



STATE *of* ORGANIC PRODUCE 2023

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13



53



61

Contents

Welcome 5

Sales and Performance Overview 7

- Conventional vs. Organic
- Regional Organic Performance
- Top 10 Organic Categories
- Year-Over-Year Change in Weekly Sales

Leading Category Performers 13

Berries	Potatoes	Broccoli
Packaged Salads	Tomatoes	Bell Peppers
Apples	Citrus	Cucumbers
Herbs & Spices	Grapes	Celery
Carrots	Avocados	Squash
Bananas	Mushrooms	Kale
Lettuce	Onions	

Retailer & Wholesaler Snapshots 53

Hot-Button Issues 57

2023 Events 61

- Organic Produce Summit
- Organic Grower Summit

Trade Organizations & Associations 67

- Organic Farming Research Foundation (OFRF)
- Rodale Institute
- California Certified Organic Farmers (CCOF)



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Welcome

Sure, 2023 sales of organic fresh produce were slower than in previous years, but there's no denying that consumers see the benefit of organic fruits and vegetables. Retail sales topped a record \$9.6 billion last year, and the future of organic fresh produce remains very positive. The proof is in the pudding: As supermarkets increase organic assortment, expand shelf sets, and improve the visibility of organics at the retail level, consumer purchases will continue to grow. And while hot—and sometimes contentious—issues related to technology, regenerative agriculture, food safety, and inflation drove robust dialogue and debate among growers and retailers, the organic community at large rallied around the overarching of values that continue to ensure this industry blossoms: transparency, health, and environmentalism.

Once again, we want to thank all of those who have been a part of making the Organic Produce Network an effective vehicle for sharing news and information about the organic fresh produce industry.

To a fruitful 2024,
The OPN Team



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A woman with long brown hair, wearing a light-colored cardigan over a white shirt, is smiling as she pushes a shopping cart through a grocery store's produce section. The cart is filled with various fresh items, including a bottle of orange juice, a watermelon, a bunch of green leafy vegetables, several bunches of yellow bananas, a large pineapple, a cantaloupe, and several red and yellow bell peppers. In the background, there are more produce bins filled with lemons and other fruits, and the store's interior is brightly lit.

Sales and Performance Overview



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US Organic Produce Sales Top \$9.6 Billion in 2023, Up 1.6% from Prior Year



All data & information provided exclusively by Category Partners



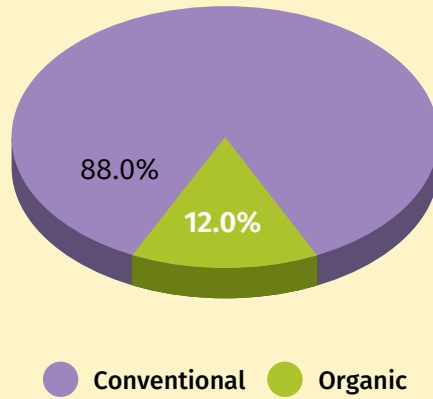
Topping \$9.6 billion, organic fresh produce sales in the US grew by 1.6% in 2023, while volume declined by -0.1%. Conventional produce showed a similar trend, with a year-over-year sales increase of 1.9% and nearly flat volume growth of 0.1%. Repeating its percentage shares of the prior two years, organic produce made up 12% of all retail produce sales and accounted for 7% of total produce volume in 2023.

Working again with Category Partners, Organic Produce Network has created an annual report highlighting 20 of the leading category performers in organic produce, which will be explored individually later on. This *Sales and Performance Overview* section looks at organic produce's share of the total fresh produce market, the top 10 organic produce categories (by both sales and volume), regional organic produce performance, and the year-over-year weekly percentage change in sales for both conventional and organic produce.

The State of Organic Produce 2023 report utilized Nielsen retail scan data covering total food sales and outlets in the US from January through December 2023. It is important to note that Nielsen IQ syndicated data reporting for the total US and regions changes on a regular basis. This is necessary as individual retailers open and close stores, redefine trade areas, acquire other retailers, and newly release or stop releasing their sales data. When Nielsen IQ syndicated data is restated to account for changes in the reporting universe, those adjustments are applied to current as well as historical data. As a result, a report "pulled" and built today cannot be compared to a report generated in prior years—even if the reporting time period is the same—as the underlying data inputs have been adjusted. This is true of all syndicated retail data sources and is industry standard practice across all retail departments.

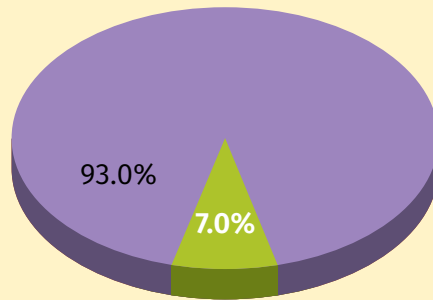
Conventional vs. Organic

Organic sales topped \$9.6 billion in 2023, and the category lagged a bit behind conventional in terms of year-over-year sales performance. While organic produce posted a sales gain of 1.6%, conventional produce saw a 1.9% increase. The two categories were nearly flat when it came to year-over-year volume performance, with organic produce posting an ever-so-slight loss of -0.1% and conventional produce logging a marginal gain of 0.1%.



Share of Total Produce Sales

Total Organic Sales	\$9,644,112,628
Organic Sales Change (YOY)	1.6%
Organic Sales Share	12%

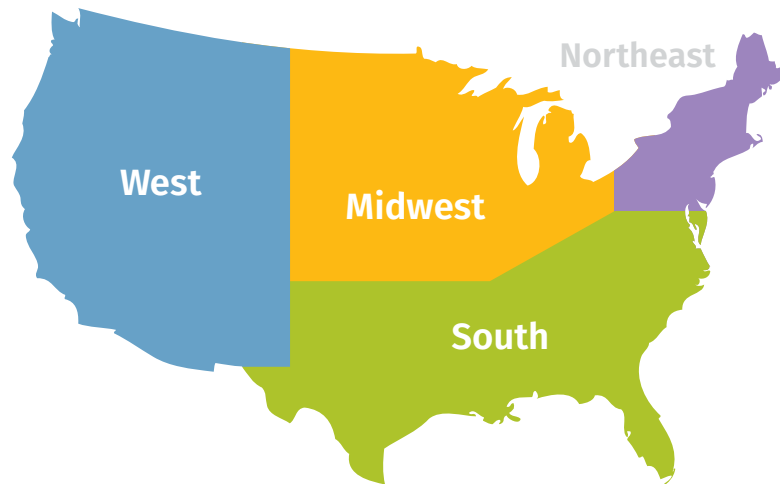


Share of Total Produce Volume

Total Organic Volume	2,937,299,446
Organic Volume Change (YOY)	-0.1%
Organic Volume Share	7%

Regional Organic Performance

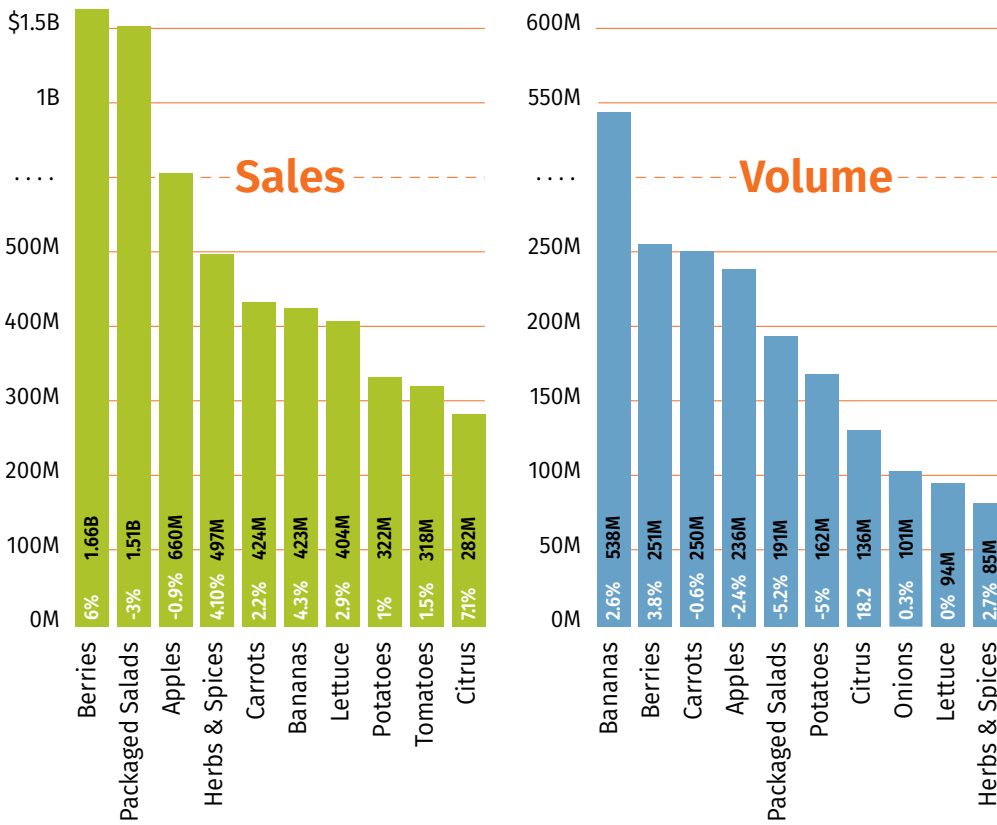
All four regions showed year-over-year sales gains in 2023, and the South was again the top performer, with an increase of 3.4%. Volume performance was a mixed bag, with the South and the Midwest logging increases and the West and the Northeast posting losses.



