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A FARMER'S TOOLKIT | REGIONAL MODULE

SOUTHWEST
TEXAS & NEW MEXICO

NOVEMBER | 2025

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TOOLKIT PART 2

SOUTHWEST | TEXAS & NEW MEXICO REGIONAL SNAPSHOT

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Key Facts and Strategic Importance

ORGANIC MARKET STRENGTHS IN THE SOUTHWEST | TEXAS & NEW MEXICO

The Southwest is an emerging powerhouse for organic production—anchored by Texas's national leadership in dairy and cotton and New Mexico's deep expertise in forage, feed, and arid-region cropping systems. Together, the two states combine scale, innovation, and resilience. Expanding organic acreage here not only strengthens national feed and fiber security but also demonstrates the viability of regenerative, water-smart systems in some of the country's most challenging climates.

- **National Leaders: Texas** ranks #1 in organic milk sales ($320 million) and #4 in organic crops ($179 million); **New Mexico** is a top-five state for organic livestock and forage production.
- **Feed & Fiber Backbone:** The region supplies organic milk, beef, and cotton to national brands while building domestic alternatives to imported feed and fiber.
- **Climate Innovation Hub:** Water-limited conditions drive leadership in regenerative grazing, dryland cropping, and drought-resilient seed systems—positioning the region as a model for organic adaptation in arid zones.
- **Infrastructure & Growth Corridor:** Investment along the Texas–New Mexico corridor (Hereford, Clovis, Las Cruces) is creating new capacity for processing, storage, and regional branding of organic dairy, grain, and cotton.

Organic Market Strengths in the Southwest | Texas and New Mexico

Key Facts:

- **Total Certified Organic Acreage:** ~725,000 acres combined (TX ≈ 550,000 / NM ≈ 175,000)
- **Annual Organic Sales:** Over $525 million in combined crop and livestock value
- **Certified Organic Operations:** ~1,200 farms and businesses across both states
- **Top Organic Commodities:** Milk, beef, cotton, peanuts, hay, and grain crops
- **Regional Infrastructure:** Concentrated dairy and feed hubs around Hereford (TX) and Clovis (NM), with expanding processing and storage capacity
- **Emerging Sectors:** Organic cotton, regenerative grazing, and drought-adapted grains

STRATEGIC IMPORTANCE

The Texas–New Mexico corridor is one of the most strategically valuable organic regions in the nation—combining scale, infrastructure, and climate-smart innovation. It is:

- **A national anchor for organic dairy and beef**, supplying leading processors and retailers with verified, high-integrity animal products.
- **A domestic fiber engine**, with Texas leading the country in organic cotton acreage and potential to meet growing demand for sustainable textiles.
- **A critical feed and forage region**, reducing U.S. reliance on imported organic grain through integrated grain-livestock systems.
- **A climate-resilience laboratory**, where dryland cropping, rotational grazing, and water-efficient systems model the future of organic in arid landscapes.
- **A rural-development driver**, creating jobs and reinvestment in infrastructure from the Texas Panhandle to southern New Mexico.

TEXAS
ORGANIC POWERHOUSE OF THE SOUTH

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REGIONAL OVERVIEW

Texas – Organic Powerhouse of the South

Overview

Texas is the largest organic state in the South and one of the most influential nationwide. Its scale, climate diversity, and agricultural heritage position it as a national leader in organic dairy, livestock, and field crops. From the High Plains to the Hill Country, organic systems here feed both domestic and export markets.

KEY METRICS (2025)	
Certified Operations	1,021
Certified Acres	568,678 (3rd largest in U.S.)
Top Organic Commodities	Milk • Cattle • Cotton
Split Operations	49 % of organic farms
National Rank	#1 in organic milk ($320 M farmgate) #4 in organic crops ($179 M farmgate)
Household Participation	92 % of U.S. households buy organic; Texas mirrors national trend

Note: Certain statistics may be based on 2021 production data.

Regional Overview

Key Takeaway:
Texas anchors the organic South — vast, diversified, and commercially mature. Its mix of rangeland dairy, high-value fiber, and field crops positions the state as a cornerstone for scaling certified organic supply and demonstrating climate-smart resilience at scale.

