SOUTHEAST
TRANSITION TO ORGANIC
PARTNERSHIP PROGRAM

A FARMER'S TOOLKIT | REGIONAL MODULE

SOUTHEAST

NOVEMBER | 2025

Wolf & Associates
THE ORGANIC SPECIALISTS

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TOOLKIT PART 2

SOUTHEAST REGIONAL SNAPSHOT

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Organic Market Strengths in the Southeast

Organic agriculture is gaining momentum across the Southeast, driven by strong consumer interest, favorable growing conditions, and increasing state-level investment. While acreage remains modest compared to other regions, the Southeast's long growing season, diverse microclimates, and deep agricultural heritage position it for sustained expansion. Florida, Georgia, and North Carolina anchor the region's production and sales, supported by growing infrastructure and policy engagement.

SUPPORTING FACTS

- The Southeast includes **more than 500,000 certified organic acres**, with Florida, Georgia, and North Carolina leading in production value.
- **Consumer demand is strong and rising**, particularly in metro areas such as Atlanta, Miami, and Raleigh, where organic outpaces national sales averages.
- The region's **long growing season** and **crop diversity** support both high-value specialty production and large-scale commodity expansion.

Organic Market Strengths in the Southeast

Key Facts:

- **Total Certified Organic Acreage:** ~500,000 acres
- **Annual Combined Organic Sales:** ~$1.2 billion
- **Certified Organic Operations:** ~4,000 farms and processors
- **Top Organic Commodities:** Vegetables, fruit, poultry, eggs, dairy, peanuts, and grains
- **Regional Reach:** Supplies both regional retail chains and national distributors

STRATEGIC IMPORTANCE

The Southeast is emerging as a key growth engine for the U.S. organic sector, with climate and crop diversity unmatched by any other region.
It is:

- A **year-round production hub** capable of supplying winter vegetables and fruit for national markets.
- A **transition-ready region** with extensive conventional acreage suited to organic conversion.
- A **high-demand consumer corridor**, anchored by urban centers and strong retail interest.
- A **resilience model**, with multiple states investing in regenerative and climate-adapted organic systems.

THE SOUTHEAST BY STATE

Regional Overview - Chart by State

STATE	CERTIFIED OPERATIONS (2025)	CERTIFIED ACRES (2025)	TOP ORGANIC COMMODITIES	NOTABLE HIGHLIGHTS
Alabama	34	869	Milk, cattle, tomatoes	71% of households buy organic
Florida	684	51,998	Strawberries, tomatoes, blueberries	Organic farms hire 450% more workers than conventional; 82% of households buy organic
Georgia	336	22,135	Eggs, blueberries, onions	47% of farms plan expansion in next five years
Louisiana	49	6,771	Milk, cattle, rice	73% of households buy organic
Mississippi	28	6,640	Milk, cattle, corn	70% of households buy organic
North Carolina	586	51,063	Chicken, eggs, tobacco	Organic farms hire 120% more workers than conventional; strong livestock and poultry sector
South Carolina	123	6,387	Bell peppers, squash, tomatoes	48% of farms plan expansion over five years

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Regional Overview – Analysis

SEVEN STATES, ONE EMERGING ORGANIC GROWTH CORRIDOR

The Southeast brings together a unique mix of established production systems, expanding markets, and year-round growing potential. From Florida's winter vegetables to Georgia's poultry operations and North Carolina's diversified farms, the region's combination of climate, geography, and consumer access positions it as a critical contributor to future organic supply.

Key Takeaway:
The Southeast's long growing season and strong demand make it a key frontier for U.S. organic expansion—especially in diversified produce, livestock, and rotational systems.

Florida
Strong fruit and vegetable sector; national supplier of winter organics and citrus.

Georgia
Leads in organic poultry and peanuts; growing feed and rotational crop acreage.

North Carolina
Expanding acreage and diversity; strong institutional research and market access.

South Carolina
Emerging vegetable production hub with greenhouse and tunnel investments.

Alabama
Integration of poultry and grains; rising interest in organic certification.

Mississippi & Louisiana
Underdeveloped acreage but strong potential for conversion and value-added systems.

HIGH OPPORTUNITY CROPS

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HIGH OPPORTUNITY CROPS

Produce and Specialty Crops

The Southeast's climate allows year-round production of high-value organic crops that meet both regional and national demand.