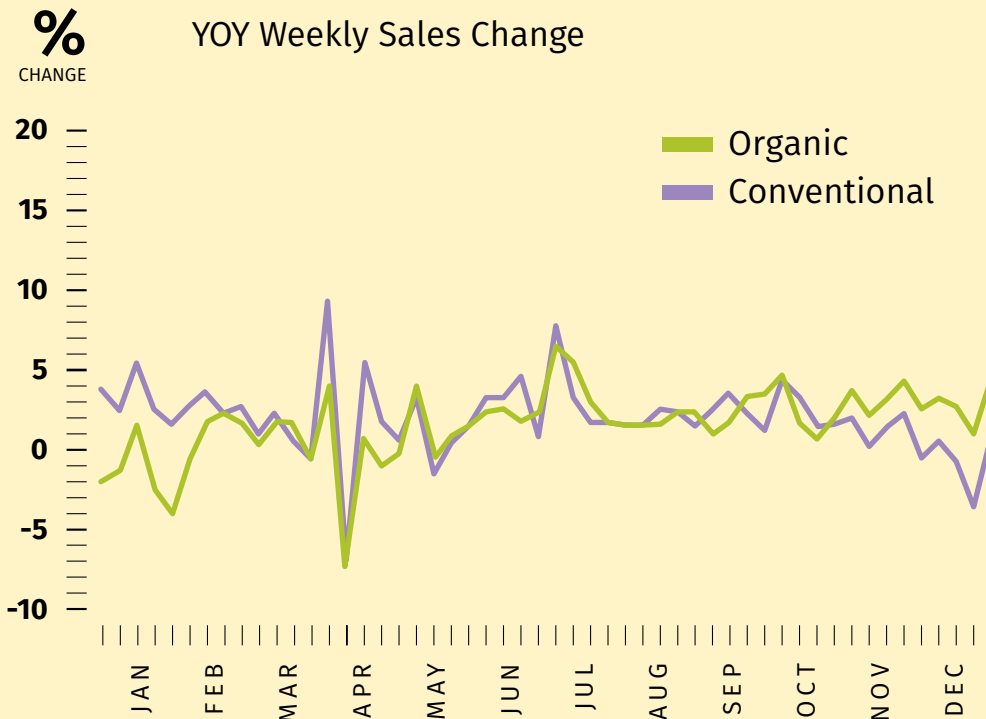
	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$2,904,166,704	\$1,441,953,319	\$3,116,592,029	\$2,169,482,999
Sales Change (YOY)	\$8,768,615	\$19,265,225	\$101,124,118	\$19,592,381
Sales % Change (YOY)	0.3%	1.4%	3.4%	0.9%
Volume (POUNDS)	912,447,017	453,006,113	979,098,516	590,595,310
Volume Change (YOY)	-24,272,801	2,257,258	2,7804,734	-8,122,495
Volume % Change (YOY)	-2.6%	0.5%	0.029%	-1.4%

Top 10 Organic Categories

Berries held the top sales spot for the second year in a row, with sales topping \$1.6 billion. Packaged salads followed close behind with sales of \$1.5 billion, and apples took a distant third with sales of \$660 million. The banana category continued to be the top-volume mover of the organic fresh produce sector in 2023 with 538 million pounds sold, and berries eclipsed carrots to narrowly take second place with a volume of 251 million pounds.



Year-Over-Year % Change in Weekly Sales, Conventional vs. Organic





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Leading Category Performers



Berries

For the second year in a row, organic berries (strawberries, blueberries, raspberries, and blackberries) took the top sales spot, raking in \$1.7 billion in 2023 and growing 6% from the prior year. And with 251 million pounds sold (up 3.8% from 2022), they were one of the top volume categories as well, second only to bananas. Organic berries had a price premium of 56% over conventional, indicating consumers were willing to pay significantly more for the organic version of these popular fruits.

We're seeing consistent demand for organic blueberries as the health-conscious consumer continues to seek out products with that USDA organic seal. We've also seen that consumers are increasingly reaching for larger pack sizes.

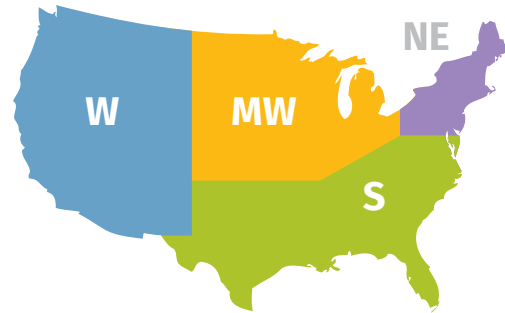
Brian Bocock

*Vice President of
Product Management*

Naturipe

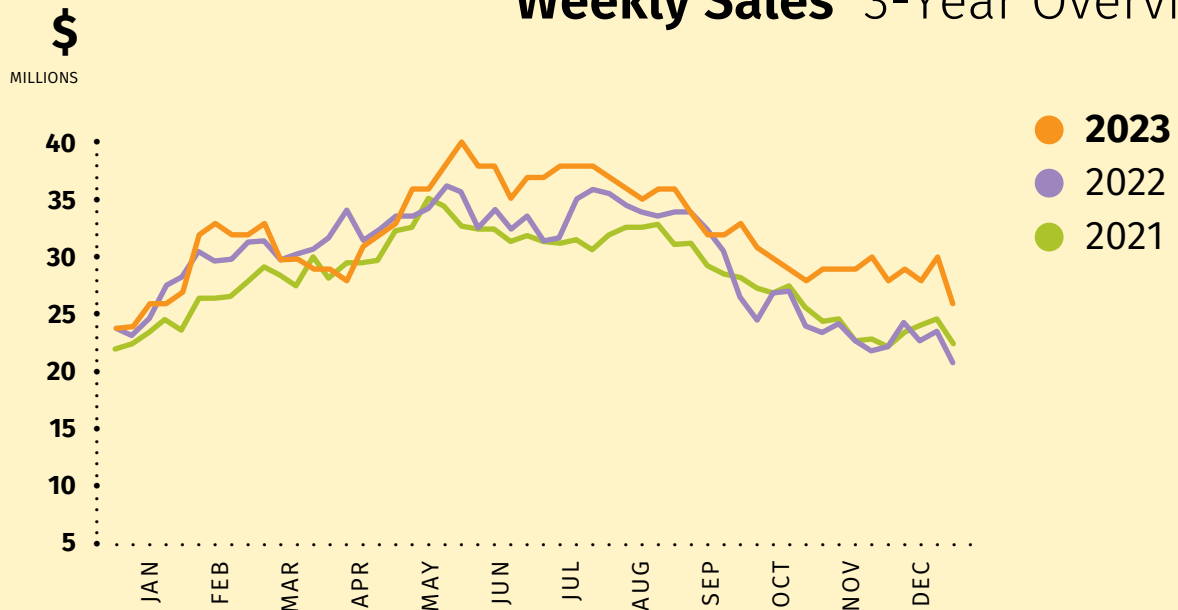
Regional Performance

Berries saw their best year-over year sales and volume performance in the South, with gains of 10.5% and 8.7%, respectively.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$491,009,142	\$244,215,141	\$531,049,507	\$394,760,450
Sales Change (YOY)	\$13,823,407	\$12,810,936	\$50,598,120	\$16,621,054
Sales % Change (YOY)	2.9%	5.5%	10.5%	4.4%
Volume (POUNDS)	72,147,706	39,411,317	84,515,509	54,571,589
Volume Change (YOY)	63,730	1,214,478	6,730,991	1,080,050
Volume % Change (YOY)	0.1%	3.2%	8.7%	2%

Weekly Sales 3-Year Overview





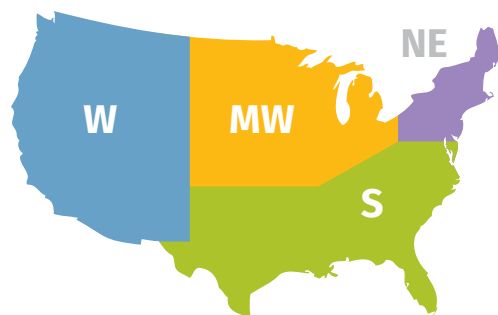
Packaged Salads

Taking the #2 spot, organic packaged salads showed impressive overall sales of \$1.5 billion in 2023. However, compared to the previous year, sales declined by -3% and volume dropped by -5.2%, perhaps due to the ongoing inflationary environment. On the bright side, the category showed a strong 68% price premium over its conventional counterpart.

In 2023, organic packaged salads showed impressive overall sales of \$1.5 billion.

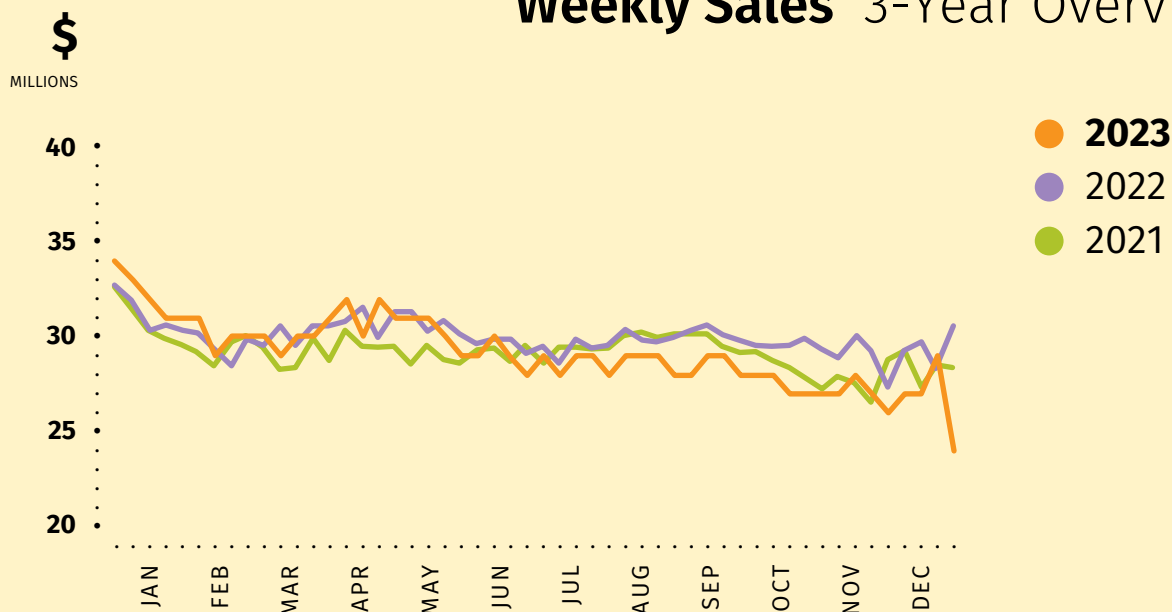
Regional Performance

Organic packaged salads showed year-over-year losses in both sales and volume in all four regions, with the Northeast posting the largest declines (-5.5% and -8.1%, respectively).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$412,524,381	\$269,376,611	\$501,433,204	\$325,889,407
Sales Change (YOY)	-\$10,396,082	-\$6,846,026	-\$9,984,129	-\$19,144,827
Sales % Change (YOY)	-2.5%	-2.5%	-2%	-5.5%
Volume (POUNDS)	52,208,262	34,995,014	64,249,948	39,245,135
Volume Change (YOY)	-3,064,985	-1,108,239	-2,883,982	-3,471,406
Volume % Change (YOY)	-5.5%	-3.1%	-4.3%	-8.1%

Weekly Sales 3-Year Overview





Apples

Logging \$660 million in sales, organic apples posted a small year-over-year sales decline of -0.9% in 2023. Volume also trended downwards, with a year-over-year loss of -2.4%, which was at least in part due to a very small Washington crop. With a 47% price premium over conventional, organic apples demonstrated that consumers were willing to pay considerably more for the organic version of this staple fruit.

