

Advancing Regional Organic Markets

A FARMER'S TOOLKIT

Today's Organic Market Opportunities

Organic demand in the U.S. keeps climbing, and it's outpacing the rest of the food market by a wide margin. Shoppers are spending more than \$71 billion annually on organic products, and they're seeking far more than fruits and vegetables. Top selling organic products at retail include produce, dairy, beverages, packaged goods, and value-added foods. Grains, livestock products, and value-added goods are all in demand, and often imported.

That gap between what buyers want and what U.S. farms produce is creating opportunity for transitioning operations to step in, diversify, and earn stronger margins in markets that are actively seeking new suppliers.

To help you assess opportunities as you plan for long-term, resilient organic growth, here's a peek at the national and regional demand trends, supply gaps, and tips to work effectively with buyers.

WHAT'S DRIVING GROWTH

Clean Ingredients Demand for simple, recognizable ingredients

Shrinking Price Gap Organic pricing is more competitive with conventional

Health Trends GLP-1-driven eating habits are increasing demand for cleaner foods

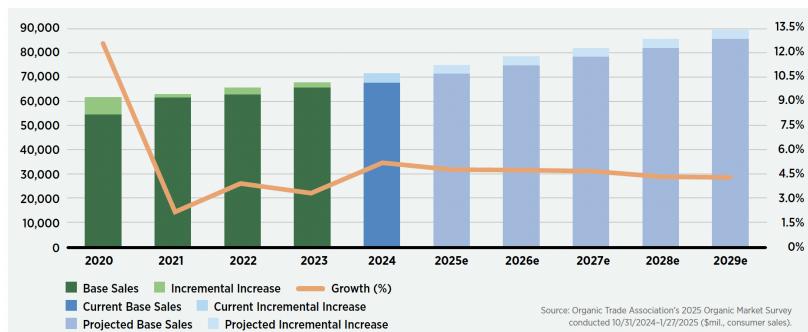
Generational Shift Millennials and Gen Z prioritize sustainability, local foods, and global flavors



NORTHWEST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

NOVEMBER 2025

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



Organic Market Snapshot

- \$71.6 billion in U.S. organic sales (2024), growing at 5.2% year-over-year
- Organic sales outpace the total food market by nearly 2x
- Organic sales are projected to exceed \$85 billion by 2029

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

Fast-Growing Organic Categories

Animal products, textiles and beverages offer potential for organic growers, particularly those willing to supply feed, diversify or add value.



Demand for organic products continues to grow, and every region has a different mix of strengths and gaps that matter for farms moving into organic.



The Northwest Organic Advantage

A Practical Guide for Farmers & Producers

The Northwest stands at the heart of U.S. organic agriculture — a region defined by large acreage, strong consumer demand, diverse climates, and a deep-rooted culture of ecological farming. Together,

Washington, Oregon, Montana, Idaho, and Alaska form a powerful organic cluster that produces everything from apples and blueberries to grains, pulses, hay, dairy, beef, and greenhouse-grown vegetables. For producers, this region offers both stability and opportunity: established markets, room for expansion, and a growing regional identity that values integrity, resilience, and innovation.

A Region Built for Organic Growth

Organic agriculture thrives in the Northwest thanks to a rare blend of scale and specialization. Washington and Oregon anchor the region with high-value fruit, vegetable, dairy, and specialty crop sectors, while Montana and Idaho contribute over 800,000 combined certified acres of grains, pulses, hay, and livestock systems — one of the largest organic land bases in the country. Alaska, though smaller in size, is quickly expanding through greenhouse production, direct marketing channels, and strong household demand for local foods.

Across these states, producers benefit from:

- **Robust consumer demand**, with organic purchasing exceeding 85–90% in states like Washington, Oregon, and Idaho
- **A strong acreage foundation**, including 1.3+ million combined organic acres in Montana, Oregon, and Idaho
- **Cross-climate resilience**, from coastal fruit valleys to interior dryland grain regions
- **Growing infrastructure**, including processing, storage, feed, and value-added facilities

For farms looking to transition, diversify, or scale, the Northwest offers one of the most supportive environments in the country.

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

What the Region Produces — and Where It's Headed



Tree Fruit & Berries: The Northwest's Signature Sector

Washington and Oregon dominate U.S. production of organic apples, pears, cherries, and blueberries — with Washington's apple acreage alone representing nearly 90% of the national total. Opportunities remain strong in mixed-fruit orchards, integrated pest management systems, and expansion of cold storage, packing, and processing capacity.

