



A FARMER'S TOOLKIT | REGIONAL MODULE

MIDWEST

NOVEMBER | 2025

TOOLKIT PART 2

MIDWEST REGIONAL SNAPSHOT





MIDWEST REGIONAL

Wolf & Associates
THE ORGANIC SPECIALISTS

 **NATIONAL**
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

 **ORGANIC
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Organic Market Strengths in the Midwest

The Midwest — Minnesota, Iowa, Missouri, Arkansas, Wisconsin, Illinois, Kentucky, Tennessee, Michigan, Indiana, and Ohio — is a foundation of American agriculture, and its role in organic production is growing rapidly. From the organic dairy barns of Wisconsin to the cornfields of Iowa and Illinois, and from Arkansas's expanding poultry sector to Michigan's diversified row crop production, the region is foundational to the future of organic.

SUPPORTING FACTS

- While each state brings distinct strengths, together they contribute over **2.5 million certified organic acres** and **over \$1.86 billion** in annual organic sales — making the Midwest the largest contiguous block of organic economic activity in the country.
- **Midwestern farmers are national leaders in core organic commodities** — from dairy and livestock to grains, oilseeds, and eggs. The region ranks first in the nation for organic milk, egg, and soybean production, with multiple states among the top ten across key crop and animal categories.
- **The Midwest is positioned for rapid growth** — with strong R&D investment, increasing household demand, and thousands of operations planning to expand. Nearly every state in the region has seen double-digit sales growth since 2019, and over 40% of farms in some states report plans to scale up organic production in the next five years.

Organic Market Strengths in the Midwest

KEY FACTS:

- **Total Certified Organic Acreage:**
~1.29 million acres across the 11 states
- **Annual Combined Organic Sales:**
~\$1.86 billion
- **Organic Operations:**
Over 8,134 certified organic businesses
- **Key Production Areas:**
Dairy, eggs, corn, soybeans, regional produce & poultry dominate across multiple states
- **Regional Reach:**
From bulk commodities to high-value specialty products, the Midwest feeds both local and national markets

STRATEGIC IMPORTANCE

The Midwest's role in U.S. organic agriculture goes far beyond acreage. With robust infrastructure, strong R&D investment, and a deep farming tradition, this region is:

- **A feed and food engine** for organic livestock systems
- **A transition opportunity zone** with many conventional operations showing interest in going organic
- **A rural jobs driver** where organic supports value-added processing and regional economies
- **A climate-resilience laboratory**, especially in corn-soy systems that are shifting toward regenerative and organic

THE MIDWEST BY STATE

Regional Overview - Chart by State

STATE	CERTIFIED OPERATIONS (2025)	CERTIFIED ACRES (2025)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Arkansas	179	21,624	Eggs, chickens, tomatoes	8th nationally for organic animals; 73% of households buy organic
Illinois	810	150,154	Corn, soybeans, eggs	41% of organic farms plan expansion
Indiana	959	97,045	Milk, eggs, grains	7th in nation for animal and egg sales (\$59M, \$57M)
Iowa	943	197,192	Corn, soybeans, eggs	5th in nation for farmgate sales (\$159M)
Kentucky	249	19,435	Eggs, milk, soybeans	78% of households buy organic
Michigan	792	159,396	Corn, soybeans, dry beans	83% of households buy organic
Minnesota	881	217,315	Milk, corn, soybeans	\$16.5M in OREI & ORG funding supports R&D
Missouri	602	62,157	Eggs, soybeans, corn	#1 in U.S. for organic egg sales (\$142M)
Ohio	1,004	116,565	Eggs, milk, corn	7th nationally in total organic operations
Tennessee	107	5,338	Eggs, corn, tomatoes	Expanding organic vegetable sector
Wisconsin	1,608	241,080	Milk, eggs, cattle	4th in operations, 10th in acres; \$107M milk sales

Regional Overview – Analysis

ELEVEN STATES, ONE STRATEGIC REGION FOR ORGANIC ACREAGE, OUTPUT, AND GROWTH

While often grouped as a single geographic region, each of the Midwest states brings distinct strengths to the national organic landscape. Together, they offer a mix of high-volume staples, market-ready livestock products, diversified specialty crops, and deep consumer demand — making the Midwest indispensable for scaling U.S. organic supply.

Wisconsin

Ranks #1 nationally in organic dairy with strong milk, egg, and cattle systems and nearly 1,800 organic businesses.

Iowa & Illinois

These twin corn belt states produce high volumes of organic corn, soybeans, and eggs — supported by significant infrastructure and hundreds of organic farms.