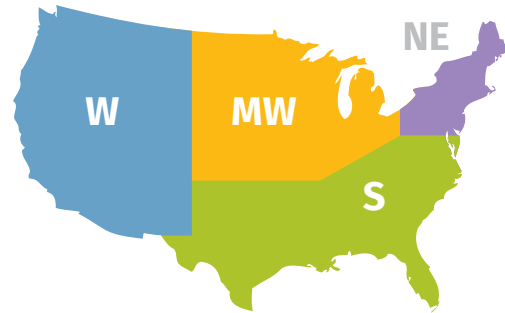
In America, as much as 30 percent of all apples and pears grown don't make the cut, abandoned for cosmetic reasons. Yet inside, these pieces of fruit are sweet as pie and just as tasty and nutritious as you'd expect an apple or pear to be.

Rochelle Bohm

Vice President of Marketing
CMI

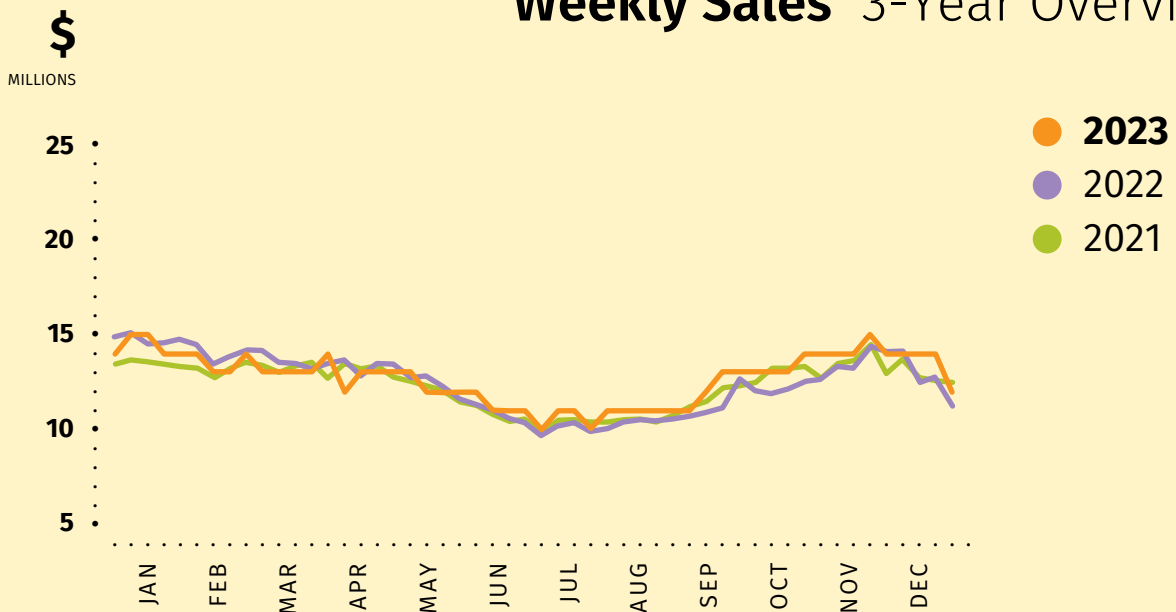
Regional Performance

The West was the only region to post a year-over-year sales gain (0.9%) in **organic apples** in 2023, while the Northeast and the Midwest were tied for the widest volume loss (-4.1%).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$179,897,355	\$94,172,203	\$237,094,809	\$147,754,414
Sales Change (YOY)	\$1,653,278	-\$3,066,176	-\$1,875,718	-\$2,257,969
Sales % Change (YOY)	0.9%	-3.2%	-0.8%	-1.5%
Volume (POUNDS)	63,214,218	35,374,050	84,797,397	52,873,020
Volume Change (YOY)	-193,166	-1,493,853	-1,939,278	-2,256,455
Volume % Change (YOY)	-0.3%	-4.1%	-2.2%	-4.1%

Weekly Sales 3-Year Overview





Herbs & Spices

The organic herbs and spices category continued on its upward growth trajectory in 2023, posting \$497 million in sales, a 4.1% increase from 2022. With 85 million pounds sold and a 2.7% gain over the prior year, organic herbs and spices showed solid performance on the volume side as well. But the brightest spot by far for this organic specialty category was its enormous price premium over conventional—a sky-high 306%. Retailers interested in boosting margins take note!

The use of fresh herbs for flavor, health benefits, and garnish from recipe developers online and home cooks everywhere FLOODS my socials day in and day out—each more inspiring and mouth-watering than the next!

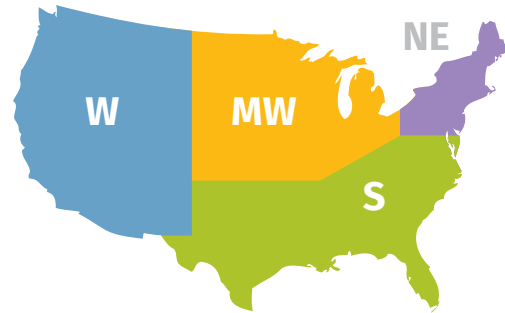
Dani Violante

Marketing and New Product Development Manager

Jacobs Farm del Cabo

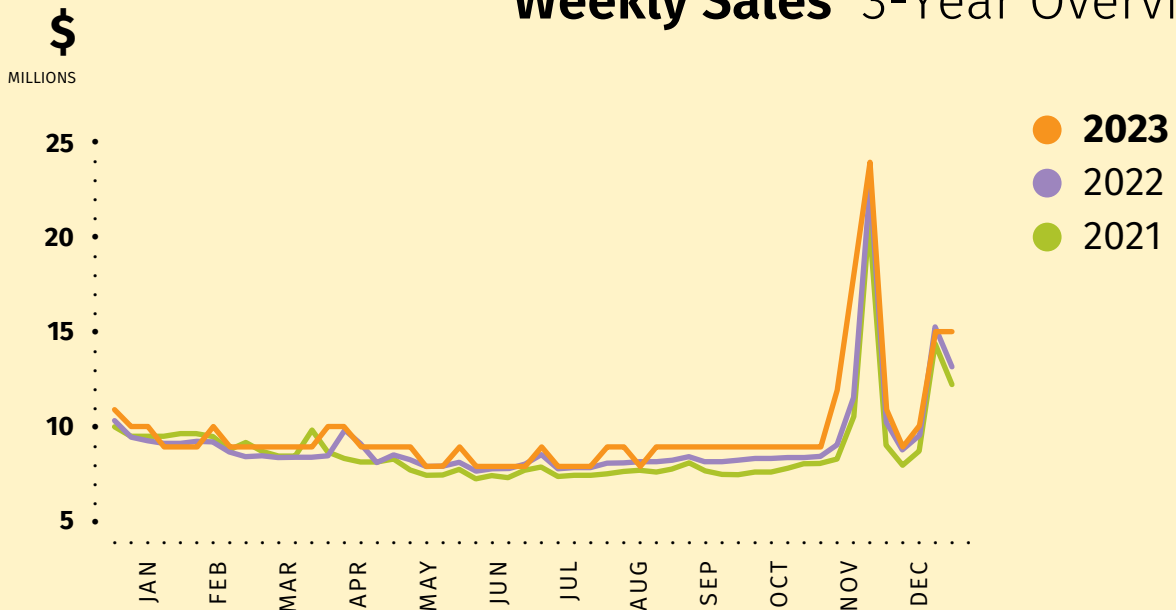
Regional Performance

Organic herbs and spices showed year-over-year increases in both sales and volume in all regions except the West, where the category posted a double-digit volume loss of -12.3%.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$149,321,829	\$71,216,223	\$166,557,744	\$109,631,312
Sales Change (YOY)	\$7,794,632	\$1,423,513	\$2,990,231	\$7,403,816
Sales % Change (YOY)	5.5%	2%	1.8%	7.2%
Volume (POUNDS)	30,345,463	11,172,284	25,716,434	17,773,105
Volume Change (YOY)	-4,251,414	885,087	3,884,701	1,751,248
Volume % Change (YOY)	-12.3%	8.6%	17.8%	10.9%

Weekly Sales 3-Year Overview





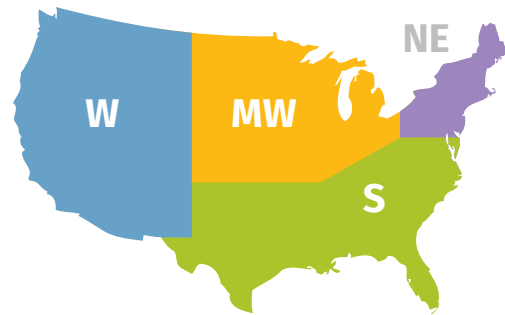
Carrots

Dropping down a spot to the #3 category by volume, organic carrots showed a -0.6% year-over-year decline in pounds sold in 2023. Still, with sales of \$424 million, this popular staple vegetable managed to achieve a 2.2% dollar gain over the previous year. Of the 20 leading categories analyzed for this report, organic carrots had the slimmest price premium compared to conventional at 24%, making them a great organic value option.

