

A FARMER'S TOOLKIT | REGIONAL MODULE

NORTHWEST

NOVEMBER | 2025

TOOLKIT PART 2

NORTHWEST REGIONAL SNAPSHOT





Organic Market Strengths in the Northwest

Organic agriculture is thriving across the Northwest, where a long-standing commitment to ecological farming, high consumer demand, and favorable growing conditions converge. The region includes national powerhouses like Washington and Oregon, along with high-acreage states like Montana and Idaho that are positioned for continued expansion. Together, these states drive significant organic output across diverse crops and livestock systems.

SUPPORTING FACTS

- **Powerhouse States with Proven Performance**

Washington ranks #2 in the U.S. for organic sales (\$1.14B), while Oregon is a top-10 leader in both acreage and farmgate value — together forming the backbone of the region's organic economy

- **Acreage Scale Meets Growth Potential**

Montana and Idaho contribute over 800,000 certified organic acres combined, ranking among the top five states nationally and offering enormous room to scale production and diversify supply

Organic Market Strengths in the Northwest

KEY TAKEAWAY

The Northwest is a backbone of U.S. organic supply — combining large-scale acreage in Montana and Idaho with diversified production and processing hubs in Oregon and Washington.

Together, these states define a true frontier of organic growth, innovation, and climate adaptation.

REGIONAL TOTALS

- **2,824 Certified Organic Operations**
- **~1.39 Million Certified Organic Acres**
- **Top Sectors: Grains, Dairy, Livestock, and Specialty Fruit**

THE NORTHWEST
BY STATE

Regional
Overview -
Chart by State

STATE	CERTIFIED OPERATIONS (2025)	CERTIFIED ACRES (2025)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Alaska	12	1,292	Vegetables, tomatoes, herbs	Focused on cold-hardy crops compatible with short season
Idaho	333	381,575	Milk, hay, barley	6th nationally in certified acres; 88% of households buy organic
Montana	308	451,476	Eggs, wheat, cattle	4th nationally in certified acres; 85% of households buy organic
Oregon	852	308,025	Milk, blueberries, hay	47% of counties are “organic hotspots”; strong diversified markets
Washington	1,253	109,802	Apples, eggs, chickens	5th nationally in number of operations; 92% of households buy organic
Wyoming	78	138,183	Wheat, hay, millet	90% of households buy organic

Regional Overview – Analysis

FIVE STATES ANCHORING U.S. ORGANIC PRODUCTION AND INNOVATION

While it covers fewer states than other regions, the Northwest is a powerhouse of organic agriculture—anchored by Washington and Oregon, with Montana, Idaho, and Alaska each contributing unique strengths. Together, they represent one of the nation’s highest-value clusters of organic acreage, innovation, and market leadership.

The region’s balance of diverse climates, advanced infrastructure, and forward-thinking policy makes it central to the continued expansion of U.S. organic supply.

Washington

Ranks #2 nationally in organic farmgate sales at \$1.14 billion, with a 29% increase from 2019 to 2021. Strong across produce, dairy, and specialty crops.

Oregon

Ranks #10 for organic sales (\$386.2 million) and reports over 490,000 certified acres in production. A leader in berries, vegetables, and value-added processing.

Montana

Ranks #3 nationally in organic acreage (478,930 acres), focused on grains, oilseeds, and cattle, with rapidly growing consumer markets in Bozeman and Missoula.

Idaho

Ranks #9 in organic acreage (372,000 acres) and produces the nation’s largest supply of organic potatoes and hay—critical feed inputs for Western dairy systems.

Alaska

Though small in acreage, Alaska’s organic sector is expanding rapidly, supported by strong consumer demand and direct-to-market distribution channels.

HIGH OPPORTUNITY CROPS



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The Northwest's diverse climate zones and expansive farmland support a wide range of high-potential organic systems.

From perennial fruit crops to extensive grain rotations and pasture-based livestock, the region is well positioned to expand both high-volume staples and high-value specialty production.

Tree Fruit & Berries — The Northwest's Signature Organic Sector

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Top States: Washington, Oregon

Highlights:

- **Washington and Oregon** together account for the majority of U.S. organic apple, pear, cherry, and blueberry production.
- **Washington's** organic apple acreage alone exceeds 35,000 acres, representing nearly 90% of the national total.
- **Oregon** leads in organic blueberries and tree nuts and has expanding small- fruit processing capacity along the Willamette Valley corridor.

