

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

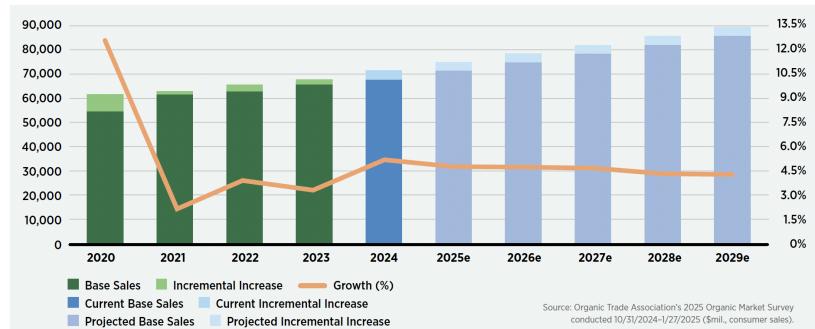
Health Trends GLP-1-driven eating habits are increasing demand for cleaner foods

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



NOVEMBER 2025

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



Source: Organic Trade Association's 2025 Organic Market Survey conducted 10/31/2024-1/27/2025 (\$mill., consumer sales).

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 Plains Organic Advantage

A Practical Guide for Farmers & Producers

The Plains region — spanning **Colorado, Kansas, Nebraska, North Dakota, South Dakota, and Oklahoma** — sits at the core of the nation's organic grain and livestock system.

With nearly a million certified organic acres and deep expertise in feed-focused farming, this region supplies the building blocks that support organic dairies, poultry farms, ranches, and specialty crop markets nationwide. For producers, the Plains offer expansive land availability, strong market demand, and a growing set of opportunities to diversify, transition, and scale organic production.

A Region Built to Feed the Nation

Across the Plains, organic agriculture is grounded in large-scale acreage, climate-adapted cropping systems, and a long history of commodity production. Colorado leads the region in organic acreage, Nebraska's livestock sector ranks among the strongest in the country, and Kansas and South Dakota form the backbone of the U.S. organic grain belt. North Dakota brings unique strength in buckwheat, pulses, and export-oriented crops, while Oklahoma is an emerging force in organic pecans and expanding poultry and egg markets.

Producers across the region benefit from:

- **A vast and scalable land base**, with ~951,000 organic acres across six states
- **National importance in feed grains**, reducing dependence on imported organic corn, soy, and wheat
- **Strong organic household purchasing**, particularly in Colorado and Nebraska
- **Low population density**, enabling growth that many coastal regions cannot accommodate
- **Resilient cropping systems** suited to variable weather — including hay, wheat, soy, and buckwheat

These attributes make the Plains one of the country's most strategically important regions for organic expansion.

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

What the Region Produces — and Where It's Headed

Grains & Pulses: The Foundation of Organic Livestock Systems

Kansas, Nebraska, South Dakota, and North Dakota dominate organic corn, soy, wheat, and small grain acreage — forming the core of the national organic feed supply chain. Kansas and South Dakota alone contribute over 190,000 organic acres of grains and legumes, while Nebraska and North Dakota add strength in organic corn, soybeans, and buckwheat. Opportunities lie in transitioning more acres into rotational legumes such as lentils, chickpeas, and dry beans to improve soil health and regional protein self-sufficiency.

Livestock & Eggs: A High-Value Anchor for the Region

Nebraska ranks 4th nationally in organic livestock sales, generating more than \$106 million annually, while Colorado is a leader in organic beef and eggs backed by strong household demand. Expansion opportunities include increased pasture-based livestock systems in Kansas and South Dakota and growing poultry and egg production in Oklahoma and North Dakota.

Specialty & Regional Crops: Beyond Bulk Commodities

While known for high-acreage staples, the Plains also show rising potential in specialty markets. Oklahoma is a national leader in organic pecans, a high-value perennial crop with export and retail appeal. North Dakota maintains certified organic buckwheat production, and Colorado and Kansas are well positioned to expand organic vegetables, herbs, and forage systems for regional buyers and institutional markets.



Regional Challenges — and Producer-Led Solutions

Across the Plains, producers face similar constraints that define the next phase of regional opportunity:

- **Lack of regional processing and storage**, forcing grain and livestock products to leave the region before adding value
- **Long-haul transportation costs** tied to distance from major markets
- **Infrastructure gaps** for poultry, feed processing, grain cleaning, and value-added production
- **Limited support for transition, technical training, and rotational diversification**

Yet these barriers are also the clearest roadmap forward:

- **Onshore more processing** — from grain cleaning to livestock handling — to keep dollars circulating locally
- **Strengthen storage and logistics** networks that reduce dependence on coastal infrastructure
- **Expand transition support services**, particularly for grain-to-legume rotations and pasture-based livestock
- **Develop intra-regional markets** that shorten supply chains and increase producer margins
- **Build a recognizable regional identity**, such as “Grown in the Plains,” to drive consumer preference and institutional purchasing

Strategic investment in these areas will significantly increase farm profitability and regional resilience.

Looking Ahead: The Plains as a Strategic Anchor for Organic Agriculture

The Plains region is uniquely positioned to lead the next era of organic growth in the United States. With vast acreage, deep agricultural expertise, and the ability to rapidly scale feed and livestock systems, the region underpins the stability of organic supply nationwide. At the same time, rising interest in specialty crops, legumes, nuts, and diversified systems points to a future that is both more resilient and more profitable.

Whether expanding grain rotations, scaling poultry and dairy systems, planting high-value crops, or investing in regional processing, producers in the Plains are shaping a more self-sufficient and economically powerful organic future — one rooted in the strength, scale, and adaptability of the region itself.

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.