A FARMER'S TOOLKIT | REGIONAL MODULE

MID-ATLANTIC

NOVEMBER | 2025

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TOOLKIT PART 2

MID-ATLANTIC REGIONAL SNAPSHOT

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Key Facts and Strategic Importance

ORGANIC MARKET STRENGTHS IN THE MID-ATLANTIC

Organic agriculture is gaining momentum across the Mid-Atlantic, with deep-rooted farming traditions, strong per-capita organic demand, and standout leadership in production and sales. While growth varies across the region, Pennsylvania, Maryland, and Virginia anchor a maturing and resilient organic economy with meaningful opportunities to scale across the full value chain.

- The Mid-Atlantic combines **over 750,000 certified organic acres** across six states, with Pennsylvania and Maryland ranking among the top ten nationally in both acreage and sales.
- The region's **dense consumer markets**—from Philadelphia and Baltimore to Washington, D.C.—drive steady demand and price premiums for local and organic goods.
- Robust **institutional and research infrastructure**, including Rodale Institute, University of Maryland, and Virginia Tech, provide strong technical support and innovation pipelines for organic producers.

Organic Market Strengths in the Mid-Atlantic

KEY FACTS:

- **Total Certified Organic Acreage:**
  ~750,000 acres across six states
- **Annual Combined Organic Sales:**
  Over $1.4 billion
- **Certified Organic Operations:**
  ~5,700 organic farms and businesses
- **Top Organic Commodities:**
  Dairy, poultry, eggs, mushrooms, vegetables, and grains
- **Regional Reach:**
  Supplies major East Coast markets including New York, Philadelphia, Baltimore, and Washington, D.C.

STRATEGIC IMPORTANCE

The Mid-Atlantic is one of the most strategically positioned organic regions in the U.S.—close to dense population centers and home to robust production systems. It is:

- A **hub for organic poultry, eggs, and dairy**, with Pennsylvania leading nationally in animal product sales.
- A **feed and grain corridor** supporting livestock systems throughout the Eastern U.S.
- A **market proximity powerhouse**, with 60+ million consumers within a day's drive.
- A **center for research and innovation**, driven by public–private collaboration and state-level organic programs.

THE MID-ATLANTIC BY STATE

Regional Overview - Chart by State

STATE	CERTIFIED OPERATIONS (2025)	CERTIFIED ACRES (2025)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Delaware	70	3,971	Corn, chicken, vegetables	75% of households buy organic
Maryland	200	16,203	Chickens, milk, soybeans	85% of households buy organic
New Jersey	672	3,715	Mushrooms, tomatoes, blueberries	47% of farms plan expansion; 82% of households buy organic
Pennsylvania	1,628	116,451	Chickens, eggs, mushrooms	3rd in nation for organic operations; $20 M in OREI/ORG funding
Virginia	307	21,658	Chickens, tobacco, milk	Organic farms hire 150% more workers than conventional
West Virginia	63	35,793	Chickens, eggs, milk	75% of households buy organic

Regional Overview – Analysis

SIX STATES, ONE CONNECTED CORRIDOR FOR ORGANIC GROWTH

The Mid-Atlantic's blend of mature agricultural infrastructure, consumer proximity, and diversified production make it a national model for integrated organic supply chains. From Pennsylvania's scale to New Jersey's specialty produce and Virginia's transitioning acreage, each state contributes unique assets to a balanced and resilient regional system.

Key Takeaway:
The Mid-Atlantic's strength lies in its diversity and proximity—connecting high-value specialty production with robust animal systems and a vast nearby consumer base.

Pennsylvania
National leader in organic animal products, dairy, and mushrooms; long-standing center of organic research and innovation.

Maryland
Strong organic grain and vegetable sector; robust cost-share and certification programs support steady growth.

Virginia
Expanding organic livestock and forage production; growing interest in organic conversion on former tobacco and row-crop land.

Delaware
Compact but strategically located for feed grain and poultry systems; ideal for connecting grain and livestock supply chains.

New Jersey
High-value produce, herbs, and direct-market systems; strong institutional and consumer demand for local organic.

West Virginia
Smaller acreage but strong momentum in diversified farms and forest-based organics; expanding poultry and vegetable sectors.

HIGH OPPORTUNITY CROPS

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HIGH OPPORTUNITY CROPS

Poultry, Eggs & Livestock

Organic poultry and egg systems dominate regional farmgate sales and are central to regional feed and infrastructure strategies.

