

A FARMER'S TOOLKIT | REGIONAL MODULE

# NORTHEAST

NOVEMBER | 2025



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## TOOLKIT PART 2

# NORTHEAST REGIONAL SNAPSHOT







## Organic Market Strengths in the Northeast

The Northeast is one of the most mature and dynamic organic markets in the U.S. High consumer awareness, strong regional identity, and close proximity between farms and consumers drive consistent growth. The region's legacy of diversified, small-to-medium farms and robust food networks make it a national leader in organic adoption and resilience.

### SUPPORTING FACTS

**Consumer Demand and Market Reach** The Northeast has some of the highest rates of organic food consumption in the U.S. This is driven by dense population centers, strong health and environmental values, and a deep cultural connection to local and sustainable food systems.

**Opportunities for Northeast Producers** With climate-appropriate crops, resilient farming systems, and engaged consumers, the Northeast is well positioned to lead the next phase of regionalized, resilient organic supply chains.

**Tie to National Strategy** Many high-demand organic categories — including feed grains, berries, and leafy greens — are still heavily imported. Expanding production across the Northeast offers a strategic opportunity to reduce import dependence, strengthen local economies, and enhance consumer trust in organic.

# Organic Market Strengths in the Northeast

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Organic production is a vital and growing force across New England, where high consumer demand, strong per-capita organic adoption, and climate-resilient farming practices converge. The region is home to several national leaders in organic acreage, innovation, and farmgate growth.

## SUPPORTING FACTS

- **High Consumer Demand:** Organic household penetration is consistently high — **87–89%** across most states.
- **Organic Acreage Leadership:** Four New England states rank in the top five nationally for share of farmland certified organic.
- **Growth Mindset:** Many farms plan to expand organic production, especially in Rhode Island (61%) and Maine (40%).
- **Top Commodities:** Milk, maple syrup, berries, tomatoes, and leafy greens are consistent drivers across the region.
- **Organic Businesses:** Over **2,000 organic businesses** operate across the six states

THE NORTHEAST  
BY STATE

Regional  
Overview -  
Chart by State

STATE	CERTIFIED OPERATIONS (2025)	CERTIFIED ACRES (2025)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Connecticut	162	34,790	Tomatoes, squash, lettuce	87% of households buy organic
Maine	496	70,772	Milk, maple syrup, blueberries	4th nationally in share of organic farmland (11%); \$8.5M OREI/ORG funding
Massachusetts	309	4,082	Milk, lettuce, cranberries	85% of households buy organic; 50% of counties are “organic hotspots”
New Hampshire	121	11,091	Milk, maple syrup, tomatoes	89% of households buy organic
New York	2,003	985,648	Milk, eggs, cattle	2nd nationally in operations and acres; \$31M in OREI/ORG funding
Rhode Island	51	174	Tomatoes, onions, lettuce	88% of households buy organic
Vermont	825	200,989	Milk, maple syrup, cattle	88% of households buy organic; \$9M in OREI/ORG funding

# Regional Overview – Analysis

## SEVEN STATES, ONE COHESIVE ORGANIC POWERHOUSE

The Northeast combines dense consumer markets, diversified small- to mid-scale farms, and strong institutional and policy support. Together, its seven states represent a compact but high-performing region where organic production, processing, and demand are deeply intertwined—making it a model for regional food resilience.

### Key Takeaways:

The Northeast blends mature organic markets with strong institutional infrastructure, creating an outsized impact relative to its geographic size and acreage.

### New York

Ranks among the top five U.S. states in certified organic acreage and sales, with strengths in dairy, vegetables, and grains, and a robust processing and distribution network.

### Vermont

Leads the nation in organic market share per capita, with organic milk dominating the state's agricultural economy and strong momentum in grains, vegetables, and maple.

### Maine

National leader in organic acreage density and diversified production, spanning dairy, vegetables, and grain. Home to pioneering organic policy and technical support organizations.

### Massachusetts & Connecticut

High per-acre productivity and strong consumer-driven markets, powered by direct sales, CSAs, and institutional procurement programs supporting small-scale producers.

### New Hampshire & Rhode Island

Smaller states with strong retail demand and emerging producer networks; focus areas include vegetables, small fruit, and value-added specialty foods serving dense metro markets.

# HIGH OPPORTUNITY CROPS



HIGH OPPORTUNITY CROPS

The Northeast’s climate and proximity to major markets make it ideal for diversified, high-value organic produce.

