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A FARMER'S TOOLKIT | REGIONAL MODULE

WEST

NOVEMBER | 2025

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TOOLKIT PART 2

WEST REGIONAL SNAPSHOT

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Key Facts and Strategic Importance

ORGANIC MARKET STRENGTHS IN THE WEST

The Western region anchors the U.S. organic economy, led by California's unmatched scale and complemented by the climate diversity and innovation of Arizona, Nevada, Utah, and Hawai'i. The region produces more than a quarter of all U.S. organic acreage and over half of total national sales. It is a hub for fruits, vegetables, dairy, eggs, and dryland grains—and a proving ground for water-resilient, climate-adapted organic systems.

Scale & Leadership: California alone accounts for 1.84 million organic acres and over $14 billion in annual organic sales.

Regional Balance: Arizona, Nevada, and Utah add 587,000 more acres, supplying feed, forage, and winter vegetables to national markets.

Diverse Production Systems: From coastal orchards to desert grains and alpine dairies, the West produces both high-value crops and foundational commodities.

Climate Innovation: The region leads in water conservation, drought-adapted systems, and regenerative soil health—defining the future of organic adaptation.

Organic Market Strengths in the West

Key Facts:

- **Total Certified Organic Acreage:**
  ~2.53 million acres
- **Certified Organic Operations:**
  ~6,150
- **Annual Organic Sales:**
  Over $15 billion combined
- **Top Sectors:**
  Fruits, vegetables, dairy, poultry, grains, and forage
- **National Role:**
  Supplies 70% of U.S. organic fruits and vegetables and a large share of feed and forage for dairy and livestock systems

STRATEGIC IMPORTANCE

The West defines the scale and direction of U.S. organic agriculture.

It is:

- **A global benchmark for organic production and policy**, setting standards for transparency, environmental stewardship, and innovation.
- **A supply-chain engine**, feeding both national and export markets while supporting thousands of rural jobs.
- **A climate-resilience laboratory**, advancing water efficiency, regenerative practices, and circular nutrient systems.
- **A regional ecosystem of leadership**, connecting farmers, research institutions, and policymakers in a uniquely integrated organic economy.

THE WEST
BY STATE

Regional Overview - Chart by State

State	Certified Operations (2025)	Certified Acres (2025)	Top Organic Commodities	Notable Highlights
Arizona	296	37,482	Lettuce, broccoli, celery	Key U.S. winter produce hub; organic farms hire 7x more workers than conventional
California	5,418	1,839,458	Chickens, strawberries, grapes	#1 in operations and acres; 74% of counties are organic hotspots
Hawaii	116	100,185	Lettuce, macadamias, coffee	Over 100,000 certified organic acres; export crops and food security focus
Nevada	121	411,523	Hay, eggs, barley	5th in U.S. for organic acres; expanding feed and rangeland systems
Utah	198	137,922	Eggs, wheat, milk	55% split operations; growing organic grain and dairy clusters

Regional Overview – Analysis

FOUR STATES DRIVING U.S. ORGANIC GROWTH THROUGH SCALE, CLIMATE INNOVATION, AND DIVERSITY

The West stands apart as the country's dominant organic region—combining the volume and market leadership of California with the adaptive innovation of its neighboring states. This region's capacity for both export-oriented specialty crops and climate-resilient feed systems makes it essential to national food security and sustainability.

Key Takeaway:
Together, these states form the foundation of the U.S. organic sector—linking large-scale production with environmental leadership and continuous innovation.

California
Leads the nation in organic acreage, sales, and diversity; produces 70% of U.S. organic fruits and vegetables.

Arizona
A critical winter produce hub and innovation center for water-efficient systems.

Nevada
A rapidly growing producer of organic hay and forage, with large-scale rangeland potential.

Utah
Home to expanding organic dairy and grain systems; well positioned for rotational diversity and feed self-sufficiency.

HIGH OPPORTUNITY CROPS

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HIGH OPPORTUNITY CROPS IN THE WEST

HIGH OPPORTUNITY CROPS CALIFORNIA

National Epicenter of Organic Fruits, Vegetables, and Dairy

California anchors the nation's organic fruit, vegetable, and livestock systems.

The state's scale, climate, and infrastructure support everything from small farms to vertically integrated organic enterprises.