Highlights

- Texas organic milk leads the nation, driven by expansive pasture-based dairies and vertically integrated supply chains.
- Organic cotton acreage is rebounding, supported by regenerative partnerships and textile traceability initiatives.
- Feed grain and livestock coordination programs are emerging to reduce dependence on imported organic corn and soy.
- Nearly half of organic farms operate hybrid systems, balancing organic and conventional acres to manage risk.
- Expanding consumer demand in Austin, Dallas, and Houston fuels direct-market and regional processing growth.

NEW MEXICO
INNOVATION AND INTEGRITY IN ARID-LAND ORGANICS

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REGIONAL OVERVIEW

New Mexico – Innovation and Integrity in Arid-Land Organics

Overview

New Mexico blends traditional stewardship with modern organic innovation. Its producers lead in desert-adapted dairy, grass-fed livestock, and low-water field crops, creating a model for organic systems under increasing climate stress.

KEY METRICS (2025)	
Certified Operations	99
Certified Acres	40,721
Top Organic Commodities	Milk • Cattle • Corn
Split Operations	37 % of organic farms
National Rank	#8 in organic milk ($66 M farmgate sales in 2021)
Growth Outlook	30 % of farms plan production expansion within 5 years

Note: Certain statistics may be based on 2021 production data.

Regional Overview

Key Takeaway:
New Mexico exemplifies climate-resilient organic production — lean, innovative, and deeply place-based. With continued investment in water efficiency, on-farm diversification, and cooperative marketing, the state can grow its role as a model for organic success in arid landscapes.

Highlights

- Organic dairies in the southern and eastern plains anchor a high-value export milk market that serves regional processors.
- Livestock operations integrate arid-rangeland management and regenerative grazing, reducing inputs and protecting watersheds.
- Expanding interest in organic corn and forage crops supports feed autonomy and soil-carbon retention.
- Strong cross-border trade ties link New Mexico producers to Arizona and Texas organic supply chains.
- Culturally rooted small-scale farms near Albuquerque and Taos are reviving traditional acequia-based organic systems.

HIGH OPPORTUNITY CROPS
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High Opportunity Crops: Texas

Building a National Engine for Organic Feed, and Livestock

Texas' vast acreage and diverse production zones make it a national leader in organic milk, beef, cotton, and rotational crops. The state's broadacre systems and integrated livestock operations create opportunities to scale both staple commodities and regenerative value chains.

Key Takeaway:
Texas is the backbone of U.S. organic feed and fiber. Expanding processing and regenerative systems can transform its scale into sustainable, high-value regional advantage.

CROP / SECTOR	DEMAND	REGIONAL SUPPLY	OPPORTUNITY	WHY IT MATTERS / KEY DRIVERS
Livestock Systems (dairy, beef, poultry)	Very High	Good statewide infrastructure	Integrate regenerative grazing and feed self-sufficiency; expand processing infrastructure	High national demand; reduces carbon footprint and input costs.
Peanuts (Central and Panhandle)	High	Moderate acreage; growing demand	Increase certified acreage and organic shelling capacity	Organic peanut butter and snack markets growing >10% annually.
Feed Grains (corn, milo, soy)	Very High	Undersupplied	Build organic feed pipelines for TX dairy and poultry	Supports livestock systems and reduces reliance on imported feed.
Rotational Row Crops (sorghum, millet, legumes)	Rising	Limited	Develop dryland rotations to boost soil health and resilience	Enhances drought tolerance and provides nitrogen for feed systems.
Organic Cotton (West TX)	Very High	Strong acreage base; limited processing capacity	Expand organic procesing, marketing, and domestic textile links	U.S. cotton brands and retailers are seeking verified domestic fiber sources.

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High Opportunity Crops: New Mexico

Scaling Organic Innovation in Dryland & Arid-Adapted Systems

New Mexico's organic sector is smaller in acreage but rich in innovation—combining feed and forage production with unique regional crops like chile, legumes, and dryland corn. Its dairies and grain systems are central to the Southwest's organic supply chain.