SECTOR	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Broilers & Eggs	Very High	Strong in PA, VA, WV, DE	PA leads the nation in organic poultry sales	Expansion of organic feed production and processing capacity strengthens system integrity.
Dairy	High	Strong in PA, growing in MD & VA	Transition to grass-based and regenerative systems	Sustains rural economies and aligns with consumer preference for local and pasture-based products.
Beef & Forage	Moderate	Expanding in VA and WV	Integration with rotational grazing systems	Supports diversified farm income and carbon-positive land use.

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HIGH OPPORTUNITY CROPS

Specialty and Protected Agriculture Crops

The Mid-Atlantic's temperate climate and market proximity create prime conditions for expanding organic specialty crops and protected agriculture systems.

CROP	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Mushrooms	Very High	Concentrated in PA	Expanding demand for organic mushrooms nationally; PA supplies 60% of U.S. production	Low land use, high value, and strong retail growth make mushrooms a cornerstone of regional supply.
Leafy Greens (lettuce, spinach, kale)	High	Moderate; limited winter supply	Year-round greenhouse production emerging in NJ and MD	Consumer demand for fresh, local greens; protected ag reduces import reliance.
Berries (blueberries, raspberries)	High	Seasonal	Strong base in NJ; opportunity in MD and VA	Short regional seasons create premium potential and processing opportunities.

HIGH OPPORTUNITY CROPS

Grains & Feed Systems

Organic feed self-sufficiency is a critical opportunity for the region's livestock and poultry sectors.

CROP	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Feed Grains (corn, soy)	Very High	Insufficient regional production	MD and DE are key feed hubs	Scaling organic feed reduces fraud risk and improves livestock profitability.
Small Grains (oats, barley, wheat)	Rising	Emerging markets	Rotation crops for dairy and poultry systems	Adds diversity, soil health benefits, and risk mitigation.
Transition Crops (former tobacco systems)	Niche	VA focus area	Transition acreage potential	Builds soil carbon and opens entry for new organic farmers.

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High Opportunity Crops – Analysis

High Opportunity Crops – Strategic Takeaways

- The Mid-Atlantic's diverse climate allows both **high-value specialty crops** and **grains** to thrive within short distances.
- **Mushrooms, poultry, and dairy** anchor a mature organic economy with strong infrastructure and markets.
- Expanding **feed self-sufficiency** and **protected agriculture** are top priorities to meet growing demand and reduce import dependence.
- With **dense urban markets** nearby, scaling regional production can immediately connect to buyers and reduce distribution emissions.

REGIONAL ONSHORING OPPORTUNITIES

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REGIONAL ONSHORING OPPORTUNITIES

Building Regional Value Retaining Organic Production and Processing in the Mid-Atlantic

Key Takeaways:
Reinvesting in local processing and feed infrastructure keeps organic value in-region and enhances economic resilience.

CATEGORY	COMMON IMPORTS / EXTERNAL SOURCING	U.S. IMPORT VALUE (EST.)	REGIONAL OPPORTUNITY	MID-ATLANTIC ADVANTAGE
Organic Feed Grains	Soybeans, corn, mixed feed	$300M+	Scale organic grain production in MD, DE, and PA	Existing poultry demand and infrastructure; close integration with livestock.
Poultry & Eggs	Finished products from outside region	$200M+	Expand local processing and labeling	Strong animal output in PA, VA, and WV; need mid-scale processing capacity.
Vegetables and Specialty Crops	Tomatoes, berries, greens	$500M+	Extend season through protected ag	Dense consumer markets and climate-fit crops.
Dairy Processing	Milk bottled out-of-region	N/A	Develop mid-size creameries and co-pack facilities	Robust dairy base and local brand recognition.
Institutional Procurement	Produce and shelf-stable goods	N/A	Leverage food hubs and co-op distribution	Schools, hospitals, and universities drive stable demand.