Grains, Pulses & Dairy The Engine of the Interior Northwest

Montana, Idaho, and eastern Washington form a high-value grain corridor producing organic wheat, barley, lentils, potatoes, and hay for national and export markets. Idaho and Oregon's organic dairy sectors continue to grow, supported by feed availability and emerging bottling and co-op marketing opportunities. Producers can benefit from expanding rotational systems to improve soil health and strengthen grain-to-feed supply chains.

Vegetables, Livestock & Emerging Markets

Washington and Oregon supply regional and national markets with high-value vegetables such as carrots, tomatoes, and leafy greens. Montana and Idaho's pasture-based beef, poultry, and egg systems are expanding as consumer demand for traceable, regionally grown proteins accelerates. Alaska is rapidly growing organic greenhouse vegetables and direct-to-community markets, improving local food security and season extension.

Looking Ahead: A Strong Future for Northwest Organic Agriculture

The Northwest is poised to lead the next generation of organic production in the U.S. — grounded in climate-smart practices, technical innovation, and the unmatched diversity of its farming systems. With national leaders in acreage and sales, a robust consumer base, and growing interest in transition and value-added processing, the region offers farmers a stable foundation and a wide-open frontier of opportunity.

Whether building out orchards, scaling grain rotations, transitioning livestock systems, or strengthening regional supply chains, producers across the Northwest are shaping an organic future rooted in resilience, regional pride, and shared growth.

Regional Challenges — and Producer-Led Solutions

While the region has strong momentum, farmers across the Northwest recognize a common set of constraints:

- **Midstream bottlenecks** in storage, packing, processing, and distribution
- **Limited land access** for new and transitioning producers
- **Water scarcity and climate variability** affecting yields and crop choices
- **Gaps in technical assistance**, particularly in livestock, transition planning, and regenerative systems.

Yet these barriers also point directly to the next chapter of opportunity:

- **Invest in shared infrastructure** — grain cleaning, cold storage, feed mills, and co-packing — to keep more value in the region
- **Strengthen rotational and regenerative practices** that improve drought resilience and soil health
- **Support transition programs** that reduce risk during the three-year organic conversion period
- **Build a stronger “Northwest Organic” identity** to boost visibility and market access for regional products

For many producers, addressing these bottlenecks unlocks the ability to scale sustainably and profitably.

WORKING EFFECTIVELY WITH BUYERS

“Do your homework. Go to the store and do research. Come in with your eyes wide open.”
– Kenny, Natural Foods Retail Buyer

What Do Buyers Want?

Buyers value clear communication, dependable follow-through, and partners who understand their pricing, timing, and operational constraints.

They care about the farms behind their products and appreciate growers who are transparent, collaborative, and invested in long-term relationships.



Finding and Connecting with Prospective Buyers

Attend Conferences, Trade Shows & Field Days

Events bring together retailers, distributors, chefs, and foodservice buyers looking for new suppliers.

Ask Neighbors & Fellow Producers

Farmers often know who pays well, communicates clearly, and buys consistently.

Use Directories & Market Databases

Directories help you find buyers by category, product type, or region.

Review Buyer Websites for Vendor Requirements

Many buyers provide clear instructions for new suppliers.

Typical information includes:

- Category review schedules
- Packaging, labeling, and certification requirements
- Insurance and transportation expectations
- Instructions for submitting new products or samples

Reach Out Directly

A short, targeted email or call is expected—and welcomed

Work With Your Local Food Hub or Distributor

Food hubs and regional aggregators often buy from small and mid-sized farms and already have strong relationships with retailers and institutions.

You can find additional resources and support at the links below.

markets@rodaleinstitute.org
organictransition.org/region/national

Understanding Market Nuances Grocery Buyers

It can take as long as a full year to get into the larger, national retail chains while independent retailers may be able to bring in new vendors/farmers within a matter of days.

Distributor/Wholesale Buyers

These buyers need transportation solutions that keep their trucks full. If you know of other certified organic farmers in your region, let the buyers know there is more than one reason to send a truck your way.

Institutional Buyers - School Districts and Foodservice

School districts we interviewed want organic root vegetables and correctly sized fruit, especially apples, oranges, and berries for the entire school year. Schools also often buy B grade fruit and vegetables.

Grain Buyers - Feed & Food

Ask the buyer for crop specifics before buying seed or planting. Some require particular varieties and some even offer seed programs/bulk buying opportunities for growers.

Fiber and Seed Buyers

If you grow cotton, participating in a Cotton Cooperative will greatly enhance your ability to sell your crop. If you grow seed, know all legal requirements in advance and save yourself from future headaches.