
Dairy and Eggs	\$8.5B	11.9%
Meat, Poultry, Seafood	\$3.9B	5.6%



WHAT CONSUMERS  
BUY

Fastest Growing  
Segments

**Key Takeaway:**  
Organic growth is expanding beyond produce.

For U.S. growers, this means real opportunities to **diversify, add value, and build more resilient, higher-margin farm systems** — especially in feed grains, and value-added production.

SEGMENT	GROWTH	KEY TRENDS	IMPLICATIONS FOR GROWERS
Meat, Poultry, Seafood	16.10%	Organic beef up +36.7%	<b>High-opportunity segment for U.S. livestock producers.</b> 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	7.70%	Organic eggs up +16.1%	<b>Strong upside for diversified farms.</b> Requires certified feed supply — a call to expand U.S. organic grain production.
Textiles (fibers, apparel)	7.40%	Lifestyle and sustainability-driven	<b>Opportunity for fiber crop growers.</b> Cotton and hemp may see expanded demand <b>if currently limited domestic supply chains and processing capacity can be rebuilt.</b>
Beverages	5.20%	Functional drinks, clean labels	<b>Growth in value-added processing.</b> Organic fruit and botanical growers can tap into beverage markets with the right processing partners.



## What's Driving Growth? Factors Fueling Organic Demand

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### **Clean Ingredients:**

Shoppers seeking simpler, recognizable foods.

### **Shrinking Price Gap:**

Narrower difference from conventional.

### **Health Trends:**

Influence of GLP-1 (weight-loss) drugs leading to cleaner eating habits.

### **Generational Shift:**

Millennials and Gen Z driving sustainability, local, and global flavors



WHAT  
FARMERS GROW

U.S. Organic  
Production by  
Value  
(2021–2023)

**Key Takeaway:**  
While organic produce and dairy lead in domestic production value, grains, proteins, and fibers remain underdeveloped — signaling opportunities to diversify and reduce import reliance.

CATEGORY	ESTIMATED FARMGATE VALUE	TOP CROPS OR COMMODITIES	NOTES
Produce (Fruits & Vegetables)	~\$4.11B (2021)	Lettuce, carrots, apples, berries, tomatoes	Largest by acreage and diversity; strong export and local market presence
Dairy	~\$2.0B (2021)	Milk, cheese, yogurt	Second largest sector; dependent on domestic organic feed supply
Grains and Oilseeds	~\$750M (2021)	Corn, soybeans, oats	Most heavily import-competed category; opportunity for expansion
Poultry & Eggs	~\$800M (2021)	Eggs, broilers, layers	Growth tied to consumer demand and feed supply constraints
Livestock (Beef, Pork, Other)	~\$500M (2021)	Beef, pork, sheep, goats	Niche but fast-growing; pasture access and feed availability key
Maple and Specialty Syrups	~\$150M (2021–2023)	Maple syrup (Northeast focus)	Specialty crop with high domestic identity and growth potential
Cotton	~\$15.7M (2023)	Cotton	Very limited production; 99% of U.S. consumption is imported

## WHAT WE BUY vs. WHAT WE GROW

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### Opportunities to Onshore Organic Imports

The U.S. relies heavily on imported organic foods. USDA ERS reports \$5.7B in organic imports in 2024, while the latest USDA Certified Organic Survey shows \$11.2B in domestic farm-gate sales (2021). Strong production exists in dairy, fruits, vegetables, and grains - but not in many of the items Americans buy most.

**Produce:** We estimate that the U.S. imported at least \$2.5 billion in organic fruits and vegetables in 2024. Produce is consistently the largest category of organic imports by value, accounting for an estimated 35–45% of total organic import spending.

**Berries:** The U.S. imported an estimated \$300–350M in organic blueberries in 2024.

**Fresh Tomatoes:** Organic tomato imports totaled \$223M in 2023.

**Feed Grains:** U.S. organic corn (\$424M) + soybeans (\$242M) farm-gate sales totalled \$666M (2021), but imports of organic feed grains have surged, tripling to quadrupling in recent years.

**Cotton:** U.S. organic cotton production was 56,717 bales (2024) yielding \$18M farm-gate value; nearly all organic cotton textiles are imported.

The U.S. organic market is strong — but structurally import-dependent in key categories. The biggest onshoring opportunities lie in produce (berries, tomatoes, herbs) and feed-grain rebuilding, where domestic supply can realistically close the gap with demand.