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REGIONAL GENERAL OPPORTUNITIES

Growing Regional Organic Supply: KEY TARGETS

OPPORTUNITY AREA	WHY IT MATTERS
Organic Feed Grains	Foundation of poultry, dairy, and egg systems; reduces reliance on imported feed.
Poultry & Eggs	Strong consumer and institutional demand; opportunity for mid-scale processing.
Mushrooms & Specialty Crops	High value per acre; year-round production supports economic diversity.
Protected Agriculture (CEA, greenhouses)	Extends growing seasons; supports local winter supply.
Transition Land (former tobacco and row-crop systems)	Pathway for new organic acreage and diversified farm income.
Dairy & Grass-Based Livestock	Core to rural economies; aligns with regenerative practices.
Institutional & Urban Markets	Large, stable markets close to production centers; opportunity for regional branding.

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BARRIERS & SOLUTIONS

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BARRIERS & SOLUTIONS

Challenges to Expanding Mid-Atlantic Organic Supply

Key Takeaways:
The Mid-Atlantic's growth depends on bridging infrastructure, feed, and labor gaps—unlocking scale through coordination and technical support.

BARRIER	SOLUTION
Limited organic grain and feed processing	Develop integrated grain–feed–livestock programs and shared-use processing hubs
High cost of transition and certification	Expand cost-share, mentorship, and technical assistance through TOPP and state programs
Feed supply-demand imbalance	Coordinate regional feed systems across MD, DE, and PA to reduce import dependence
Market concentration in poultry systems	Support independent processors and grower cooperatives to strengthen local value capture
Labor and technical skill shortages	Invest in training, apprenticeships, and farmworker support
Weather and climate variability	Promote soil health, perennial systems, and adaptive grazing to enhance resilience
Infrastructure gaps for small-scale producers	Build mid-tier processing, storage, and aggregation hubs to connect farms to local markets

The Mid-Atlantic: A Region Ready for the Next Chapter of Organic

With national leadership in mushrooms, poultry, and dairy—and growing investment in feed, produce, and specialty crops—the Mid-Atlantic is poised to expand its role in U.S. organic agriculture.
Its **dense consumer base**, **fertile farmland**, and **established institutions** make it ideal for scaling sustainable, locally rooted organic supply chains.

- **Production Strength:** Deep expertise in livestock, dairy, and diversified cropping systems.
- **Market Demand:** 60+ million consumers within 300 miles.
- **Transition Potential:** Thousands of acres of conventional and tobacco land ready for conversion.
- **Innovation & Support:** Nationally recognized research and extension programs.

Key Takeaways:
The Mid-Atlantic's organic future is built on collaboration—connecting producers, processors, and buyers to deliver integrity, resilience, and value across the region.

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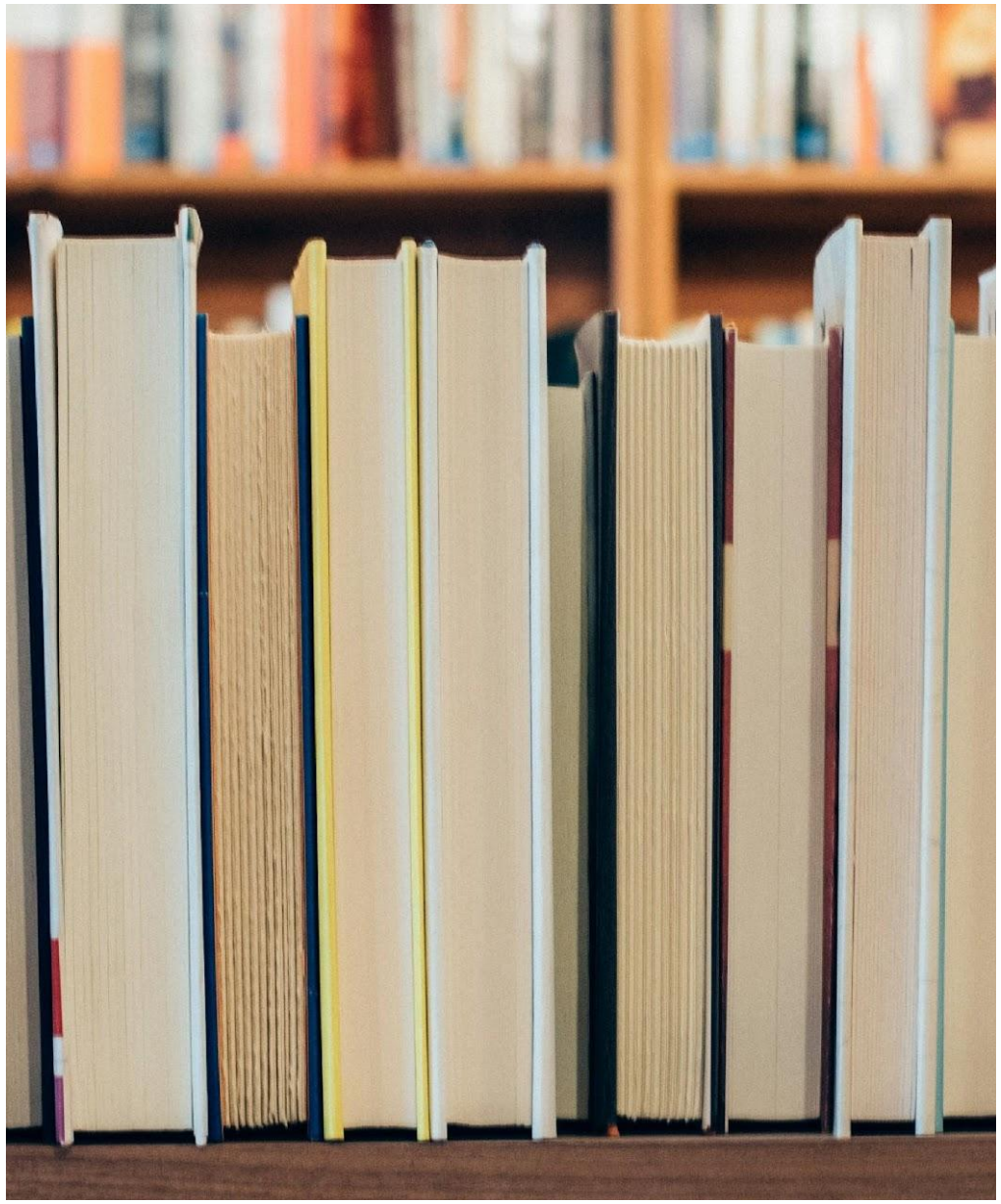

