

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

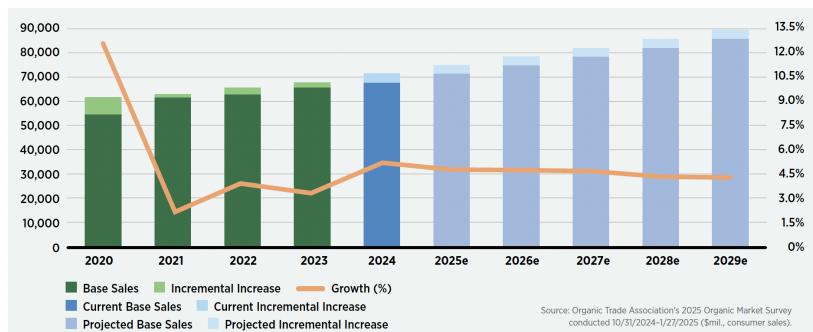
Health Trends GLP-1-driven eating habits are increasing demand for cleaner foods

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



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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 Southeast Organic Advantage

A Practical Guide for Farmers & Producers

Organic agriculture in the Southeast is gaining steady ground, propelled by strong consumer demand, a year-round growing climate, and a diverse agricultural heritage. While organic acreage is still expanding relative to other regions, the Southeast's long growing season, crop diversity, and expanding infrastructure make it one of the most promising organic growth frontiers in the United States. **Florida, Georgia, and North Carolina** anchor the

region's production and sales, supported by strong retail markets in Atlanta, Miami, Charlotte, and Raleigh. For producers, this region offers unmatched climatic potential and a clear runway for scaling organic systems.

A Region Defined by Climate Advantage, Market Access & Growth Potential

Across the Southeast, organic production benefits from favorable temperatures, multiple cropping windows, and proximity to major consumer hubs. The region includes more than 500,000 certified organic acres, with ~4,000 certified farms and processors contributing nearly \$1.2 billion in annual organic sales. Florida's winter vegetables, Georgia's poultry and peanuts, and North Carolina's diversified farms underscore the region's broad agricultural base and mounting momentum behind organic transition.

Producers benefit from:

A uniquely long growing season, enabling year-round production for regional and national markets.

- **Expanding consumer demand**, particularly in metro centers outpacing national organic sales trends
- **Diverse crops and microclimates**, allowing both staple commodities and high-value specialty products
- **Emerging infrastructure**, including greenhouses, high tunnels, feed systems, and regional processing
- **Ample conventional acreage ready for conversion**, creating major potential for rapid acreage growth

Collectively, the Southeast offers a rare combination of climatic advantage and market access that positions it as a future leader in U.S. organic supply.

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

What the Region Produces — and Where It's Headed



Produce & Specialty Crops: Year-Round Market Advantage

The Southeast's climate supports continuous or extended-season production of high-value crops. Florida excels in winter vegetables and fruit, helping bridge seasonal supply gaps for national distribution. North Carolina and South Carolina are expanding protected agriculture and diversified vegetable systems to serve both regional retailers and local markets. Across the region, producers are shifting toward berries, tomatoes, leafy greens, herbs, and other specialty crops that command strong premiums and fit well with the climate.

Grains, Peanuts & Feed Systems: Building Regional Self-Sufficiency

Georgia remains a national leader in organic peanuts, supported by growing rotational crop capacity. Expanding organic grains — particularly feed grains — is a top priority for strengthening the region's poultry and livestock sectors. Alabama and Mississippi are developing integrated poultry–grain systems, while North Carolina's emerging grain and feed infrastructure supports expanding livestock markets and reduces reliance on imported organic grain.

Livestock & Value-Added Systems: Anchors of Regional Production

Poultry is the dominant organic animal sector in the region, especially in Georgia and Arkansas-adjacent supply chains. Dairy, eggs, and grass-fed livestock systems are growing across North Carolina, Tennessee, and Alabama, supported by rising consumer demand and expanding regional processors. Value-added opportunities — from pasture-based dairy to on-farm processing — are becoming more accessible as states invest in regional infrastructure.

Looking Ahead: The Southeast as America's Next Organic Growth Frontier

With its year-round climate, high-demand consumer corridor, and increasing institutional support, the Southeast is positioned to become a major engine for U.S. organic agriculture. Expansion of feed grains, protected agriculture, and diversified specialty crops will reduce national import dependence and strengthen local economies. The region's combination of climate-smart potential, large-scale conversion opportunities, and strong urban markets make it uniquely equipped to scale both high-volume staples and premium specialty crops.

Whether producing winter vegetables, scaling organic poultry, expanding peanuts and rotational crops, or investing in protected agriculture and feed infrastructure, Southeast producers are on the forefront of building a resilient, profitable organic future rooted in regional strengths and year-round production potential.

Regional Challenges — and Producer-Led Solutions

The Southeast's opportunities are closely tied to addressing several structural challenges:

- **Insufficient feed and processing infrastructure**, which limits poultry and livestock expansion
- **Climate challenges**, including heat, humidity, and hurricanes — requiring resilient production systems
- **Labor shortages**, especially in high-intensity specialty crop sectors
- **Limited regional supply chains**, resulting in dependence on outside markets for grain, feed, and processing

Across the region, producers and partners are advancing targeted solutions:

- **Onshore feed production and processing** to reduce reliance on imported grains and lower production costs
- **Expand protected agriculture**, including greenhouses and tunnels, to protect crops, extend seasons, and stabilize yields
- **Invest in value-added processing**, including dairy, poultry, and produce facilities that keep more value in the region
- **Support transition and certification**, especially for large tracts of conventional row-crop land well-suited for organic conversion
- **Build regional brands** linking "Southeast Grown" organics to strong local consumer identity and year-round markets

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

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.