## Bridging the Gap Between Imports and Domestic Production

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As U.S. demand for organic products continues to rise, imports are filling substantial gaps in supply. Strategic investment in domestic production can reduce reliance on imports, enhance supply chain resilience, and support local economies.

### **Key Takeaway:**

By investing in domestic production capabilities, the U.S. can reduce its reliance on imports, ensure organic integrity, and create economic opportunities for local farmers and producers.

# WHAT THE NATIONAL ORGANIC LANDSCAPE MEANS FOR YOU





# The U.S. Organic Market Isn't Just Growing — **IT'S EVOLVING**

Demand is strong and diversifying: not just fruits and vegetables, but also **grains, livestock, fiber crops**, and value-added goods. This creates real opportunity for producers ready to adapt, innovate, and meet emerging needs.

Whether you're farming 5 acres or 5,000, there's a role to play in shaping a more resilient, regionally rooted organic supply chain.

## **\$71.6 billion in organic sales (2024)**

Organic sales are growing twice as fast as the overall food market.

## **New demand in grains, protein, and fiber**

These underdeveloped segments offer room for U.S. farmers to lead.

## **Import replacement is a real opportunity**

Organic grains, beans, and animal feed are still heavily imported — and needed domestically.

## **Your region matters**

Every farm, in every region, helps close the gap between what U.S. shoppers buy and what U.S. farmers grow

## WHAT'S NEXT

# Your Region, Your Opportunity

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Now that we've explored the national landscape, let's take a closer look at what's happening closer to home.

We'll dive into the trends, crops, challenges, and opportunities shaping organic **agriculture in your region** — and how you can take advantage of the growing demand for regional, resilient supply.





# References

## **Farm Progress** Shelley Huguley

*“U.S. Organic Imports Triple, Exports Rise.”*

Farm Progress, March 2025.

<https://www.farmprogress.com/crops/u-s-organic-imports-triple-exports-rise>

## **USDA NASS** 2021 Organic Survey Highlights

U.S. organic sales reached \$11.2 billion across 8.1 million acres.

[https://www.nass.usda.gov/Publications/Highlights/2022/2022\\_Organic\\_Highlights.pdf](https://www.nass.usda.gov/Publications/Highlights/2022/2022_Organic_Highlights.pdf)

## **Organic Produce Network** State of Organic Produce 2024

<https://www.organicproducenetwork.com/organic-retail/state-of-organic-produce-2024>

## **Organic Trade Association** 2024 Organic Industry Survey Highlights

U.S. organic sales reached \$71.6 billion in 2024, with growth projected to exceed \$85 billion by 2029.

<https://ota.com/news/press-releases/22573>

## **Organic Trade Association (OTA)**

*State Organic Profiles (2023–2024)*

<https://ota.com/download-details-about-organic-your-state>

## **USDA ERS** Organic Agriculture Topic Page

National statistics and trends in certified organic production.

<https://www.ers.usda.gov/topics/natural-resources-environment/organic-agriculture/>

## **USDA ERS** Organic Agriculture: By the Numbers

This page now hosts the content from the 2025 Organic Situation Report (EIB-281).

<https://www.ers.usda.gov/publications/pub-details?pubid=110883>

## **USDA AMS** National Organic Program Handbook

Full regulatory framework for certified organic operations.

<https://www.ams.usda.gov/rules-regulations/organic/handbook>

## **Organic Trade Association** Organic Hotspots Report

Counties with clusters of organic activity linked to higher incomes and lower poverty.

<https://ota.com/hotspots>

## **Penn State University & The Organic Center**

*Economic Impact of Organic Agriculture Hotspots*

[https://www.researchgate.net/publication/323151836\\_Economic\\_impact\\_of\\_organic\\_agriculture\\_hotspots\\_in\\_the\\_United\\_States](https://www.researchgate.net/publication/323151836_Economic_impact_of_organic_agriculture_hotspots_in_the_United_States)

## **Textile Exchange** Organic Cotton Market Report 2022

Provides global fiber volume, acreage, and brand demand data.

<https://textileexchange.org/reports/organic-cotton-market-report/>

## **USDA GATS** Global Agricultural Trade System

Import/export data for organic commodities.

<https://apps.fas.usda.gov/gats/>

**Wolf & Associates** Internal analysis and synthesis of U.S. organic supply-demand gaps, regional production opportunities, and import replacement strategies (2023–2024).



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THANK YOU

## DISCUSSION