Opportunity:

- Expand organic tree fruit acreage into diversified mixed-fruit and integrated pest management systems.
- Build out cold storage, packing, and juice/dried fruit processing infrastructure to support mid-scale producers.

HIGH OPPORTUNITY CROPS

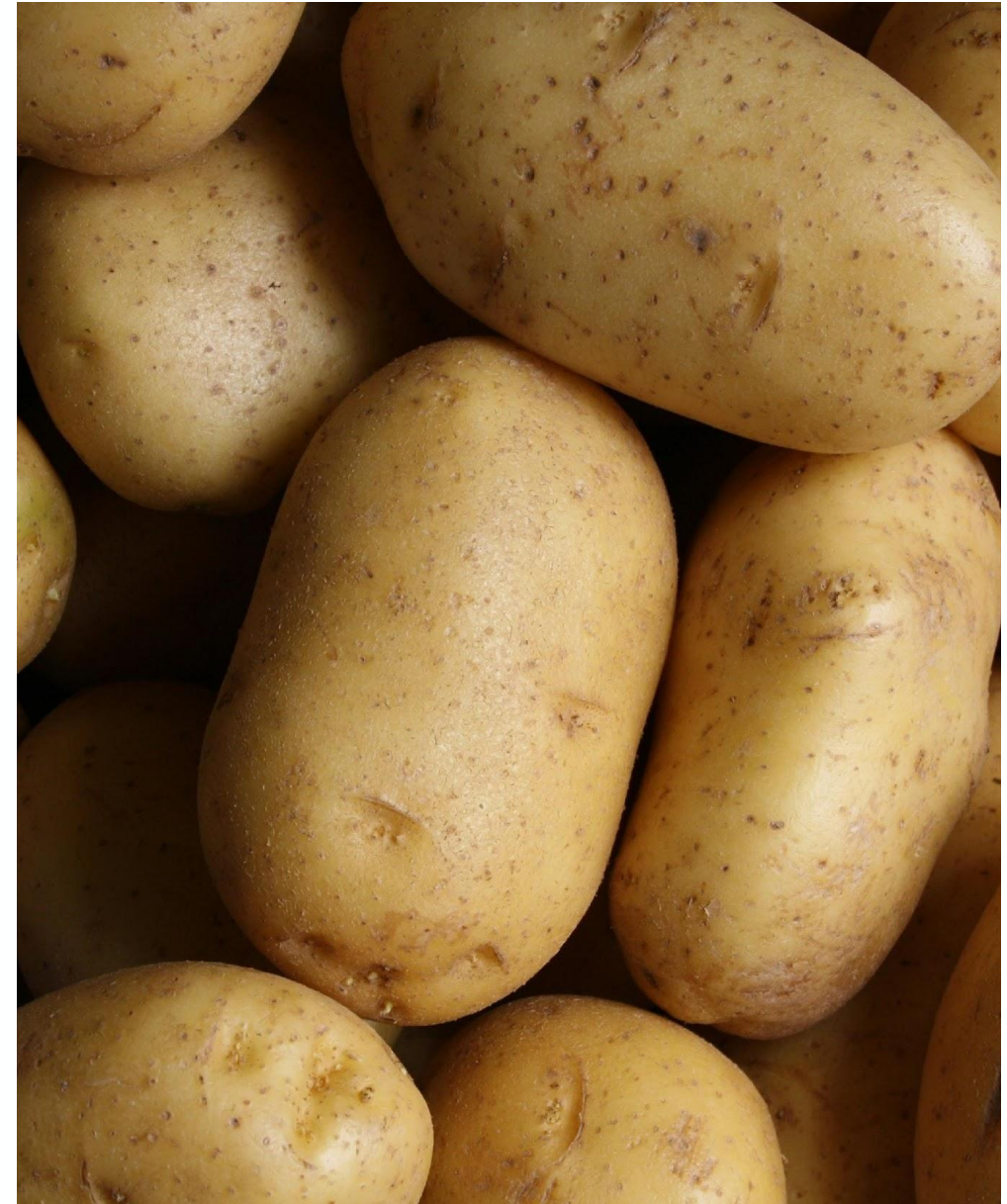
Grains, Pulses, Potatoes & Dairy — The Heart of the Interior Northwest

The Inland Northwest offers vast acreage and expertise in dryland farming and livestock systems, positioning it as a critical source of organic feed, grains, and milk for the nation.