References

Data sources include the following; additional resources will be shared in a separate document for participants:

USDA NASS – 2021 Certified Organic Survey – Summary & State Highlights
https://downloads.usda.library.cornell.edu/usda-esmis/files/zg64tk92g/2z10z137s/bn99bh97r/cenorg22.pdf

USDA NASS – 2022 Census of Agriculture – Organic Highlights
https://www.nass.usda.gov/Publications/Highlights/2024/Census22_HL_Organic.pdf

USDA ERS – Organic Agriculture: U.S. Organic Market Overview
https://www.ers.usda.gov/topics/natural-resources-environment/organic-agriculture/

USDA ERS – Organic Situation Report, 2025 Edition (EIB-281)
https://www.ers.usda.gov/publications/pub-details/?pubid=110883

USDA AMS – Organic Economic & Market Information
https://www.usda.gov/farming-and-ranching/organic-farming/organic-economic-and-market-information

USDA NASS – Guide to Organic Production Surveys
https://www.nass.usda.gov/Surveys/Guide_to_NASS_Surveys/Organic_Production/

OTA – Detailed State Profiles (All States)
https://ota.com/download-details-about-organic-your-state

Note: State-specific data was sourced from OTA fact sheets and USDA NASS organic program publications. Links reflect federal and national resources that are actively maintained and publicly accessible.

Learn More about the Organic Sector Nationally

USDA NOP Organic Integrity Database
https://organic.ams.usda.gov/integrity/

https://www.organictransition.org/region/national/

https://ota.com/resources

https://find.organic/

https://ofrf.org/resources/topp/

https://www.nationalorganiccoalition.org/national-topp-meetings-resource-page

Rodale Institute Consulting:
https://rodaleinstitute.org/education/resources-overview/

https://ota.com/oats

Organic Grain Market Outlook and Strategies

Learn More about the Organic Sector in the Your Region

TOPP's Organictransition.org Website

Each TOPP region has compiled and developed resources for transitioning farmers and producers. Click "Resources," then search or filter by topic and region.

USDA NOP Organic Integrity Database
https://organic.ams.usda.gov/integrity/

The USDA's Organic Integrity Database is a searchable database of all USDA-certified organic producers. Search and filter by state, certifier, scope of certification and specific crops.

OTA State–Based Fact Sheets
https://ota.com/download-details-about-organic-your-state

The Organic Trade Association creates annually updated fact sheets for each state, detailing the number of organic operations, organic acreage, and other data.

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DISCUSSION

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