With sales of \$424 million, this popular staple vegetable managed to achieve a 2.2% dollar gain over the previous year.

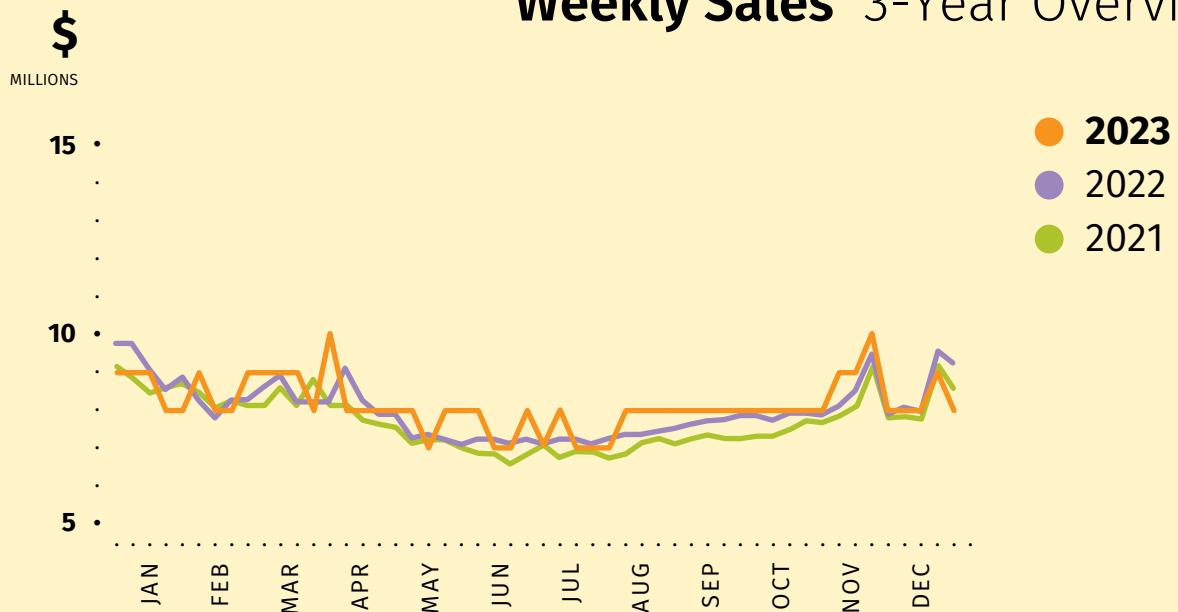
Regional Performance

Organic carrots posted sales gains in all four regions and volume losses everywhere except in the South, which saw a 1.3% gain.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$113,892,775	\$75,849,265	\$138,125,159	\$94,994,221
Sales Change (YOY)	\$1,741,286	\$1,758,714	\$4,153,718	\$1,268,748
Sales % Change (YOY)	1.6%	2.4%	3.1%	1.4%
Volume (POUNDS)	63,260,353	46,455,340	86,922,890	52,977,907
Volume Change (YOY)	-864,501	-635,368	1,089,407	-1,188,726
Volume % Change (YOY)	-1.3%	-1.3%	1.3%	-2.2%

Weekly Sales 3-Year Overview





Bananas

Organic bananas showed a healthy year-over-year sales increase of 4.3% in 2023, significantly outpacing the 1.6% growth of the overall organic produce category. And with 538 million pounds sold, this popular organic fruit continued to hold onto the top volume spot by a large margin. Organic bananas' 30% price premium over conventional was one of the narrower ones among the categories explored in this report, making it an affordable option for the organic-curious yet budget-minded consumer.

Bananas are the most popular and cheapest fruit in our basket, thanks to other invisible-to-us people (small growers, plantation workers) subsidizing our fruit through low wages, poor working conditions, and environmental shortcuts. We reject this historical model and are working to change deeply ingrained mindsets on banana pricing.

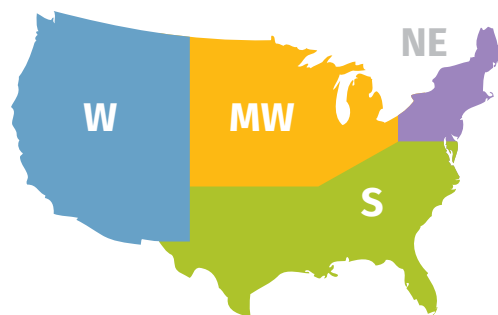
Jennie Coleman

President

Equifruit

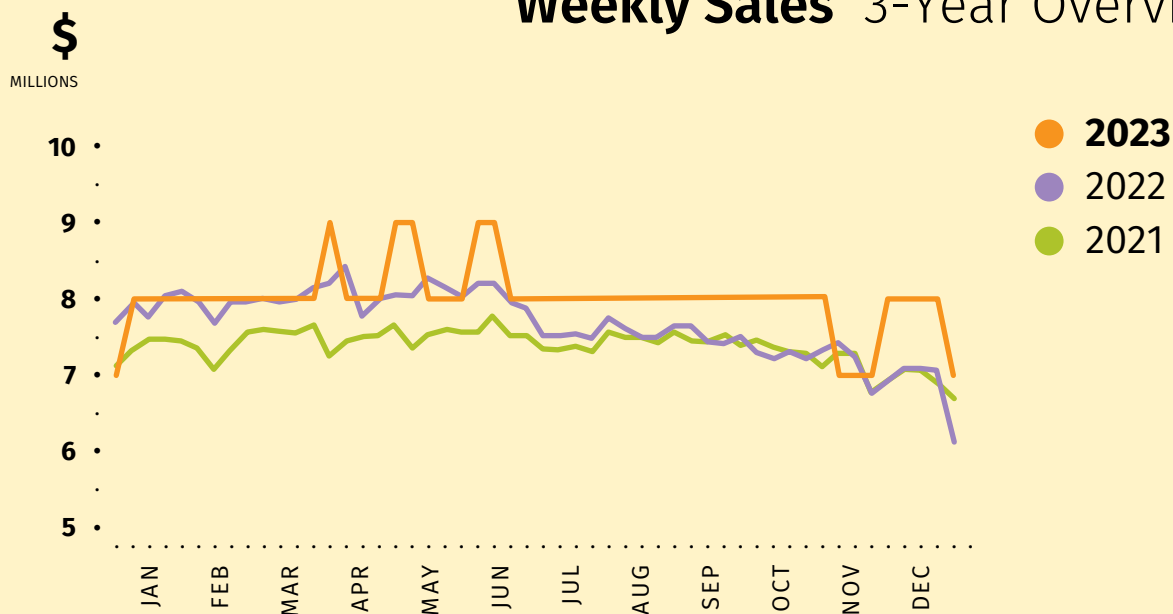
Regional Performance

Organic banana sales and volume flourished in the South in 2023, with gains of 10.3% and 9.6%, respectively.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$127,851,040	\$69,794,257	\$148,497,445	\$76,853,793
Sales Change (YOY)	\$749,105	\$4,132,109	\$13,898,186	-\$1,549,519
Sales % Change (YOY)	0.6%	6.3%	10.3%	-2%
Volume (POUNDS)	148,066,670	92,657,182	201,075,677	96,469,901
Volume Change (YOY)	-3,046,132	2,868,628	17,663,098	-4,191,795
Volume % Change (YOY)	-2%	3.2%	9.6%	-4.2%

Weekly Sales 3-Year Overview





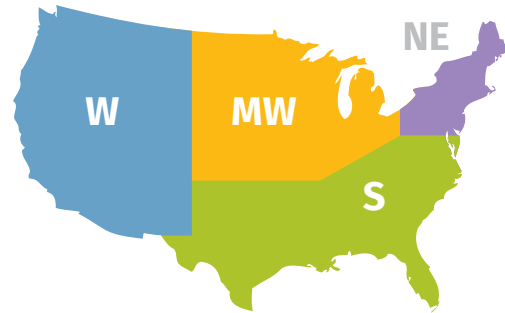
Lettuce

With \$404 million in sales, organic lettuce bounced back from its 2022 decline, increasing by 2.9% in 2023. While the category's year-over-year volume performance was flat (0%), this was a marked improvement over its 2022 double-digit loss. As has been the case in prior years, organic lettuce was one of the top categories by price premium, selling for an average of 119% more per pound than conventional lettuce in 2023.

Organic lettuce was one of the top categories by price premium, selling for an average of 119% more per pound than conventional lettuce in 2023.