Protected and controlled - environment agriculture can extend seasons and reduce reliance on imports.

CROP	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Berries (blueberries, raspberries)	Very High	Insufficient	High opportunity for protected agriculture (tunnels, greenhouses)	Year-round retail and foodservice demand; shoulder-season gaps drive premium pricing.
Leafy Greens (spinach, lettuce, kale)	High	Strong seasonally, weak winter	Extend season with greenhouses and CEA	Core category for health-conscious consumers; winter production allows local sourcing and price stability.
Apples	High	Good but weather-vulnerable	Strengthen storage infrastructure for year-round supply	Shopper staple with strong regional identity; post-harvest investment can reduce imports.



HIGH OPPORTUNITY CROPS

Diversified specialty crops and value-added products strengthen farm income and regional food resilience.

**Key Takeaway:**  
Investing in high-margin niche crops and regional processing can boost profitability and market resilience.

CROP	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Mushrooms (shiitake, oyster)	Growing	Undersupplied	Booming specialty markets; low land footprint	High-margin, year-round crop aligned with regenerative diversification and specialty buyer interest.
Tomatoes (fresh + processing)	Moderate–High	Seasonally limited	Opportunities in fresh and value-added	Consumer demand for local and clean-label sauces, salsas, and fresh produce; short season creates processing potential.
Herbs (basil, cilantro, parsley)	Rising	Small-scale supply	Year-round production opportunity	High restaurant and grocery demand; easy to scale in protected environments; freshness differentiates local suppliers.

HIGH OPPORTUNITY CROPS

Grains and dairy remain the backbone of the Northeast organic economy.

Strengthening these sectors ensures stability across the value chain.

CROP / SECTOR	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Grains (corn, soy for feed)	Very High	Shortfall, with growth in NY	Critical for organic dairy resilience	Reliance on imported organic feed undermines integrity and price stability; expanding regional production supports local dairy and poultry.
Dairy	High	Strong in NY and VT	Anchor of regional organic sector	Drives demand for regional grains, pasture, and infrastructure; provides steady income and supports rural economies.

# High Opportunity Crops – Analysis

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## High Opportunity Crops – Strategic Takeaways

### **Key Takeaway:**

Season extension and storage investments can turn regional climate challenges into year-round market advantages.

### **Key Takeaway:**

Investing in high-margin niche crops and regional processing can boost profitability and market resilience.

### **Key Takeaway:**

Expanding regional grain and feed production reinforces the dairy sector—the cornerstone of Northeast organic agriculture.





# REGIONAL ONSHORING OPPORTUNITIES



REGIONAL ONSHORING  
OPPORTUNITIES

Turning Organic Import  
Dependence into Regional  
Supply Strength

The Northeast is well positioned to reduce U.S. dependence on organic imports in several high-demand categories. Expanding protected agriculture, feed grain programs, and regional processing capacity can unlock major opportunities for growers across the region.

**Key Takeaway:**  
The Northeast has climate-appropriate crops, active organic infrastructure, and strong market proximity. By converting imports into local production, the region can build resilience, enhance economic returns, and reinforce consumer trust in organic.

CATEGORY	COMMON IMPORTS	U.S. IMPORT VALUE	REGIONAL OPPORTUNITY	NORTHEAST ADVANTAGE
Berries	Blueberries, raspberries (off-season)	\$1.6B+ (est.)	Extend season with tunnels, greenhouses	Strong consumer demand; high-value crop; scalable with protected ag
Leafy Greens	Lettuce, spinach (winter)	Part of \$5.7B produce total	Invest in winter production infrastructure	Year-round demand; existing grower base; local freshness premium
Tomatoes (fresh + processed)	Roma, cherry, paste (Mexico, Italy)	\$3.6B	Support both field and value-added tomato production	New York’s processing infrastructure supports sauces/salsas; strong seasonal base across NE
Herbs	Basil, cilantro, mint	\$952M	Year-round herb production in greenhouses and protected systems	Popular in retail + foodservice; easy to scale in protected settings
Organic Grains for Feed	Corn, soy	\$2B	Expand regional feed grain capacity	Critical to sustain local dairy and egg sectors. New York has significant acreage potential to reduce import dependence and support dairy resilience
Maple & Specialty Syrups	Canada-sourced organic maple	~\$300M est.	Strengthen domestic identity and traceability	Cultural anchor crop; opportunity for premium positioning