Top States: Montana, Idaho, Oregon

Highlights:

- **Montana** ranks #3 nationally in organic acreage, producing wheat, barley, and lentils for national and export markets.
- **Idaho** ranks #9 in acreage and leads the nation in organic potatoes and hay, while also emerging as a top organic dairy state.
- **Oregon's** Willamette Valley supports organic grain rotations and value-added feed processing for dairy and egg systems.
- **Opportunity:**
Strengthen regional grain-to-feed supply chains for organic dairy, poultry, and beef production.
- Increase rotational crop adoption (pulses, small grains) to boost soil health and resilience.
- Support mid-size dairies with access to feed, bottling, and co-op marketing.



HIGH OPPORTUNITY CROPS

Vegetables, Livestock & Emerging Markets — Expanding Regional Diversity

Beyond fruit and grains, the Northwest is growing its footprint in diversified vegetables, pasture-based livestock, and regional distribution systems.

Top States: Washington, Oregon, Montana, Alaska

Highlights:

- **Washington and Oregon** produce high-value organic vegetables—carrots, greens, and tomatoes—for regional and national markets.
- **Montana and Idaho** support expanding organic poultry, beef, and egg operations connected to local and regional processors.
- **Alaska's** organic sector has doubled since 2019, focusing on greenhouse-grown vegetables and institutional supply chains.
- **Opportunity:**
Expand organic vegetable production in coastal and inland valleys to meet growing regional demand.
- Support pasture-based livestock transitions in MT and ID to strengthen feed-to-meat traceability.
- Leverage the region's brand identity and strong consumer markets to grow regional "Northwest Organic" supply chains.



High Opportunity Crops – Analysis

The Northwest combines intensive fruit and vegetable systems in its coastal valleys with large-scale grain and livestock production inland — a uniquely balanced mix that anchors U.S. organic supply.

Key Insights:

- **Fruit & Vegetables:** WA and OR lead nationally in organic apples, pears, berries, and produce. Montana and Idaho support expanding organic poultry, beef, and egg operations connected to local and regional processors.
- **Grains & Pulses:** MT, ID, and eastern WA form a critical organic grain and pulse corridor.
- **Dairy & Livestock:** ID and OR are national leaders in organic milk; MT and WA are expanding pasture-based beef and poultry.
- **Climate Diversity:** The region's range of systems — from dryland grains to perennial fruit — supports resilience and steady expansion.

Strategic Opportunities

Invest in regional storage, processing, and distribution to keep more value in-state. Strengthen grain-to-feed and fruit-to-market infrastructure links. Expand rotational and regenerative practices to improve soil health and climate resilience. Build “Northwest Organic” identity to enhance market recognition.

Summary

With strong institutions, advanced growers, and balanced production systems, the Northwest is positioned to lead the next wave of organic innovation and regional growth.



REGIONAL ONSHORING OPPORTUNITIES



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CATEGORY	CURRENT STATUS / GAP	OPPORTUNITY TO ONSHORE
Organic Grain Supply	High output, but limited local processing or midstream infrastructure	Invest in grain cleaning, storage, and feed mill capacity in ID, MT, and WY
Fruit Processing	Apples and berries often sold fresh; value-added capacity is limited	Develop regional processing for dried, juiced, and frozen formats
Dairy Infrastructure	Robust milk production, but bottling and co-packing is concentrated	Support diversified processing and regional brand development
Vegetable Wash/Pack	Lack of shared infrastructure in interior valleys and upland areas	Build cooperative or mobile wash/pack units for MT, eastern WA, and southern OR
Cold Chain Logistics	Perishable crops need distributed cold storage	Strengthen on-farm cold storage and rural aggregation infrastructure

REGIONAL GENERAL OPPORTUNITIES



REGIONAL GENERAL OPPORTUNITIES

TARGET SYSTEMS / CROPS	CURRENT LIMITATION	WHAT'S NEEDED TO UNLOCK GROWTH
Organic Grain & Feed	Grains leave region unprocessed; feed mills are insufficient	Regional milling, storage, and market linkages for organic livestock supply
Diverse Produce Systems	Limited wash/pack and marketing access in rural zones	Expand mobile infrastructure and institutional market linkages
Regenerative Livestock Models	Grass-fed and pasture-based systems constrained by scale and capital	Capital access, value chain support, and targeted grazing TA
Climate Resilience & Transition	Emerging climate pressures on irrigation, snowpack, and drought risk	Support for climate-smart crop planning and perennial system diversification

BARRIERS & SOLUTIONS



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Challenges to Expanding Northwest Organic Supply Key Barriers and Solutions

Key Takeaways:
The Northwest’s organic sector has strong momentum but needs strategic investment in infrastructure, water resilience, and technical capacity to scale sustainably. Strengthening midstream processing, expanding transition support, and improving land access will be critical to unlocking the region’s next phase of growth.