CROP / SECTOR	DEMAND	REGIONAL SUPPLY	OPPORTUNITY	WHY IT MATTERS / KEY DRIVERS
Vegetables (leafy greens, lettuce, celery)	Very High	Strong, year-round	Expand CEA and regional diversification	National fresh-market supply driver; global export demand.
Tree Fruit & Vine Crops (grapes, citrus, almonds)	Very High	Mature, diverse	Invest in regenerative orchard systems	Long-term soil health and export stability.
Berries (strawberries, blueberries)	Very High	Concentrated on coast	Extend season and acreage inland	Nationally leading category; major retail driver.
Dairy & Livestock	High	Strong in Central Valley	Enhance feed self-sufficiency and local processing	Maintains California's dominance in organic milk and cheese.

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HIGH OPPORTUNITY CROPS IN THE WEST

HIGH OPPORTUNITY CROPS ARIZONA AND NEVADA

Desert Efficiency Meets Forage Expansion

Arizona and Nevada are redefining organic agriculture in arid and semi-arid systems.

Both states are scaling production through innovation in irrigation, rotation, and regenerative feed systems.

Crop / Sector	Demand	Regional Supply	Opportunity	Why It Matters Key Drivers
Leafy Greens and Winter Vegetables (AZ)	Very High	Strong	Expand winter production and cold-chain logistics	Fills national seasonal gaps; employs 700% more workers than conventional.
Forage and Hay (NV)	High	Expanding	Scale certified rangeland and feed systems	Supports regional dairy and beef; strengthens feed self-sufficiency.
Grains (barley, wheat, corn)	Moderate	Growing	Increase rotation acreage for resilience	Boosts soil health and supports livestock markets.
Poultry and Eggs	High	Limited	Develop mid-scale poultry operations in both states	Diversifies farm income and leverages existing feed networks.

HIGH OPPORTUNITY CROPS IN THE WEST

HIGH OPPORTUNITY CROPS UTAH

Scaling Dairy, Grain, and Regenerative Crop Systems

Utah's growing organic economy blends livestock and grains with high-mountain innovation and mixed-system production.

CROP	DEMAND	REGIONAL SUPPLY	NOTES	WHY THIS MATTERS / KEY DRIVERS
Dairy & Forage Systems	High	Expanding	Build feed autonomy through regional grain integration	Supports local processing and feed stability.
Small Grains (wheat, barley)	Rising	Strong base	Develop regional marketing for identity-preserved grains	Growing demand from artisan and specialty processors.
Eggs & Poultry	High	Limited	Support mid-scale organic poultry clusters	Complements dairy systems and provides rotational value.
Mixed Crop Systems (legumes, cover crops)	Emerging	Pilot projects	Promote regenerative rotations	Improves soil health and water retention.

High Opportunity Crops – Analysis

Strategic Takeaways

- The West combines **mature fruit and vegetable systems** with **emerging feed and forage expansion** across arid states.
- **California anchors scale and exports**, while **Arizona, Nevada, and Utah** build adaptive capacity in feed and rotational systems.
- **Water resilience and regenerative practices** are the shared growth drivers across the region.
- Investments in **cold-chain, feed infrastructure, and local processing** will strengthen the West's regional and national supply role.

From coast to desert, the West demonstrates that climate-smart adaptation and large-scale production can coexist—and lead the future of U.S. organic agriculture.

REGIONAL ONSHORING OPPORTUNITIES

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REGIONAL ONSHORING OPPORTUNITIES

Key Takeaways:
Reinvesting in local processing, composting, and feed infrastructure will enhance economic resilience and keep organic value in-region.

Category	Current Imports / Gaps	Opportunity	Regional Advantage
Organic Fruits and Vegetables	Imports from Mexico and South America	Expand CEA and winter production	Established infrastructure; retail demand leadership.
Feed & Forage	Imports from Midwest and Canada	Scale dryland grains and rangeland organics	Large acreage base in NV and UT.
Dairy Processing	Centralized out-of-state bottling	Build mid-size creameries in CA and UT	High production volumes; strong branding opportunities.
Composting and Nutrient Recovery	Limited regional systems	Develop integrated compost and circular economy programs	High waste volume; state policy support (CA, AZ).