# REGIONAL GENERAL OPPORTUNITIES





REGIONAL GENERAL OPPORTUNITIES

Growing Regional Organic Supply: KEY TARGETS

Opportunity Area	Why It Matters
Berries	Extend the production season with protected ag to meet year-round demand.
Leafy Greens	Winter production has huge growth potential, especially using greenhouses and tunnels.
Herbs	Strong foodservice and retail demand; scalable in greenhouses and small systems.
Organic Grains for Feed	NY offers scale to support regional organic dairy and egg systems.
Apples	NY is a national leader; investing in storage can support year-round supply.
Mushrooms	High-value, low-footprint crop; well suited for diversified and small farms.
Tomatoes	Major opportunity for value-added processing; infrastructure already exists in NY.

# BARRIERS & SOLUTIONS



**BARRIERS & SOLUTIONS**

Challenges to Expanding Northeast Organic Supply

**Key Takeaway:**  
Targeted investment in infrastructure, protected agriculture, and workforce development can transform the Northeast’s structural challenges into pathways for resilient, year-round organic growth.

BARRIER	SOLUTION
Short growing season	Expand protected and controlled-environment agriculture (greenhouses, tunnels) to extend production and stabilize winter supply
Weather variability and storm risk	Diversify crop systems and invest in soil health, drainage, and perennial plantings to build resilience
Limited storage and processing capacity	Develop shared cold storage, packing, and small-scale processing hubs to reduce waste and extend market reach
Organic feed shortages	Expand regional grain and feed programs—especially in New York—to support dairy and livestock producers
Labor constraints	Strengthen farmworker programs, housing, and cross-state training initiatives to ensure consistent seasonal labor
High land and input costs	Support cost-share, transition grants, and cooperative equipment models to lower entry barriers
Fragmented distribution networks	Build stronger regional marketing and logistics collaborations to connect farms with nearby urban markets



## LOOKING AHEAD

Consumer demand for organic is growing fast — at twice the rate of the overall food market. With strong local food cultures, deep organic roots, and a dense network of farms and businesses, the Northeast is uniquely positioned to lead the next wave of organic growth. Scaling local production of in-demand crops can reduce import dependence, meet year-round market needs, and keep more value in the region.

- **The Northeast leads on acreage and business density.** States like VT, ME and CT have the highest organic acreage shares in the US, and New York ranks #2 in the number of organic businesses.
- **Key crops present strong expansion potential.** Berries, leafy greens, tomatoes, herbs, and grains are high-growth categories where local supply still lags behind booming consumer demand.
- **Regional supply chains offer clear advantages.** Buyers and consumers value the freshness, transparency and resilience that local sourcing delivers.
- **Organic + Regional = Trust.** The Northeast has a strong reputation for integrity. Combining that with place-based branding and year-round availability will strengthen consumer loyalty and buyer interest.





# 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](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/](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://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](https://www.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)**  
<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.

- [The Organic Agriculture Industry in Pennsylvania - Econsult Solutions, Inc.](#)

2025 Connecticut Organic Market Study; Sherlene Rodriquez from CT NOFA  
[rodaleinstitute.sharepoint.com/sites/Consulting/DocumentLibrary/Forms/AllItems.aspx?id=%2Fsites%2FConsulting%2FDocumentLibrary%2FMarkets%2FbyRegion%2FNortheast%2FCT DoAg 2025 Organic Market Study %28Final 062425%29%2Epdf&parent=%2Fsites%2FConsulting%2FDocumentLibrary%2FMarkets%2FbyRegion%2FNortheast&p=true&ct=1762190506081&or=OWA-NT-Mail&cid=ee9d2068-4c30-980b-b0fc-a6c7776a07d2&ga=1](https://rodaleinstitute.sharepoint.com/sites/Consulting/DocumentLibrary/Forms/AllItems.aspx?id=%2Fsites%2FConsulting%2FDocumentLibrary%2FMarkets%2FbyRegion%2FNortheast%2FCT%2FDoAg%2F2025%2FOrganic%2FMarket%2FStudy%2FFinal%2F062425%29%2Epdf&parent=%2Fsites%2FConsulting%2FDocumentLibrary%2FMarkets%2FbyRegion%2FNortheast&p=true&ct=1762190506081&or=OWA-NT-Mail&cid=ee9d2068-4c30-980b-b0fc-a6c7776a07d2&ga=1)



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THANK YOU

## DISCUSSION