BARRIER	PROPOSED SOLUTION
Fragmented midstream infrastructure	Invest in shared/co-op processing for grains, poultry, dairy, and produce
Climate stress and water variability	Expand support for drought-resilient systems, soil health, and perennial crops
Limited transition-ready technical support	Build regional TA networks with crop- and region-specific expertise
Land access in high-value counties	Use land trusts, incubators, and nonprofit tenure models to support new entrants
Organic grain bottlenecks	Expand storage, cleaning, and feed infrastructure to match growing acreage potential

FOCUS ON ALASKA



FOCUS ON ALASKA

Opportunity at the Edge of the Continent

While part of the Northwest TOPP region, Alaska’s geography and climate present unique challenges and opportunities.

METRIC	VALUE
Certified Organic Acres	1,292 acres (2022)
Certified Organic Businesses	12
Top Organic Crops	Vegetables, tomatoes, herbs
Farmgate Organic Sales	Not reported (assumed minimal)





STRATEGIC OPPORTUNITIES FOR ALASKA

Resilience & Innovation in a Harsh Environment

Season Extension: Use of greenhouses and high tunnels is essential to address short growing seasons.

Local Food Security: Organic production supports independence from imported produce, vital for remote communities.

Direct Sales Models: CSAs and farmers markets provide sustainable revenue for small producers.

Product Focus: Cold-hardy crops like greens, herbs, and storage vegetables.



FOCUS ON ALASKA

**Addressing Barriers
in Alaska Organics**

CHALLENGE	POTENTIAL SOLUTION
Short growing season	Greenhouse expansion, indoor ag investment
High input/shipping costs	Local composting, resource-sharing cooperatives
Certifier access limitations	Remote inspections, shared scheduling
Limited consumer awareness	Farm tours, local campaigns, institutional support



FOCUS ON ALASKA

Alaska Onshoring Opportunities

IMPORTED ITEM	ALASKA-GROWN OPTION
Leafy Greens (from WA/CA)	Hydroponic or high tunnel greens
Root Crops	Local potatoes, carrots, beets
Fresh Herbs	Indoor herb production
Eggs & Dairy	Small-scale organic operations

LOOKING AHEAD

The Future is Bright for Organic in the Northwest.

The Northwest region is a cornerstone of U.S. organic agriculture — blending decades of organic leadership with abundant land, evolving infrastructure, and a strong regional identity. With national leaders in sales and acreage, a thriving mix of crops and livestock, and growing climate-smart practices, the Northwest is well-positioned to define the next generation of resilient organic systems.

High Consumer Demand

Household organic purchasing exceeds **85–90%** in states like Washington, Oregon, and Idaho — giving the region one of the strongest consumer bases for organic in the country.

Strength in Acreage and Output

Montana, Oregon, and Idaho represent a combined **1.3 million organic acres**, while Washington ranks **#2 nationally** in organic sales — a rare combination of scale and value.

Diversity in Crops and Systems

From apples and blueberries to grains, hay, dairy, and cattle, the region produces **across climate zones and value chains**, reducing risk and supporting a dynamic organic economy.

Room to Scale

With increasing interest in transition and strong institutional support, the region is poised to expand organic acres in **grains, feed crops, and value-added processing**, especially in Montana, Idaho, and eastern Washington.



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://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.

- <https://tfrec.cahnrs.wsu.edu/organicag/organic-statistics/>
- <https://extension.oregonstate.edu/online-resource/breaking-new-ground-farmer-perspectives-organic-t...>
- <https://ir.library.oregonstate.edu/concern/articles/w95052255>
- <https://docs.google.com/spreadsheets/d/19YmBhAs9nxj7zmyrvm7xRZoS3QKBfzSzQ8P-KOu6kvw/edit?gid=0#gid=0>
- <https://ofrf.org/research/>

THANK YOU

DISCUSSION