Key Takeaway:
New Mexico's innovation in dryland cropping, forage systems, and high-value specialty crops positions it as a model for organic adaptation and regional food sovereignty.

CROP / SECTOR	DEMAND	REGIONAL SUPPLY	OPPORTUNITY	WHY IT MATTERS / KEY DRIVERS
Forage & Feed Crops	Very High	Strong in dairy corridor	Expand acreage near Clovis and Portales	Supports regional dairy and beef operations; stabilizes feed costs.
Dryland Corn & Sorghum	High	Moderate acreage	Scale drought-tolerant varieties and rotational systems	Core to arid-region organic production; compatible with low-input systems.
Arid-Adapted Legumes (chickpeas, lentils)	Moderate	Emerging	Pilot rotational legumes for soil restoration and protein markets	Diversifies cropping systems while improving nitrogen balance.
Regional Grains (wheat, barley)	Moderate	Niche-scale	Build value-added processing (mills, storage)	Links producers with artisan food and brewing markets.
Chiles and Specialty Crops	High	Strong regional identity	Increase certified acreage and value-added sauces	Symbol of NM agriculture; strong export and retail recognition.

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REGIONAL ONSHORING OPPORTUNITIES

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REGIONAL ONSHORING OPPORTUNITIES

Several of the Southwest's core crops align with national import - reduction goals.

By investing in regionally adapted production systems and infrastructure, Texas and New Mexico can help replace foreign-sourced inputs with high-integrity domestic supply.

PRODUCT CATEGORY	CURRENT IMPORTS	SOUTHWEST ADVANTAGE
Organic Cotton	South Asia, Turkey	TX leads U.S. production with growing demand
Animal Feed	Midwest or imports	Regional alfalfa, corn, and hay
Dry Beans & Grains	Midwest or Latin America	Arid-region varieties adapted to NM/TX
Spices (e.g., chile)	Imported from Asia	Local heritage varieties in NM, TX borderlands

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REGIONAL GENERAL OPPORTUNITIES

Growing Regional Organic Supply: KEY TARGETS

Key Takeaway:
Targeted investment in feed, fiber, and water-resilient systems will secure the Southwest's role as a national leader in organic dairy, livestock, and climate-smart agriculture.

OPPORTUNITY AREA	WHY IT MATTERS
Feed and Forage Systems	The backbone of regional dairy and livestock; expanding organic grains and forage reduces dependence on imported feed.
Cotton and Fiber Crops	Texas leads the nation in organic cotton acreage; increased ginning and processing capacity supports domestic textile markets.
Water-Resilient Agriculture	Drought-adapted seed, regenerative grazing, and cover cropping strengthen climate resilience and soil health.
Dairy and Livestock Processing	Mid-scale facilities near Hereford (TX) and Clovis (NM) can anchor regional value chains and rural job creation.
Broadacre and Row Crops	Scaling organic grain and peanut production diversifies income and supports rotation systems.
Cold Storage and Grain Handling	New infrastructure for grain cleaning and temperature-controlled storage extends product quality and market reach.
Workforce and Technical Capacity	Training and apprenticeships build a skilled organic labor force ready for processing, production, and marketing roles.

BARRIERS & SOLUTIONS

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BARRIERS & SOLUTIONS

Challenges to Expanding Texas and New Mexico Organic Supply

Key Takeaways:
Strategic investment in water efficiency, infrastructure, and arid-region innovation can turn the Southwest's toughest challenges into long-term advantages —building a resilient, high-value organic economy rooted in adaptation and resource stewardship.

CHALLENGE	POTENTIAL SOLUTION
Drought & Water Scarcity	Organic dryland techniques, efficient irrigation tech
Land access for small/medium producers	Lease-to-own, cooperative land models
Infrastructure gaps	Investment in cotton, grain, and dairy processing
Climate adaptation needs	Research in arid-region organic systems