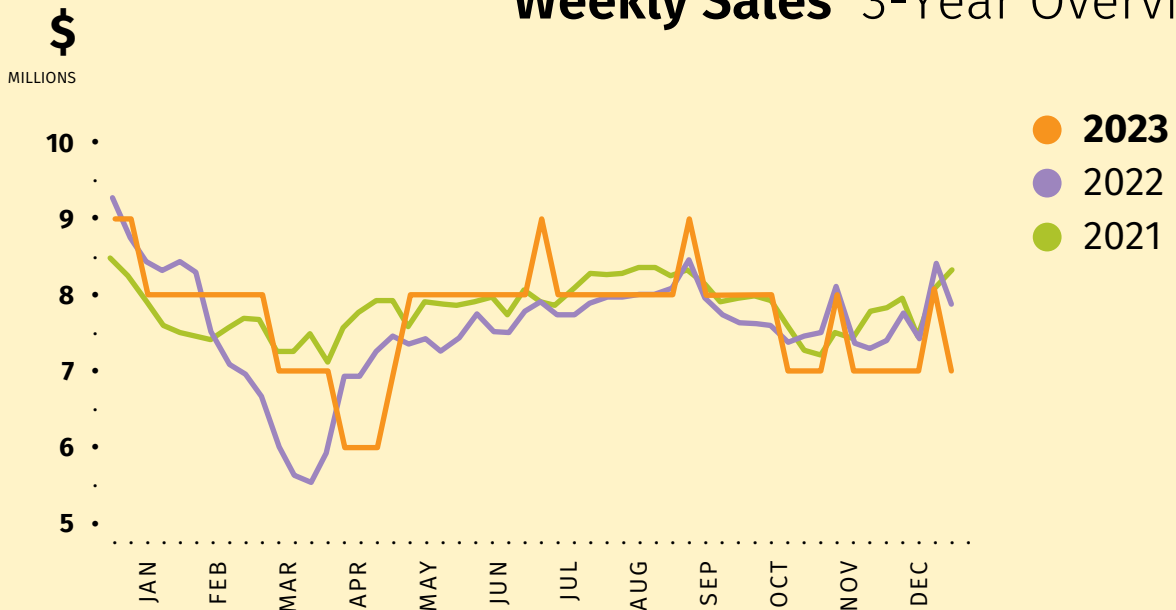
Regional Performance

Organic lettuce logged year-over-year increases in both sales and volume in all regions except the West, where it posted a -5% volume loss.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$124,379,983	\$51,033,096	\$128,471,197	\$98,791,560
Sales Change (YOY)	\$1,293,032	\$2,584,675	\$3,873,971	\$3,691,818
Sales % Change (YOY)	1.1%	5.3%	3.1%	3.9%
Volume (POUNDS)	31,153,104	12,730,838	32,722,502	17,678,269
Volume Change (YOY)	-1,651,522	636,855	638,819	349,226
Volume % Change (YOY)	-5%	5.3%	2%	2%

Weekly Sales 3-Year Overview





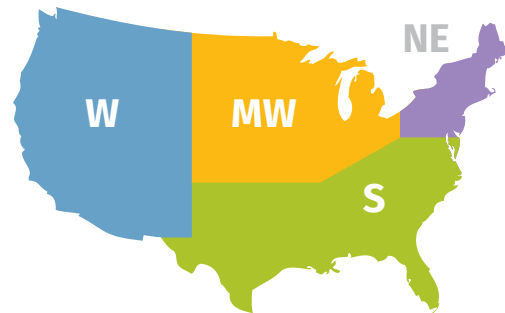
Potatoes

With total sales of \$322 million, organic potatoes posted a small year-over-year sales gain of 1% in 2023, a much more modest performance than that of the prior year. While the category showed a -5% year-over-year volume loss, it still continued to excel in the price-premium arena, selling for 92% more per pound than its conventional counterpart.

In 2023, organic potatoes sold for an impressive 92% more per pound than their conventional counterparts.

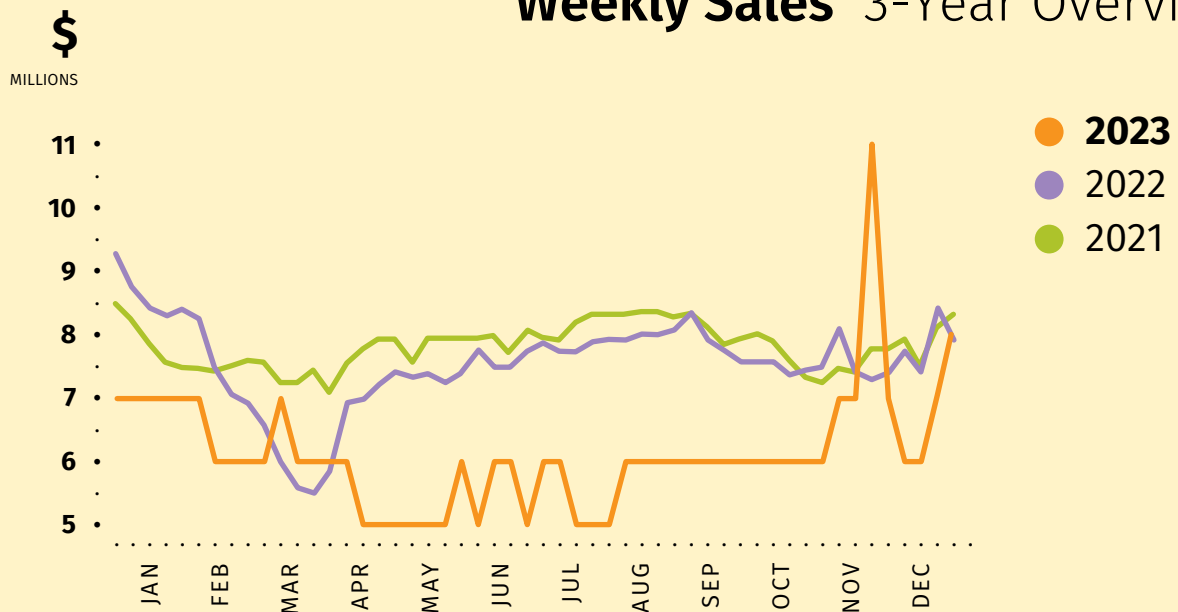
Regional Performance

Organic potatoes showed year-over-year volume losses in all four regions, with the largest decline in the West (-8.4%).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$91,084,917	\$42,801,921	\$113,371,013	\$74,034,687
Sales Change (YOY)	-\$378,382	-\$524,630	\$1,087,579	\$2,857,521
Sales % Change (YOY)	-0.4%	-1.2%	1%	4%
Volume (POUNDS)	44,897,211	21,643,542	59,177,195	35,731,237
Volume Change (YOY)	-4,092,326	-1,496,425	-2,654,072	-241,434
Volume % Change (YOY)	-8.4%	-6.5%	-4.3%	-0.7%

Weekly Sales 3-Year Overview





Tomatoes

With a sales gain of 1.5%, organic tomatoes closely mirrored the overall dollar growth of the organic produce category in 2023. Total sales were \$318 million, while volume was 74 million pounds, representing a -4% decline from the prior year. Organic tomatoes continued to demonstrate an excellent price premium, selling for 103% more than the conventional fruit, up 12 percentage points from 2022.

Demand [for organic snacking tomatoes] is up more than ever—with plenty of competition, sometimes making the market full of opportunity and sometimes challenging.

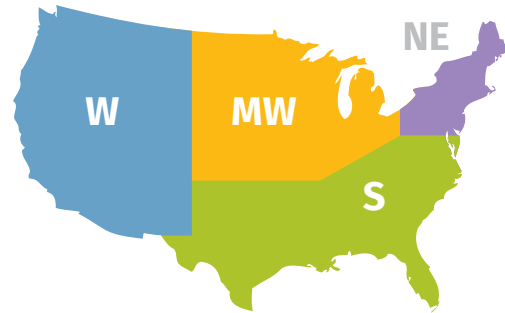
Dani Violante

*Marketing and New Product
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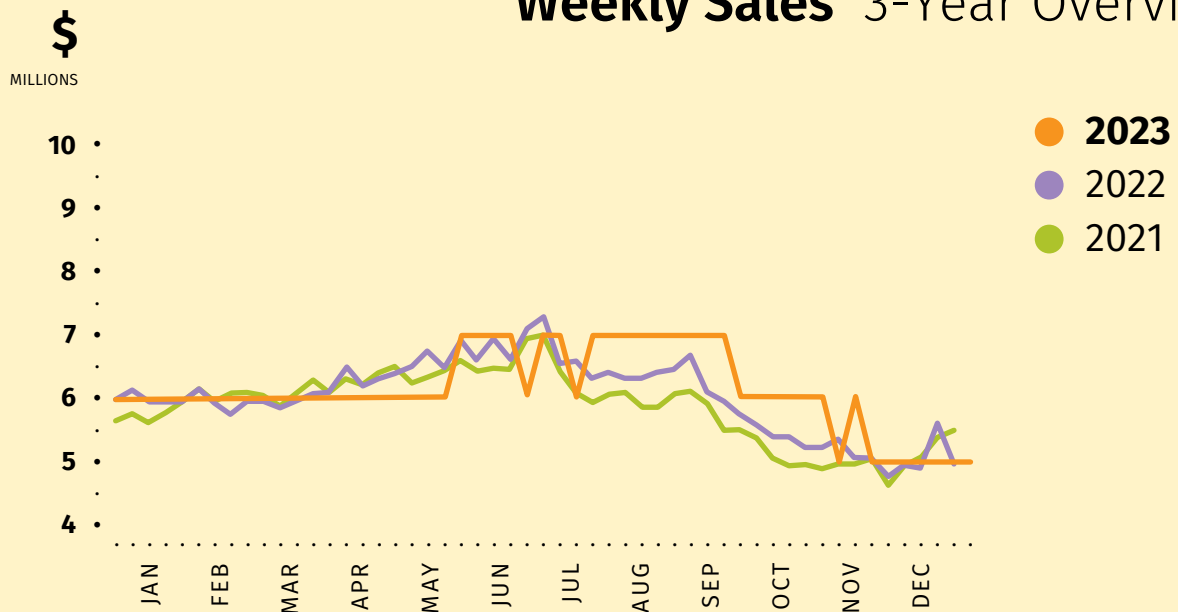
Regional Performance

The **organic tomato** category posted its biggest sales gain in the Northeast (5.6%) and its widest volume loss in the Midwest (-6.3%).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$108,267,233	\$40,379,401	\$90,574,624	\$77,618,379
Sales Change (YOY)	\$370,561	-\$308,535	\$304,848	\$4,099,986
Sales % Change (YOY)	0.3%	-0.8%	0.3%	5.6%
Volume (POUNDS)	25,070,468	10,071,601	22,468,443	16,085,942
Volume Change (YOY)	-1,103,416	-672,176	-1,305,084	8,699
Volume % Change (YOY)	-4.2%	-6.3%	-5.5%	0.1%

Weekly Sales 3-Year Overview





Citrus

Citrus moved up a spot in 2023, eclipsing grapes with total sales of \$282 million and a strong year-over-year dollar gain of 7.1%. The category's volume performance was also excellent, boasting an 18.2% jump in pounds sold compared to 2022. On a less positive note, the category saw its price premium over conventional nearly cut in half to 25% (down from 44% the prior year).