CROP	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Vegetables (tomatoes, peppers, cucumbers)	Very High	Strong spring/winter	Year-round potential in FL and GA	Expanding greenhouse and field systems for national distribution.
Berries (blueberries, strawberries)	High	Concentrated in FL and GA	Export potential; limited processing	Growing consumer demand; regional branding opportunities.
Leafy Greens (spinach, kale, lettuce)	High	Moderate	Expanding in NC and SC	Aligns with health and wellness trends; local retail demand.

HIGH OPPORTUNITY CROPS

Grains, Peanuts & Feed Systems

Building organic feed capacity and crop diversity will strengthen the Southeast's livestock and processing sectors.

Crop	Demand	Regional Supply	Notes	Why This Matters / Key Drivers
Feed Grains (corn, soy)	Very High	Undersupplied	Large import dependence	Needed for poultry and dairy systems; strong acreage potential in GA and AL.
Peanuts	Moderate–High	Concentrated in GA	Specialty export crop	High organic market potential; limited certified acreage.
Small Grains (oats, rye, barley)	Rising	Expanding rotational use	Improves soil health and resilience	Supports rotational diversity and feed supply.

HIGH OPPORTUNITY CROPS

Livestock & Value-Added Systems

Poultry and dairy anchor the Southeast’s organic animal sector, supported by growing local and regional demand.

SECTOR	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Poultry & Eggs	Very High	Strong in GA, AL, NC	Large-scale capacity; need for organic feed	Core strength and economic driver across multiple states.
Dairy	Moderate	NC and GA developing	Grass-based and regenerative systems	Local demand growing; complements grain expansion.
Beef & Forage Systems	Moderate	Under development	Suitable grazing systems across region	Opportunity for rotational grazing and carbon farming.

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High Opportunity Crops – Analysis

High Opportunity Crops – Strategic Takeaways

- The Southeast can **supply winter produce** and **bridge national supply gaps** during off-season months.
- **Organic poultry and peanuts** serve as economic anchors for the region.
- Expansion of **organic feed grains and rotational crops** will strengthen system resilience.
- **Protected agriculture and value-added processing** create opportunities for year-round markets and higher farm income.

REGIONAL ONSHORING OPPORTUNITIES

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REGIONAL ONSHORING OPPORTUNITIES

Turning Regional Strengths into Organic Supply Advantages

Key Takeaway:
By onshoring feed, produce, and processing, the Southeast can capture value currently lost to imports and strengthen regional economies.

CATEGORY	COMMON IMPORTS / EXTERNAL SOURCING	U.S. IMPORT VALUE (EST.)	REGIONAL OPPORTUNITY	SOUTHEAST ADVANTAGE
Vegetables and Berries	Mexico, Central America	$2B+	Expand winter and shoulder-season production	Long growing season and proximity to U.S. markets.
Feed Grains & Oilseeds	South America, Canada	$400M+	Develop organic corn and soy systems	Suitable soils, existing conventional base.
Peanuts & Legumes	Limited organic supply	N/A	Grow certified organic peanuts for export; address agronomic challenges	Georgia leads national peanut production.
Poultry & Eggs	Imported feed and co-packing	$200M+	Invest in feed and mid-scale processing	Established poultry infrastructure.
Specialty Crops (Citrus, Herbs)	Imports from Latin America	$150M+	Diversify organic citrus and herb supply	FL and LA suitable for citrus; CEA herbs growing.

REGIONAL GENERAL OPPORTUNITIES

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REGIONAL GENERAL OPPORTUNITIES

Growing Regional Organic Supply: **KEY TARGETS**

OPPORTUNITY AREA	WHY IT MATTERS
Feed Grains & Peanuts	Core to poultry, egg, and dairy resilience; major import substitution potential.
Winter Vegetables & Berries	High-value crops that fill national seasonal gaps.
Poultry & Eggs	Strong existing infrastructure; highest regional farmgate value.
Protected Agriculture (CEA)	Allows year-round supply of leafy greens and herbs.
Transition Land (cotton, tobacco, rice)	Expands organic acreage with strong soil improvement benefits.
Institutional & Retail Markets	Urban demand (Atlanta, Miami, Charlotte) supports growth and branding.

BARRIERS & SOLUTIONS

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BARRIERS & SOLUTIONS

Challenges to Expanding Southeast Organic Supply

Key Takeaway: Infrastructure, technical support, and resilience investment are essential to unlock the Southeast's organic potential.

