



A FARMER'S TOOLKIT | REGIONAL MODULE

# PLAINS

NOVEMBER | 2025

The background of the entire slide is a photograph of a dense, green cornfield under a clear sky. The corn plants are in the foreground, with their green leaves and yellow tassels visible. The field extends to a flat horizon in the distance.

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## TOOLKIT PART 2

# PLAINS REGIONAL SNAPSHOT





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**Wolf & Associates**  
THE ORGANIC SPECIALISTS

 **NATIONAL**  
TRANSITION TO ORGANIC  
PARTNERSHIP PROGRAM

 **ORGANIC  
TRADE  
ASSOCIATION**  **RODALE  
INSTITUTE™**

## Organic Market Strengths in the Plains

The Plains states — **Colorado, Kansas, Nebraska, North Dakota, South Dakota, and Oklahoma** — form the backbone of the U.S. organic grain and livestock feed system. While each state has distinct strengths, together they represent a strategically vital region for **organic acreage, farmgate sales, and self-sufficiency in core commodities**.

### SUPPORTING FACTS

- **Colorado** ranks **4th in the nation** for total certified organic acreage with 456,415 acres, reflecting its long-standing leadership in organic livestock systems and hay production
- **Nebraska** ranks **4th nationally in organic livestock sales**, generating over **\$106 million in farmgate revenue** in 2021, led by poultry and grain-fed systems
- **Kansas** and **South Dakota** anchor the region's **organic grain belt**, producing significant volumes of organic corn, wheat, and soy

# Organic Market Strengths in the Plains

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## Regional Totals (2021–2022)

- **Total Certified Organic Acreage:**  
~951,000 acres across the six states
- **Organic Operations:**  
More than 1,400 certified operations across the region
- **Grain & Feed Dominance:**  
All six states report major acreage in wheat, corn, or soybeans, key for organic livestock feed security nationwide

## STRATEGIC IMPORTANCE

- Plains states support the rest of the country's organic livestock systems through **regional feed grain production**, reducing national dependence on imported or coastal grain supply.
- The region's **low population density and agricultural land base** offer expansion capacity not present in other organic-dense regions (e.g., Northeast or West Coast).
- Climate-adapted commodity systems (hay, wheat, soy, buckwheat) provide **resilient alternatives** amid increasing weather volatility and market shifts.

## THE PLAINS BY STATE

### Regional Overview - Chart by State

STATE	CERTIFIED OPERATIONS (2025)	CERTIFIED ACRES (2025)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Colorado	523	261,563	Eggs, cattle, hay	8th in nation for organic acres; 90% of households buy organic
Kansas	196	96,452	Wheat, corn, soybeans	79% of households buy organic
Nebraska	351	261,210	Chicken, corn, soybeans	4th nationally for organic animal sales (\$106M)
North Dakota	165	147,455	Wheat, buckwheat, hay	86% of households buy organic
Oklahoma	85	36,066	Pecans, eggs, wheat	72% of households buy organic
South Dakota	107	148,228	Corn, soybeans, hay	25% of farms plan expansion within 5 years

# Regional Overview – Analysis

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## SIX STATES POWERING ORGANIC GRAINS, LIVESTOCK, AND EXPORT SUPPLY

While often grouped as a single geographic region, each of the Plains states brings distinct strengths to the national organic landscape.

Together, they offer a blend of large-scale grain production, emerging specialty markets, and deep household demand — making the region essential for scaling U.S. organic supply.

### Colorado

Leads the region in organic acreage and farmgate value, with diverse output in livestock, hay, and eggs.

### Nebraska

A livestock powerhouse, ranking 4th nationally in organic animal product sales.

### Kansas, South Dakota, and North Dakota

Form the core of the U.S. organic grain belt, with large-acre, feed-focused systems.

### Oklahoma

While smaller in acreage, shows rapid growth and unique strength in organic pecans

# HIGH OPPORTUNITY CROPS





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## HIGH OPPORTUNITY CROPS | FEEDING THE NATION

# Organic Grains, Livestock & Emerging Specialties

The Plains region is uniquely suited to deliver both volume and versatility in organic production. With robust acreage in staple grains, growing strength in livestock and eggs, and early signals of success in specialty crops, the region offers multiple pathways for high-impact growth.

### Grains & Pulses

The Plains serve as the **core of U.S. organic feed grain production**, with wheat, corn, and soybeans dominating across Kansas, Nebraska, South Dakota, and North Dakota.

- **Kansas and South Dakota** together contribute over **190,000 organic acres** of grains and legumes.
- **Nebraska and North Dakota** are strong in organic corn and buckwheat respectively.
- **Opportunity:** Transition more acres into **rotational legumes** (lentils, chickpeas, dry beans) to support soil health and protein self-sufficiency.



## HIGH OPPORTUNITY CROPS

### Livestock & Eggs

Livestock and egg systems are deeply integrated in Nebraska and Colorado — regions with built-out infrastructure and strong consumer markets.

- **Nebraska** ranks **4th nationally in organic livestock sales** (\$106M annually).
- **Colorado** specializes in organic **eggs and beef**, backed by strong household demand (90% of CO households buy organic).
- **Opportunity:** Expand pasture-based systems into Kansas and South Dakota and grow organic **poultry and egg capacity** in Oklahoma and North Dakota.



## HIGH OPPORTUNITY CROPS

### Specialty & Regional Crops

While known for bulk commodities, the region also offers niche crop potential.

- **Oklahoma** leads in **organic pecan production** — a high-value perennial with export and specialty retail demand.
- **North Dakota** is one of few states reporting certified **organic buckwheat acreage**.
- **Colorado** and **Kansas** have potential to scale **vegetable, herb, and forage systems** for regional buyers.