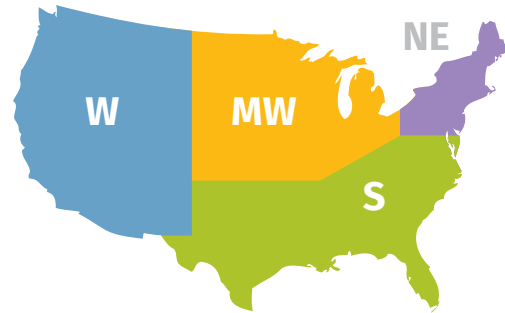
The year-round availability of organic lemons and the sweet, healthful delights of navel and Valencia oranges place them at the forefront of consumer demand.

Garff Hathcock

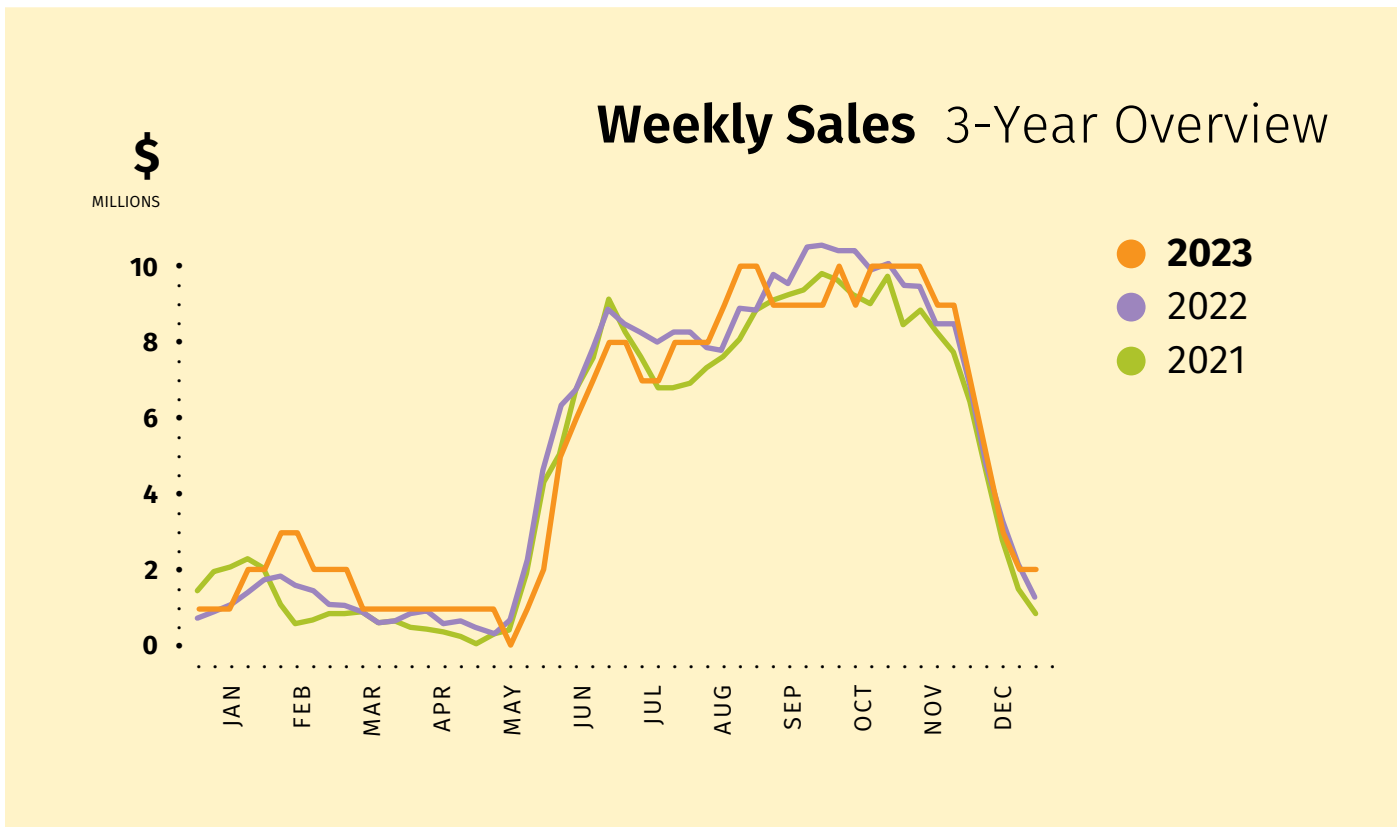
*Director of Field Operations
and Organic Division Manager*
CCH Citrus

Regional Performance

Organic citrus showed double-digit year-over-year volume gains in all four regions, with the Midwest posting the largest increase (22.9%).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$82,599,477	\$39,197,339	\$96,940,504	\$63,269,800
Sales Change (YOY)	\$3,380,748	\$1,304,598	\$9,237,164	\$4,667,064
Sales % Change (YOY)	4.3%	3.4%	10.5%	8%
Volume (POUNDS)	50,892,070	19,072,851	40,460,921	25,101,655
Volume Change (YOY)	8,152,075	3,548,284	5,523,282	3,636,236
Volume % Change (YOY)	19.1%	22.9%	15.8%	16.9%



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Grapes

#11 in Sales

Bumped down a spot to #11 in 2023, the organic grape category had total sales of \$265 million, representing a -1.6% decline from the prior year. Even more pronounced was the category’s volume loss of -10.4%, with 74 million pounds sold. In terms of good news, organic grapes’ price premium over conventional grew to 46%, a jump of six percentage points from 2022.

Today’s grape success revolves around growers developing proprietary varieties that focus on color, size, sugar, and texture.

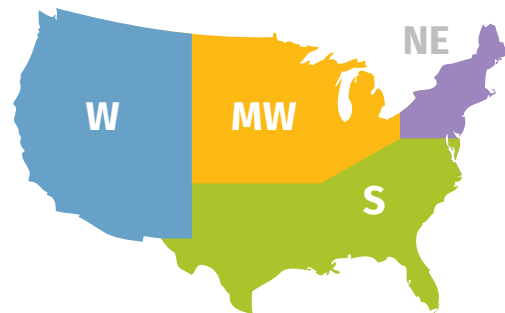
Jeff Fairchild

Produce Buyer

Organically Grown Company

Regional Performance

Organic grapes had their best sales performance in the West (0.8%), while their widest volume loss was in the Northeast (-17.9%).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$75,246,987	\$35,086,036	\$98,060,406	\$56,093,760
Sales Change (YOY)	\$601,061	-\$560,954	\$131,842	-\$4,391,941
Sales % Change (YOY)	0.8%	-1.6%	0.1%	-7.3%
Volume (POUNDS)	20,877,365	10,067,344	28,761,016	14,224,439
Volume Change (YOY)	-2,489,422	-1,045,931	-1,891,194	-3,096,053
Volume % Change (YOY)	-10.7%	-9.4%	-6.2%	-17.9%

Avocados

#12 in Sales

Organic avocados showed weak year-over-year sales performance in 2023, declining -6.6% with total sales of \$249 million. On the volume side of things, the category fared much better, logging an increase of 4.9% with 70 million pounds sold. Organic avocados managed to hold on to a solid price premium over conventional in 2023, up four percentage points from the prior year to 56%.

Bagged or packaged avocados are ... a great way to capture the attention of organic avocado shoppers. ... In fact, nearly two-thirds of avocado industry organic sales come from bagged organics!

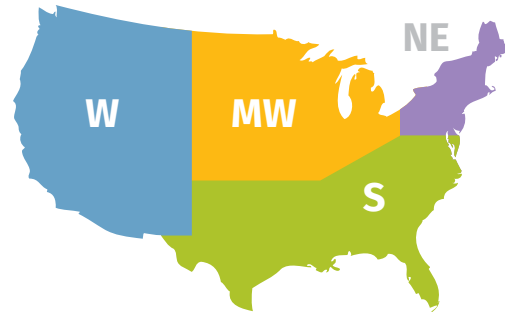
Megan Berenbach

Director of Sales

Mission Produce

Regional Performance

Organic avocados had their largest year-over-year volume gain in the West (8.6%) and their widest sales loss in the Northeast (-7.5%).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$105,905,666	\$28,162,991	\$66,475,828	\$47,842,464
Sales Change (YOY)	-\$7,702,674	-\$1,592,867	-\$4,421,445	-\$3,853,266
Sales % Change (YOY)	-6.8%	-5.4%	-6.2%	-7.5%
Volume (POUNDS)	31,064,033	7,874,386	17,678,796	13,031,957
Volume Change (YOY)	2,467,236	535,307	78,881	118,169
Volume % Change (YOY)	8.6%	7.3%	0.4%	0.9%



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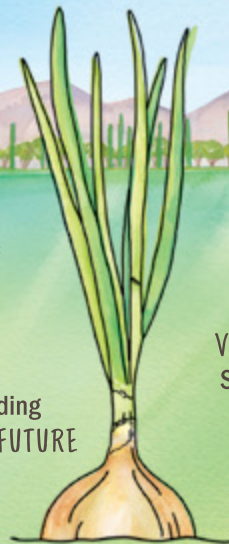


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Mushrooms

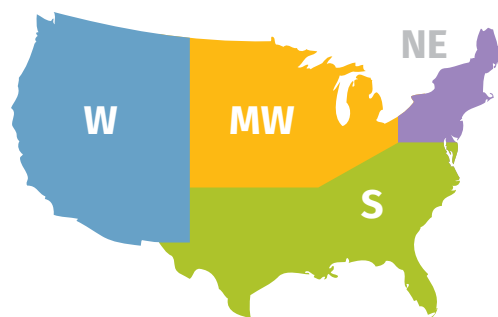
#13 in Sales

With sales of \$237 million and a volume of 33 million pounds, organic mushrooms saw a modest year-over-year dollar gain of 1.9% in 2023, while volume dipped by -1.6%. Landing in the middle of the 20 leading category performers in terms of price premium, organic mushrooms sold for 57% more than their conventional counterparts last year.