REGIONAL GENERAL OPPORTUNITIES

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REGIONAL GENERAL OPPORTUNITIES

Growing Regional Organic Supply: KEY TARGETS

Opportunity Area	Why It Matters
Fruits & Vegetables	California and Arizona feed national markets; expanding inland production diversifies supply and labor.
Feed & Forage Systems	Nevada and Utah can reduce dependence on imported feed by scaling hay and rotational grains.
Water-Resilient Agriculture	Drought-adapted systems improve stability and soil health across the West.
Composting & Soil Health Infrastructure	Critical for nutrient recycling and regenerative scaling.
Dairy & Livestock Processing	Expanding local bottling and co-packing adds value and jobs.
Protected Agriculture & CEA	Year-round systems enhance local sourcing and reduce imports.
Research & Extension	Universities across the region drive climate-smart organic innovation.

BARRIERS & SOLUTIONS

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BARRIERS & SOLUTIONS

Challenges to Expanding West Organic Supply

Key Takeaway:
The West's leadership depends on investment in water resilience, labor, and infrastructure—turning scale into sustainability.

Challenge	Potential Solution
Water scarcity and drought	Invest in irrigation efficiency, dryland systems, and soil moisture retention
Land access and affordability	Support land trust and cooperative ownership models
Labor shortages	Expand workforce training, housing, and visa programs
Limited mid-tier infrastructure	Build mid-size processing, storage, and distribution hubs
Rising input costs	Increase regional composting and cooperative input 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 the overall food market.

The West will remain central to this expansion — combining California's scale with interior-state innovation and resilience.

THE WEST IS POISED TO:

- Lead the nation in climate-adapted fruit, vegetable, and dairy systems
- Expand organic feed and rotational grains for livestock self-sufficiency
- Drive national composting, circular economy, and regenerative research initiatives
- Strengthen regional and global market resilience

Key Takeaway: The West's combination of scale, innovation, and adaptation ensures its enduring role as the epicenter of U.S. organic agriculture.

HAWAII SUPPLEMENT

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ORGANIC MARKET STRENGTHS IN HAWAII

Summary

Organic agriculture in Hawaii reflects a deep connection between cultural heritage and environmental stewardship. The state's tropical climate, regenerative farming leadership, and export potential make it a vital component of the Western organic region.

Supporting Facts

- **Certified Organic Acres:** ~100,000 (2025 OTA data)
- **Certified Operations:** 116
- **Annual Sales:** $17.5 million
- **Top Crops:** Macadamias, coffee, vegetables, tropical fruit, canoe crops (taro, breadfruit, coconut).

Key Takeaways:

Hawai'i bridges tradition and innovation—its tropical systems provide national leadership in regenerative and culturally rooted organic production.

HAWAII SUPPLEMENT

The Hawaii Organic Economy by the Numbers

Key Takeaway:
Hawaii's organic footprint is small in acreage but large in impact—driving innovation, education, and export value across the Pacific.

METRIC	VALUE
Certified Organic Acres	100,185
Certified Organic Operations	116
Top Organic Commodities	Lettuce, macadamias, coffee
Organic Sales (2025 est.)	$17.5 million
Regional Share	4% of Western regional organic acreage

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HAWAII SUPPLEMENT

High Opportunity Crops: Hawaii

Key Takeaway:
Hawaii's tropical diversity and Indigenous knowledge make it a living model for regenerative, place-based organic agriculture.

CROP / SECTOR	DEMAND	REGIONAL SUPPLY	OPPORTUNITY	WHY IT MATTERS / KEY DRIVERS
Coffee & Macadamias	High	Strong	Enhance certification and export branding	Global recognition; sustainable tropical systems.
Vegetables & Greens	Rising	Growing CEA sector	Scale controlled environment and high-tunnel systems	Reduces imports and supports local markets.
Canoe Crops (taro, breadfruit, coconut)	Moderate	Expanding	Invest in Indigenous and regenerative production	Connects food security with cultural revitalization.
Fruit (papaya, banana, pineapple)	High	Limited	Develop regional aggregation and processing	High-value tourism and export markets.

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HAWAII SUPPLEMENT

Challenges to Expanding Hawaii Organic Supply

Key Takeaway:
Addressing logistical and infrastructure barriers will unlock Hawaii's full potential as a global leader in tropical organic systems.