Michigan & Indiana

Leaders in both crops and livestock, with growing consumer demand and deepening support for soil health and sustainable systems.

Missouri & Arkansas

Standouts in organic egg and poultry production — Missouri leads the nation in organic egg sales, and Arkansas ranks top ten in animal sales..

Minnesota & Ohio

Broad-based organic strength: grain, milk, soybeans, and eggs, plus over 2 million consumers in each state regularly purchasing organic.

Kentucky & Tennessee

Small but fast-growing markets with strengths in eggs, tomatoes, milk, and regional distribution — poised for expansion and diversification.

HIGH OPPORTUNITY CROPS





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HIGH OPPORTUNITY CROPS | FEEDING THE NATION

Organic Grains, Dairy, Livestock & Specialty Crop

The Midwest is uniquely positioned to drive growth across nearly every organic category — with deep infrastructure for grains and livestock, expanding capacity in dairy and eggs, and a rising opportunity in regionally adapted specialty crops.

Grains & Oilseeds

The heart of the U.S. Corn Belt lies in the Midwest — and with it, a stronghold for organic corn, soybeans, and small grains.

Top States: Iowa | Illinois | Minnesota | Michigan

Highlights

- Over 600,000 combined acres in organic corn and soybeans
- Strong infrastructure for storage, transport, and processing

Opportunity

- Expand into rotational legumes (dry beans, peas)
- Boost organic small grains (oats, barley) for regional buyers
- Connect grain growers to nearby livestock and egg markets



HIGH OPPORTUNITY CROPS

Dairy, Egg & Livestock

Dairy and egg systems are mature and expanding in the region — with strong organic household demand.

Top States: Wisconsin, Ohio, Indiana, Missouri, Kentucky

Highlights

- Wisconsin is #1 in organic milk
- Missouri is #1 in organic egg sales
- Indiana, Kentucky, and Arkansas all report \$50M+ in annual organic animal product sales

Opportunity

- Support pasture-based livestock transitions in IL, TN, and AR
- Build out organic feed supply chains near dairy and poultry clusters



HIGH OPPORTUNITY CROPS

Specialty & Regional Crops

The region is seeing growing success in non-commodity systems that serve local and regional markets.

Examples:

- Tomatoes (AR, TN)
- Beans (MI)
- Hay (WI, OH)
- Tree Fruit (MI, WI)

Opportunity

- Scale up organic produce for regional grocers and CSAs
- Support perennial crop transitions in southern states
- Leverage greenhouse and hoop house potential for extended season sales

High Opportunity Crops – Analysis

High Opportunity Crops – Strategic Takeaways

- The Midwest offers the **most diverse mix** of organic farm types, commodities, and market channels in the country.
- The region's **density of infrastructure, institutions, and organic experience** makes it ideal for both scaling and diversifying supply.
- Targeted investments in **rotation support, organic dairy feed, and value-added processing** will unlock rapid gains in acreage, quality, and farmer profitability.
- As consumer demand rises in metro centers from Chicago to Minneapolis to Cincinnati, the Midwest can serve as a regional supply engine with national impact.



REGIONAL ONSHORING OPPORTUNITIES



REGIONAL ONSHORING OPPORTUNITIES

From Exporter to Engine: Reinvesting Organic Value in the Midwest

The Midwest exports vast quantities of organic grain, milk, and meat — yet much of the processing, branding, and consumer packaging happens elsewhere.

Why Onshoring Matters:

- Keeps more value in-region, supporting rural jobs and resilience
- Reduces reliance on coastal infrastructure vulnerable to disruption
- Accelerates climate adaptation with shorter supply chains and better transparency
- Strengthens regional identity for organic brands — “Midwest-grown, Midwest-made”

CATEGORY	COMMON IMPORTS	U.S. IMPORT VALUE	REGIONAL OPPORTUNITY	MIDWEST ADVANTAGE
Organic Feed Grains	Soybeans, Corn, Feed Mixes	\$300M+ (organic soy imports, est.)	Build localized grain-to-feed pipelines for organic poultry, dairy, and hog systems	Established grain base, lower land costs, proximity to livestock hubs
Animal Protein Processing	Packaged Eggs, Organic Meat Cuts	\$200M+ (organic meat and eggs, est.)	Invest in mobile/co-op slaughter and egg handling facilities	High animal product output in WI, MO, IN, KY, AR; limited regional processing
Vegetables & Pulses	Carrots, Dry Beans, Leafy Greens	\$500M+ (fresh & frozen vegetables)	Scale vegetable and bean production with local washing/ packing capacity	Strong acreage base in MI, IL, WI; opportunity for diversified and rotational crops
Dairy Bottling & Branding	Organic milk (shipped to distant plants)	N/A – Limited import but centralized processing	Expand mid-size organic creamery and private label bottling capacity	Midwest leads in organic dairy (WI, OH, MN); ready for regional market differentiation
Institutional Procurement	Fresh produce dairy, shelf-stable goods	N/A – Sourced out-of-region, not internationally	Connect producers to local schools, hospitals, and universities via food hubs	High production volume + strong land grant / institutional networks