Organic mushrooms saw a modest year-over-year dollar gain of 1.9% in 2023

Regional Performance

Organic mushrooms had their strongest performance by far in the South, with a year-over-year sales gain of 13.2% and a volume increase of 6.1%.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$76,129,455	\$60,943,825	\$63,102,171	\$36,603,120
Sales Change (YOY)	-\$2,378,105	\$226,551	\$7,363,340	-\$887,868
Sales % Change (YOY)	-3%	0.4%	13.2%	-2.4%
Volume (POUNDS)	10,532,688	10,359,758	7,771,839	3,933,652
Volume Change (YOY)	-691,696	-83,581	448,690	-195,674
Volume % Change (YOY)	-6.2%	-0.8%	6.1%	-4.7%

Onions

#14 in Sales

With \$233 million in sales, organic onions managed to post a modest year-over-year dollar gain of 2.2% in 2023, a far cry from the prior year's double-digit increase. Volume growth was positive but nearly flat at 0.3%. In terms of price premium, the category performed well, selling for an average of 60% more per pound than its conventional counterpart.

We're experiencing one of the tightest organic onion markets in distant memory. We expect this to continue through spring and summer. Demand is extremely strong, and pricing is some of the highest ever

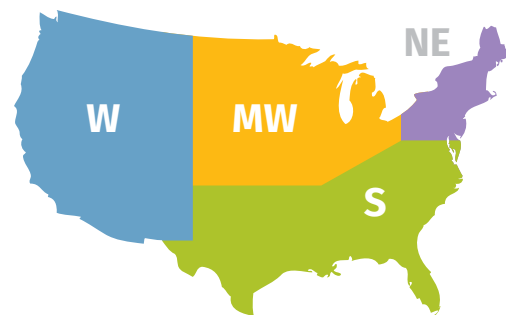
Kurt Jacobos

Sales

Bridges Produce

Regional Performance

Organic onions had their best year-over-year performance in both sales and volume in the Northeast, where they logged respective gains of 8.2% and 6.9%.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$67,946,127	\$28,618,225	\$78,863,185	\$57,253,569
Sales Change (YOY)	\$1,240,263	\$1,998,029	\$1,513,132	\$4,315,343
Sales % Change (YOY)	1.9%	-6.5%	2%	8.2%
Volume (POUNDS)	28,412,618	12,485,238	38,672,377	21,555,741
Volume Change (YOY)	-180,573	-1,906,750	957,578	1,398,503
Volume % Change (YOY)	-0.6%	-13.2%	2.5%	6.9%

Broccoli

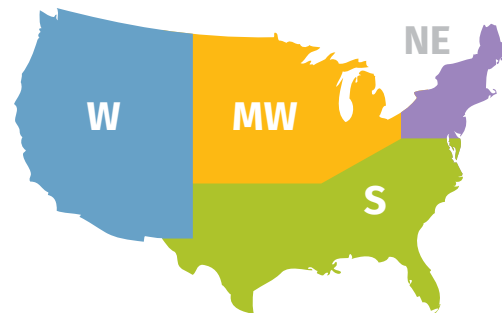
#15 in Sales

The best-performing category by sales growth, organic broccoli showed a 7.5% year-over-year increase in 2023 with total sales of \$202 million. On the volume side of things, the category also performed well, achieving a gain of 6.3% with 54 million pounds sold. At 51%, the price premium of organic broccoli continued to be solid in 2023, though it did drop eight percentage points from the prior year.

Organic broccoli showed a 7.5% year-over-year increase in 2023.

Regional Performance

Organic broccoli had its strongest year-over-year performance in both sales and volume in the Midwest, with increases of 12% and 10.4%, respectively.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$69,824,902	\$25,356,937	\$60,572,742	\$45,640,709
Sales Change (YOY)	\$4,031,409	\$2,719,703	\$5,738,915	\$1,512,354
Sales % Change (YOY)	6.1%	12%	10.5%	3.4%
Volume (POUNDS)	19,947,876	6,895,813	16,545,556	10,609,964
Volume Change (YOY)	1,253,539	651,776	1,200,472	66,369
Volume % Change (YOY)	6.7%	10.4%	7.8%	0.6%

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Bell Peppers

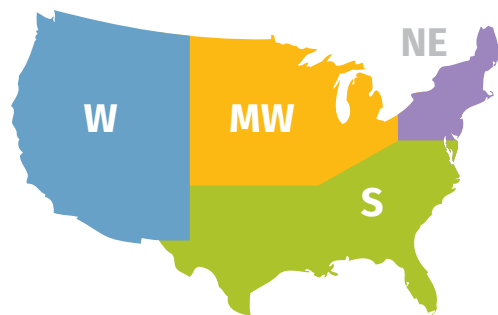
#16 in Sales

Logging \$189 million in sales, organic bell peppers had solid year-over-year dollar growth of 4.8% in 2023. Volume dipped by -7%, however, showing that this organic commodity took advantage of strong pricing to achieve its sales gain. Selling for 36% more than its conventional counterpart, organic bell peppers had one of the narrower price premiums of the 20 categories analyzed in this report.

Organic bell peppers sold for 36% more than their conventional counterpart.

Regional Performance

Organic bell peppers had their strongest year-over-year sales performance in the South (8.1%) and their best volume performance in the Northeast (5.7%)



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$61,321,474	\$28,784,707	\$61,441,219	\$37,447,529
Sales Change (YOY)	\$649,227	\$1,074,037	\$4,588,213	\$2,318,699
Sales % Change (YOY)	1.1%	3.9%	8.1%	6.6%
Volume (POUNDS)	19,081,810	7,328,201	14,264,657	7,344,299
Volume Change (YOY)	-4,219,304	-342,084	563,911	396,372
Volume % Change (YOY)	-18.1%	-4.5%	4.1%	5.7%

Cucumbers

#17 in Sales

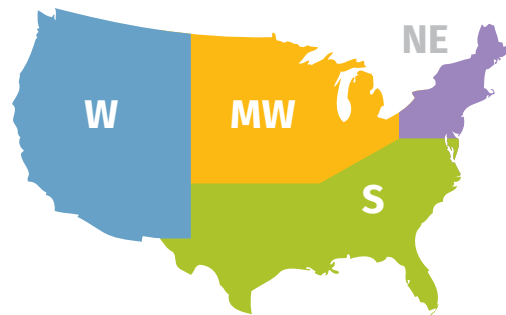
Organic cucumbers performed nicely in 2023, garnering sales of \$186 million, representing a 5.4% increase from 2022. Volume grew by 8.6% compared to the previous year, with 66 million pounds sold. In terms of their price premium over conventional, organic cucumbers experienced a steep decline, dropping from 138% in 2022 to 73% in 2023.

Demand on organics across the board has definitely increased, and cucumbers have been on the top of the list along with some other items.

Juan Carlos Barrionuevo
Organic Cucumber Manager
Sunfed

Regional Performance

Organic cucumbers enjoyed their strongest year-over-year sales performance in the Northeast (8.6%) and their biggest volume gain in the South (10.7%).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$52,760,493	\$26,483,815	\$56,933,343	\$49,209,361
Sales Change (YOY)	\$613,537	\$535,284	\$4,472,336	\$3,882,476
Sales % Change (YOY)	1.2%	2.1%	8.5%	8.6%
Volume (POUNDS)	29,066,373	9,373,238	17,037,383	10,823,380
Volume Change (YOY)	2,521,479	890,187	1,648,386	216,973
Volume % Change (YOY)	9.5%	10.5%	10.7%	2%

Celery

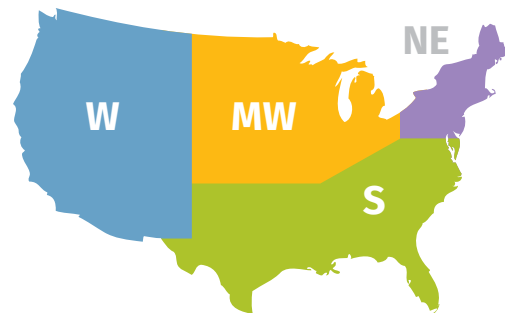
#18 in Sales

Organic celery took a volume dive in 2023, declining -16.6% from the prior year, which was at least in part due to wet and cold weather in California. But with sales of \$156 million, the category's year-over-year dollar loss was much narrower at -1.2%. Organic celery's price premium over conventional was on the lower end of the 20 categories analyzed in this report, coming in at 37%.

Organic celery took a volume dive in 2023, declining -16.6%.

Regional Performance

Organic celery had significant year-over-year volume losses in all four regions, but its largest loss by far was in the West (-30%).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$39,343,334	\$26,018,963	\$49,889,482	\$40,713,285
Sales Change (YOY)	\$203,201	-\$77,985	\$137,451	-\$2,091,837
Sales % Change (YOY)	0.5%	-0.3%	0.3%	-4.9%
Volume (POUNDS)	15,132,924	8,520,241	16,267,455	11,300,794
Volume Change (YOY)	-6,488,016	-893,289	-1,320,713	-1,540,997
Volume % Change (YOY)	-30%	-9.5%	-7.5%	-12%

Squash

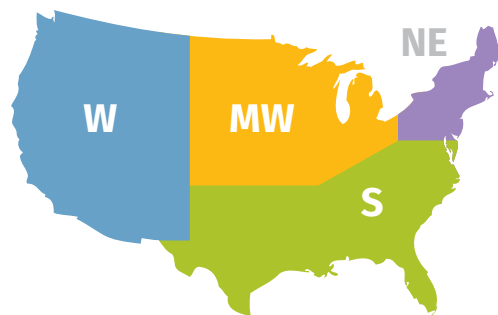
#19 in Sales

Organic squash experienced another year of negative dollar growth in 2023, posting a year-over-year loss of -2.6% with sales of \$124 million. Volume declined again as well, with a drop of -4.9% on volume movement of 45 million pounds. On the positive side, organic squash continued to enjoy a strong price premium, selling for 77% more than its conventional counterpart.

Organic squash continued to enjoy a strong price premium in 2023, selling for 77% more than its conventional counterpart.

Regional Performance

Organic squash logged year-over-year losses in both sales and volume in every region except the Northeast, where it had a sales gain of 1.7%.