KEY BARRIER	SOLUTION
Limited organic grain and feed infrastructure	Develop regional feed mills and grain cleaning capacity to serve poultry and dairy sectors
High cost and complexity of certification	Expand technical support, transition cost-share, and peer mentoring
Weather extremes and pest pressure	Invest in resilient systems—cover crops, CEA, and integrated pest management
Labor shortages	Build workforce training programs and incentives for organic specialty crop sectors
Market fragmentation	Support regional marketing cooperatives and multi-state branding initiatives
Limited research and extension	Expand university and USDA partnerships to provide region-specific organic data

LOOKING AHEAD

The Southeast: America's Next Organic Growth Frontier

With its year-round climate, strong consumer base, and growing institutional support, the Southeast is ready to lead a new chapter in organic production.

Strategic investment in infrastructure, feed systems, and regional branding can position the region as a major supplier of both high-volume staples and high-value specialty crops.

Key Takeaway:
The Southeast's organic sector can deliver climate-smart growth and economic resilience while reducing national import dependence.

Year-Round Advantage
Long growing season supports diversified systems.

Infrastructure Opportunity
Feed and processing gaps ready for investment.

Market Proximity
Major metro areas drive reliable, nearby demand.

Transition Momentum
Vast conventional acreage suitable for conversion.

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SUPPLEMENTARY FOCUS ON PUERTO RICO

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Organic Opportunity in the Caribbean Gateway

While not part of the continental Southeast, Puerto Rico represents a key outpost of tropical organic agriculture and a bridge between U.S. and Caribbean markets.

The island's year-round growing conditions and strong consumer demand create fertile ground for organic fruit, vegetable, and coffee systems.

Key Takeaway:
Puerto Rico's diverse tropical crops and proximity to U.S. mainland markets create high-value export potential.

Organic production also supports local food security and farm resilience amid hurricane and supply-chain disruptions.

METRIC	VALUE
Certified Organic Acres	~1,100 acres (USDA NASS, 2021)
Certified Organic Operations	~40
Top Organic Crops	Coffee, plantains, vegetables, herbs
Primary Markets	San Juan metro area, tourism, export niche

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SUPPLEMENTARY FOCUS
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Strategic Opportunities for Puerto Rico

- **Tropical Fruit & Coffee Revitalization:** Support organic certification and processing infrastructure for mangoes, papayas, and coffee.
- **Protected Agriculture:** Expand greenhouse and controlled environment production to stabilize yields and reduce hurricane risk.
- **Local Market Development:** Strengthen distribution to resorts, restaurants, and grocery chains that prioritize "grown in Puerto Rico."
- **Training & Certification Access:** Build local inspection capacity and Spanish-language transition resources through TOPP partners.

CHALLENGE	POTENTIAL SOLUTION
Hurricane and storm vulnerability	Invest in protected ag, drainage, and perennial systems
High input and shipping costs	Promote local composting, input cooperatives, and small-scale processing
Limited certifier presence	Encourage remote inspections and local inspector training
Market access fragmentation	Support aggregation hubs and regional branding

SUPPLEMENTARY FOCUS ON U.S. VIRGIN ISLANDS

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SUPPLEMENTARY FOCUS ON USVI

Organic Production on Small Islands, Big Potential

The U.S. Virgin Islands (St. Croix, St. Thomas, St. John) host a growing number of small-scale organic farms focused on supplying local markets and tourism. While acreage is limited, innovation in protected agriculture and educational programs is driving steady progress.

Key Takeaway:
The USVI's organic farms contribute to local food security and sustainability education, while tapping into a high-value tourism-driven food economy.