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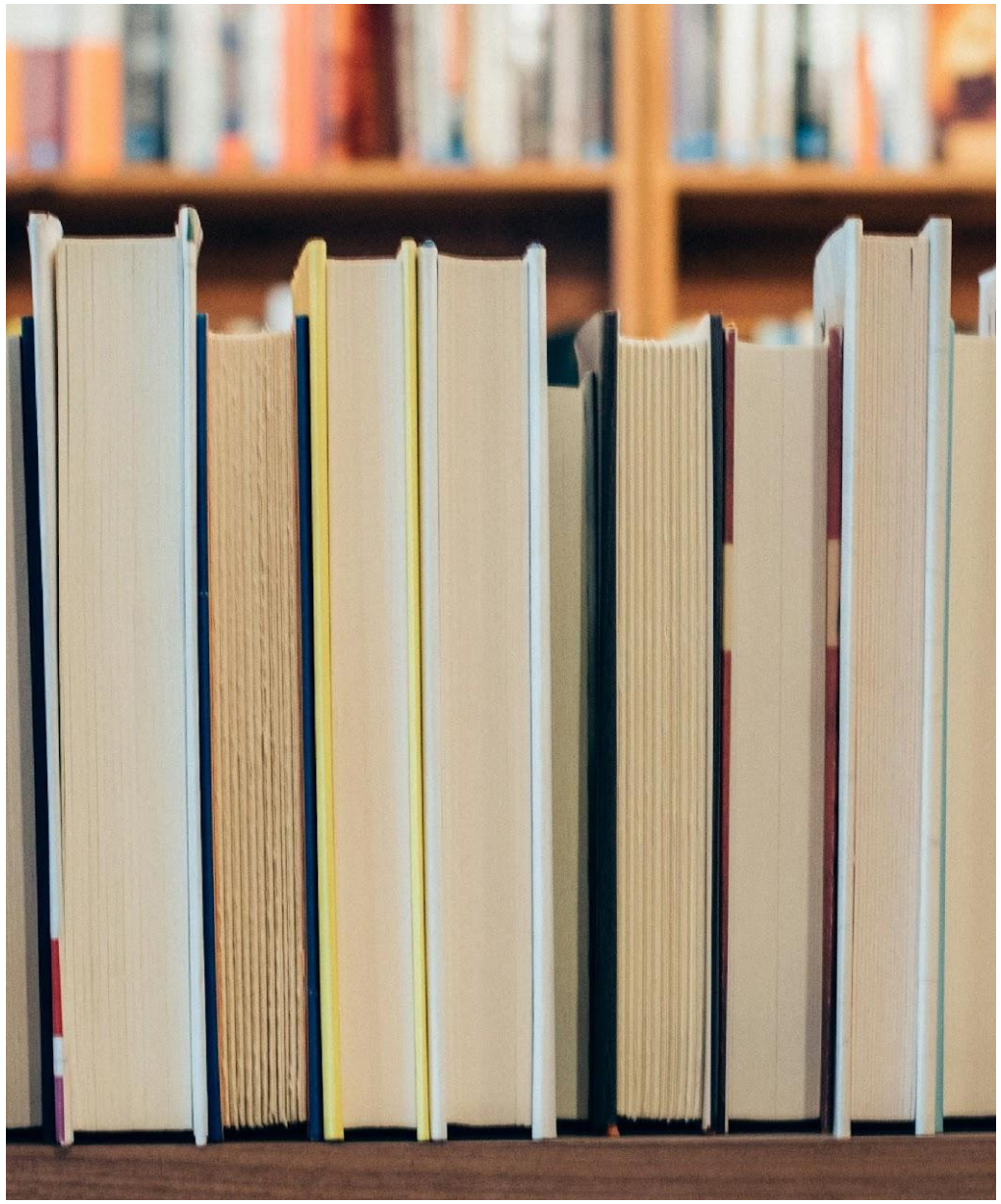
LOOKING AHEAD

Organic sales in the U.S. reached $71.6 billion in 2024, growing at twice the rate of conventional food.

The Southwest is positioned to:

- Lead in animal-based organic systems
- Support domestic fiber sovereignty
- Anchor dryland innovation and arid-region resilience
- Scale acreage to meet long-term demand in both commodity and specialty organic sectors



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://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.

- Texas Organic Agriculture: Expanding from Farm to Market – Texas A&M AgriLife Organic

THANK YOU

DISCUSSION

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