# High Opportunity Crops – Analysis

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## High Opportunity Crops – Strategic Takeaways

- The Plains offer a **foundational supply of organic feed** and animal products that support national supply chains.
- Each state has opportunity to layer in **higher-value crops** (specialty grains, nuts, produce) to **increase per-acre returns** and attract diversified growers.
- Expansion is best positioned **where existing infrastructure and markets align** — especially along major transportation corridors and near metro demand centers (Denver, Omaha, Wichita, Oklahoma City).



# REGIONAL ONSHORING OPPORTUNITIES



## REGIONAL ONSHORING OPPORTUNITIES

### From Exporter to Engine: Reinvesting Organic Value Within the Plains

The Plains states produce much of the organic grain, livestock feed, and animal products consumed across the country — but relatively little of that value is retained or reinvested regionally. Strategic onshoring of processing, infrastructure, and intra-regional markets can unlock a more resilient, vertically integrated organic system.

#### Why Onshoring Matters:

- Onshoring keeps more value in the region, boosting farmer profitability and rural employment.
- Reduces vulnerability to coastal infrastructure shocks and long-haul logistics costs.
- Positions the Plains as not just a producer, but a processor and market anchor in the national organic economy.

Category	Common Imports	U.S. Import Value	Regional Opportunity	Plains Advantage
Organic Feed Grains	Soybeans, Corn, Feed Mixes	\$300M+ (organic soy imports, est.)	Grain-to-feed pipeline for local poultry / dairy systems	Existing organic grain base + low land costs
Animal Protein Processing	Packaged Eggs, Organic Meat Cuts	\$200M+ (organic meat and eggs, est.)	Invest in mobile / co-op meat and egg processing infrastructure	Livestock concentration in CO, NE, KS; underused capacity
Vegetables and Pulses	Carrots, Dry Beans, Leafy Greens	\$500M+ (fresh & frozen vegetables)	Scale vegetable and pulse production for mid-size buyers	Available acreage and seasonally compatible crops
Institutional Procurement	Fresh produce, dairy, and shelf-stable organics for institutions	N/A – Sourced out-of-region, not internationally	Link producers to local institutions via procurement hubs	High-volume production, strong brand identity, regional logistics

# REGIONAL GENERAL OPPORTUNITIES



## REGIONAL GENERAL OPPORTUNITIES

### Growing Regional Organic Supply: Key Targets

OPPORTUNITY AREA	WHY IT MATTERS
Organic Feed Grains	Core to national organic livestock supply; essential for feed self-sufficiency in dairy and poultry.
Pasture-Based Livestock	Abundant grazing land and climate alignment support low-input, regenerative systems.
Dry Beans & Pulses	High-protein crops that enhance soil health and support rotational systems in arid climates.
Vegetables (Carrots, Potatoes, Greens)	Opportunity to meet year-round institutional and retail demand; compatible with Plains growing seasons.
Nuts (Pecans)	High-value perennial suited to OK's climate; strong retail and export potential.
Specialty Grains (Buckwheat, Oats)	Diversifies farm income; grows well in marginal soils; demand rising for gluten-free and heritage grains.
Eggs & Broilers	Consumer demand growing; Plains states can scale production with existing infrastructure.

# BARRIERS & SOLUTIONS



## BARRIERS & SOLUTIONS

### Challenges to Expanding Plains Organic Supply

BARRIER	POTENTIAL SOLUTION
<b>Limited Processing Infrastructure</b>	Invest in mobile, co-op, and mid-scale facilities for grain, livestock, and vegetable processing.
<b>Fragmented Regional Supply Chains</b>	Create multi-stakeholder co-ops or marketing alliances to aggregate and distribute regional production.
<b>High Cost of Transition to Organic</b>	Expand cost-share and loan programs for transitioning growers; offer targeted agronomic training.
<b>Lack of Technical Support for Dryland Systems</b>	Fund extension and peer-learning programs focused on dryland organic production techniques.
<b>Climate Volatility (Drought, Hail, Wind)</b>	Promote soil-health practices, drought-tolerant crop rotations, and windbreaks.
<b>Underdeveloped Local Markets for Organic</b>	Develop institutional and foodservice channels; launch “Grown in the Plains” marketing efforts to resonate with regional consumers.
<b>Labor Availability and Housing</b>	Support farmworker housing cooperatives and invest in local labor recruitment and retention strategies.

## LOOKING AHEAD

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### The Plains Region: A Strategic Anchor for the Future of Organic

With vast acreage, deep agricultural experience, and strong consumer momentum, the Plains states are poised to lead the next wave of growth in U.S. organic agriculture. Their ability to produce foundational commodities like organic grains and livestock — while expanding into higher-value and climate-resilient systems — positions the region as an indispensable part of the national supply chain.

Targeted investments in infrastructure, technical support, and market development can unlock a more resilient, self-sufficient, and economically robust organic future rooted in the Plains.

PLAINS REGIONAL

#### Feed and Grain Security Starts Here

The Plains hold the key to reducing national dependence on imported organic feed — a foundational step toward stable organic livestock systems.

#### Organic Acreage Can Scale Quickly

With available land and low barriers to expansion, the region is well positioned to lead future acreage growth with the right incentives.

#### Infrastructure Will Multiply Impact

Investments in regional processing, storage, and logistics will increase farmer margins and reduce system-wide friction.

#### Regional Identity Is a Hidden Asset

A “Grown in the Plains” brand can create consumer connection, drive institutional procurement, and keep more value in local economies.



# 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](#) 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.

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THANK YOU  
DISCUSSION