CHALLENGE	POTENTIAL SOLUTION
High input and shipping costs	Local composting, regional input production
Limited land and infrastructure	Cooperative aggregation and small-scale processing
Pest pressure and invasive species	Tropical IPM and research investment
Certifier access	Local inspector training and group certification

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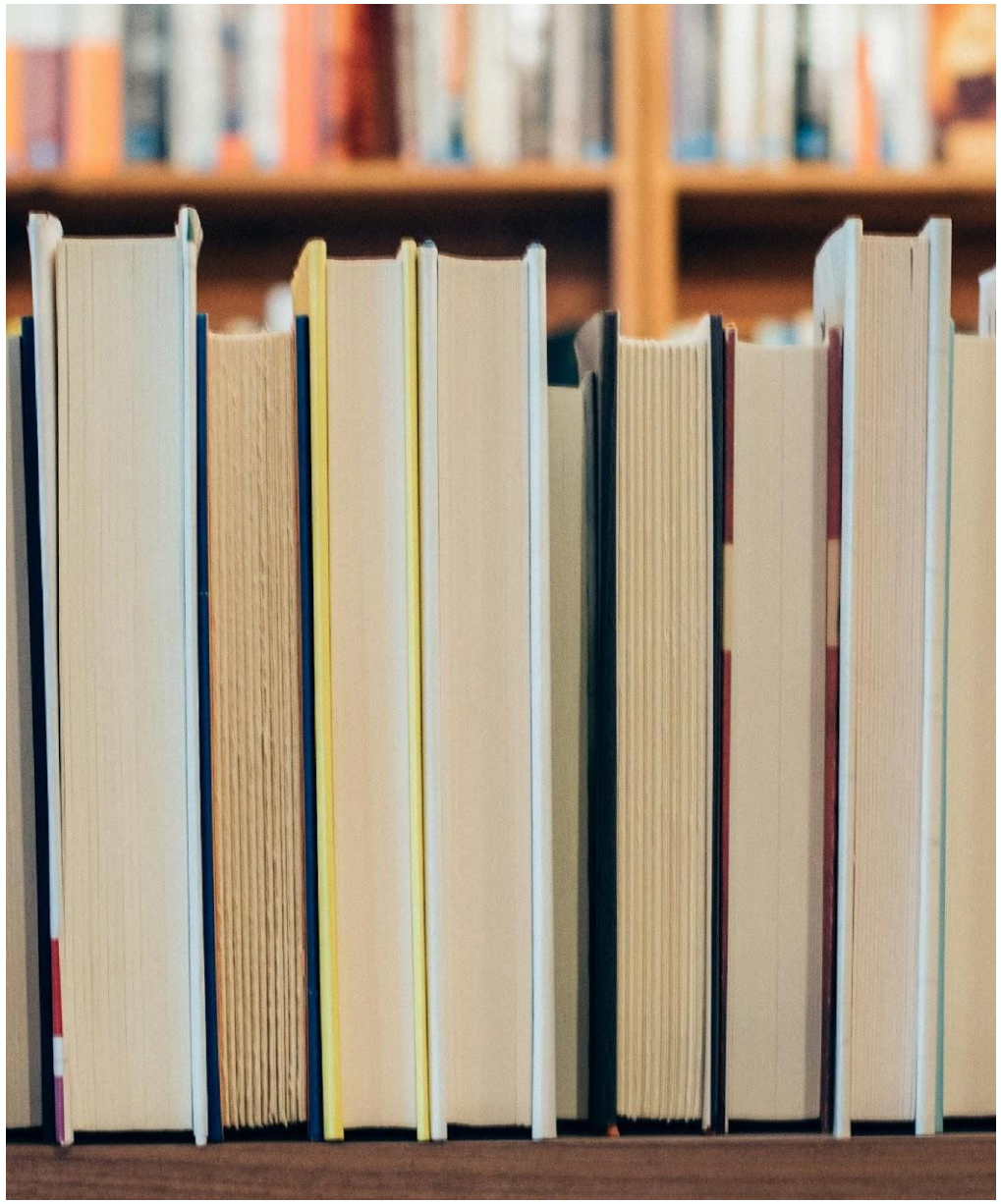
LOOKING AHEAD

Hawaii's organic future lies at the intersection of tradition and innovation.

With regenerative systems, tropical climate advantages, and strong educational leadership, the state can shape national and global models for sustainable agriculture.

Key Takeaway:
Addressing logistical and infrastructure barriers will unlock Hawaii's full potential as a global leader in tropical organic systems.



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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