REGIONAL GENERAL OPPORTUNITIES



REGIONAL GENERAL OPPORTUNITIES

Growing Regional Organic Supply: KEY TARGETS

OPPORTUNITY AREA	WHY IT MATTERS
Organic Feed Grains	Backbone of national dairy and poultry systems; Midwest leads in acreage and is key to reducing imports.
Dairy & Pasture-Based Livestock	Midwest is the top organic dairy region; pasture systems reduce input costs and increase animal health.
Dry Beans & Pulses	Supports crop rotation, soil health, and protein supply; strong growth in Michigan and Minnesota.
Vegetables (Tomatoes, Greens, Roots)	High consumer and institutional demand; suited for expansion in WI, IL, MI, TN, and AR.
Eggs & Broilers	Midwest includes top national egg producers; strong growth in MO, AR, KY, and IN with room to scale.
Specialty Grains (Oats, Heritage Corn)	Adds crop diversity and resilience; growing retail demand for gluten-free and heirloom grain varieties.
Milk Processing & Bottling	Opportunity to retain value in-region; addresses bottlenecks in processing and expands Midwest branding.
Institutional Channels	Strong alignment with Midwest schools and hospitals; large-scale supply meets large-scale demand.

BARRIERS & SOLUTIONS



BARRIERS & SOLUTIONS

Challenges to Expanding Midwest Organic Supply

Key Takeaways:

The Midwest has the scale and capacity to lead U.S. organic growth, but realizing that potential depends on expanding infrastructure, supporting transitions, and building regionally integrated markets that keep organic value close to home.

BARRIER	SOLUTION
Limited organic grain processing & storage	Expand regional cleaning, milling, and feed infrastructure to retain value in-region
High cost of transition and certification	Provide transition cost-share, technical assistance, and mentorship programs through TOPP partners
Feed supply-demand imbalance	Strengthen organic feed networks and grain-livestock coordination within the region
Conventional dominance in corn-soy systems	Promote rotational diversification (oats, small grains, dry beans) and regenerative transition support
Market access gaps for smaller farms	Support co-ops, shared distribution hubs, and regional branding (“Midwest-grown, Midwest-made”)
Labor and technical training shortages	Expand organic workforce development and cross-state apprenticeship initiatives
Weather variability and climate stress	Invest in resilient systems—cover crops, perennials, and adaptive grazing—to build long-term stability

LOOKING AHEAD

The Midwest Region: A Strategic Driver for the Next Era of Organic

With over 2.5 million organic acres, some of the country's strongest production systems, and a rapidly growing consumer base, the Midwest is positioned to lead the next wave of growth in U.S. organic agriculture.

Its ability to deliver foundational commodities like grains, milk, eggs, and poultry — while diversifying into climate-resilient and value-added systems — makes the region indispensable for a resilient and scalable organic supply chain. With targeted investments in infrastructure, technical support, and market development, the Midwest can unlock a more self-sufficient, profitable, and nationally integrated future.

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The Core of U.S. Organic Production

The Midwest already leads in organic grains, milk, eggs, and soy — supplying foundational ingredients to buyers across the country. Its continued strength is essential to national supply chain stability.

Transition Momentum Is Growing

Midwestern states report some of the highest percentages of farms planning to increase organic production — driven by policy support, soil health goals, and strong retail demand.

Underused Infrastructure = Big Opportunity

The region has existing elevators, bottling lines, and meat facilities that could serve organic markets — but need investment and coordination to unlock full potential.

Metro Markets Can Power Regional Brands

From Chicago and Minneapolis to Detroit and Cincinnati, the Midwest's cities are home to millions of organic shoppers. That demand can anchor regionally grown, regionally processed supply chains.



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 Midwest 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://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/)

<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.

- [OV_Nov2025 - Organic Farmers Association](#) P.18, P. 30-32

THANK YOU
DISCUSSION