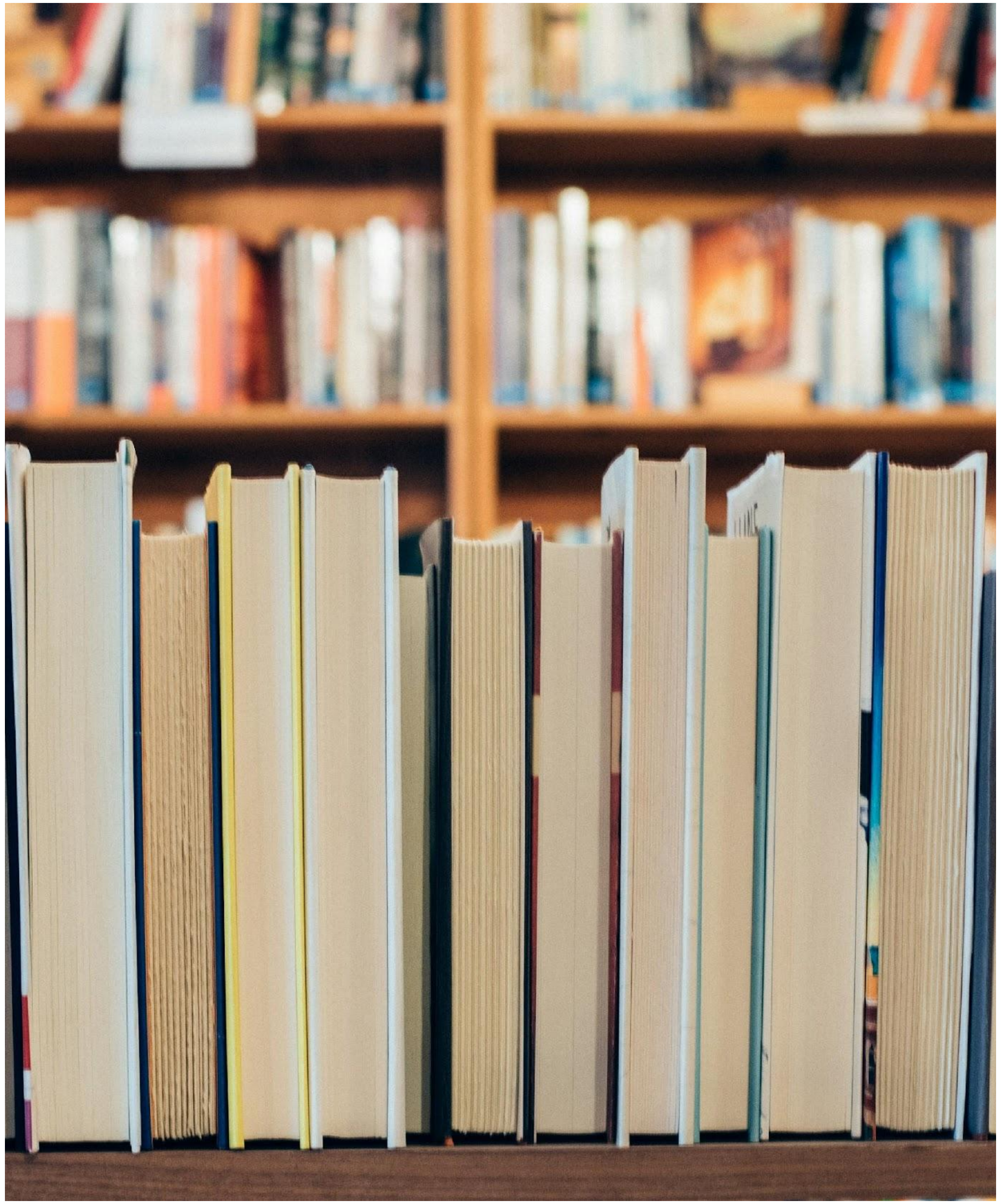
METRIC	VALUE
Certified Organic Acres	~250 acres (USDA NASS, 2021)
Certified Organic Operations	~10
Top Organic Crops	Vegetables, herbs, tropical fruit
Primary Markets	Local retail, tourism, cruise ports, institutional buyers

SUPPLEMENTARY FOCUS ON USVI

Strategic Opportunities for the U.S. Virgin Islands

- **Institutional Partnerships:** Connect organic producers with schools, hotels, and cruise lines to ensure stable local demand.
- **Season Extension:** Expand shaded and hydroponic systems to mitigate drought and saltwater intrusion.
- **Education & Training:** Support ongoing farmer training through partnerships with the University of the Virgin Islands Cooperative Extension Service.
- **Branding & Marketing:** Develop “USVI Organic” or “Island Grown Organic” identity to strengthen local pride and visibility.

CHALLENGE	POTENTIAL SOLUTION
Limited arable land and irrigation	Promote vertical and hydroponic systems
High transport and certification costs	Develop group certification and local inspector pools
Climate stress (heat, drought, storms)	Diversify with perennial and shade-based cropping
Limited access to mainland markets	Focus on local retail, tourism, and cruise sector sales



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 Midwest 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.

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Learn More about the Organic Sector Nationally

USDA NOP Organic Integrity Database
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/

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

The Organic Trade Association creates annually updated fact sheets for each state, detailing the number of organic operations, organic acreage, and other data.

THANK YOU

DISCUSSION

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