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$39,729,501	\$13,676,410	\$37,836,134	\$32,235,274
Sales Change (YOY)	-\$2,448,733	-\$324,043	-\$982,804	\$538,887
Sales % Change (YOY)	-5.8%	-2.3%	-2.5%	1.7%
Volume (POUNDS)	17,123,601	5,229,2042	12,373,849	9,871,484
Volume Change (YOY)	-1,015,206	-472,194	-626,673	-151,955
Volume % Change (YOY)	-5.6%	-8.3%	-4.8%	-1.5%

Kale

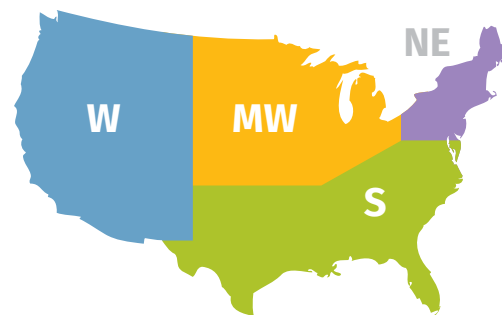
#20 in Sales

The final member of the leading category performers, organic kale showed year-over-year losses again in 2023. With total sales of \$109 million, this ubiquitous leafy green posted a dollar decrease of -3.7% and a volume decline of -5.9%, continuing to signify a cooling of its once-meteoritic growth in popularity. Despite its lackluster sales and volume performance, the category managed to achieve a healthy price premium, selling for 49% more than its conventional counterpart.

In 2023, organic kale posted a dollar decrease of -3.7% and a volume decline of -5.9%.

Regional Performance

Organic kale showed year-over-year declines in both sales and volume in all four regions, with its widest losses found in the Midwest (-8.7% and -10.7%, respectively).



	WEST	MIDWEST	SOUTH	NORTHEAST
Sales	\$39,836,155	\$10,767,628	\$32,274,823	\$25,524,142
Sales Change (YOY)	-\$1,124,649	-\$1,019,936	-\$1,224,105	-\$791,899
Sales % Change (YOY)	-2.7%	-8.7%	-3.7%	-3%
Volume (POUNDS)	14,723,652	3,412,586	7,409,393	5,906,800
Volume Change (YOY)	-806,828	-410,276	-357,050	-397,814
Volume % Change (YOY)	-5.2%	-10.7%	-4.6%	-6.3%



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Retailer and Wholesaler Snapshots

Retailer & Wholesaler Snapshots

Inflation continued to be a major issue in 2023, but it didn't affect volume as much as it had the prior year, perhaps in part due to strategic retail promotional strategies. Other issues top of mind for retailers and wholesalers in 2023 included reducing food waste, diversifying supplier partnerships, regenerative ag, and continued consumer interest in home cooking.



With all the changes in our world (climate, COVID, etc.), we have had to expand and diversify some of our partnerships. Before, we primarily bought produce from the West Coast and locally. We now have partnerships and buy products from all over the country.

James Collins
Senior Director of Supply Chain
Twin Cities Co-op Partners

We have seen price point and promotional opportunity drive volume in a more significant way currently than it has in the past. This is a great moment to find opportunistic partnerships between the supply and retail sides in order to provide value and drive volume where we can. Simply put, consumers are seeking value—which I believe is the crossroad between quality and price point—more than ever at this moment.

Chris Miller
Produce Director
MOM's Organic Market

We are always working with our vendors to ensure that we stay committed to bringing only the best quality to our customers. Growers that are taking it a step beyond and using practices that build soil integrity and lessen the need for additives and additional watering are leaving a better future for the generations to come.

Scott Wiggans
Produce Director
Lazy Acres

Sprouts has always been committed to eliminating food waste. [Starting] our Rescued Organics Program was a great opportunity for us to partner with our suppliers and use more of the crop. The items aren't as pretty as what you would traditionally see on shelf, but they are just as fresh and taste just as good!

Sonya Constable
Vice President of Produce
Sprouts Farmers Market

Our shoppers come to Jimbo's looking for the best ingredients for their meals, and they've shown that they're willing to pay more for items that are full of flavor and healthy. ... It is crucial that we meet [the home-cooking] demand by providing the highest-quality, best-tasting organic produce possible, staying consistent with our fresh and in-stock conditions daily.

Ryan Peterson
Director of Produce and Floral
Jimbo's

You have really talented conventional guys seeing that there's demand from customers, so they made the decision to convert conventional acreage over and farm it. The rise in organic production gave us scale. We were off to the races!

Michael Schutt
Produce & Floral Director
Raley's

Research and data have shown that when we grow and consume fruits, vegetables, and dairy via organic and regenerative organic practices, there are benefits both to the planet and consumers' overall well-being. ... The more consumers are exposed to information on the benefits of crops grown this way, the more they will demand items grown this way and not be deterred by price.

Jessica Groves
Community Impact Manager
The GIANT Company





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Hot-Button Topics

Hot-Button Topics

As a relatively young and growing industry, the organic produce trade has its fair share of hot-button issues. In 2023, these included food safety, the upcoming Farm Bill, the effects of inflation, and of course the consistent buzz surrounding regenerative ag.



This year is a critical one for our policy work as the Farm Bill is up for reauthorization and will set the agenda for agriculture policy and spending for years to come. OTA is putting in a tremendous effort to advocate for organic throughout the legislative process to ensure the continuous improvement of our industry.

Tom Chapman

*Co-CEO and Executive Director
Organic Trade Association*

There was a little bit of denial from growers and retailers in the beginning because we haven't seen this kind of inflation since the seventies and early eighties. But once they recognized the current reality, we started talking about what we could do about it. ... We're not going to beat last year's overall numbers, so put that idea out of your mind. Growth just doesn't keep growing all the time. We're in a different environment. The whole market shrank anywhere from 10 to 20 percent on the unit side.

Drew Knobel

*Director of Sales and Marketing
Earl's Organic*

Stakeholder engagement through [The Organic Center's] partnership with the Organic Trade Association revealed that food safety management was particularly challenging for organic farmers for various administrative and operational reasons.

Dr. Amber Sciligo

*Director of Science Programs
The Organic Center*

They can't be separated. It is impossible to be regenerative and not be organic.

Vernon Peterson
Owner
Abundant Harvest Organics

Inflation-related price pressure as well as the cost and availability of labor and ongoing supply chain issues are contributing to constrained growth in the sector. But organic is, and always has been, about long-term thinking and investment. Organic's fundamental values remain strong, and consumers have demonstrated they will come back time and again because the organic system is verified and better for people, the planet, and the economy.

Tom Chapman
Co-CEO and Executive Director
Organic Trade Association

Our aim is to increase demand and build trust in the organic label. We've been listening to the requests from our customers and suppliers who are asking for help telling the organic story to shoppers. Like us, they want people to understand what it truly stands for and why it's the gold standard.

Krista Kinder
Vice President of Marketing
Organically Grown Company

There are people whose core job it is to find and capture this data. And it goes into a filing cabinet, and nobody really looks at [it]. We want to put data back in the hands of farmers.

Megan Nunes
Founder and CEO
Bountiful





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2023 Events

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Organic
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Summit

July 12–13

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OGS
Organic
Grower
Summit

November 29–30

.....



Organic Produce Summit



With more than 1,800 attendees, the event's largest turnout ever, OPS 2023 featured organic fresh produce growers, shippers, and producers meeting with over 300 retail representatives from across North America to discuss the growth of organic fresh produce and the opportunities that lie ahead to further bolster sales and consumption in line with evolving consumer lifestyles.

New organic rules and regulations, the challenges facing Controlled Environment Agriculture, and the ability to effectively connect the benefits of organic fresh produce to consumers were among the hot-button topics explored at the seventh annual **Organic Produce Summit**, held **July 12-13** in Monterey, California.

Day one of OPS 2023 kicked off with a series of retailer field tours to Taylor Farms/Earthbound Farm, Driscoll's, and Braga Fresh production facilities, followed by a gala opening reception that evening. The second day of OPS featured five educational sessions and a pair of keynote presentations that explored the growth and evolution of the organic produce industry. The event concluded with a sold-out tradeshow floor of 170 organic producers highlighting their products to retailers and buyers.



The show has had a great turnout, and it's always nice to see familiar faces and make connections with new vendors. We look to expand our organic assortment, and this show gives us a great opportunity to do so.

Katie Gagnon
Associate Buyer
Grocery Outlet

This was my first year at OPS, and I came early to visit some growers in the Central Valley, which tied in nicely. I really liked how the show did a great job of spreading out companies in similar categories across the show floor and look forward to returning!

Robert Backer
Category Buyer
The Giant Company

OPS is one of the best shows to actually get things done.

Chester Young
Division Manager
UNFI

OPS provided a great opportunity for us to showcase our marketing tools, the brand, and the people behind it. The show provided us plenty of face-to-face time with existing and future retail partners. It was a great couple of days in Monterey, and I will definitely mark it in the calendar for 2024.

Cecilia Flores Paez
Head of Marketing
T&G Global Limited NAM



ORGANIC GROWER SUMMIT™

Presented by **Western Growers & OPN**



OGS 2023 was held **November 29-30** at the Hyatt Regency Monterey Hotel & Spa in Monterey, California. The sixth annual **Organic Grower Summit** provided information vital to organic growers and producers, including an overview of the opportunities and challenges in the production of organic fresh food, the value of AI, updates on the SOE rule, and methods to creating a sustainable pest management future for organics.

The sold-out OGS trade show floor featured soil amendment, ag tech, food safety, packaging, and equipment exhibitors who had the opportunity to connect with organic field production staff, supply chain managers, pest management advisors, and food safety experts. Among the highlights of OGS were the Grower Roundtable keynote, the presenting of the Grower of the Year award to Rod Braga of Braga Fresh, and the expansion of the Ag Tech and Innovation Area. The organic fresh food industry continues to evolve rapidly, with tremendous strides in ag technology, investment, sustainability, and regenerative farming.



It's enthusiastic to see the crowd and to see the advancement in the organic product. I go through these aisles, and I see more products. I use a lot of them, and it's just nice to be able to relate to them all and see the new things that are coming.

Melvin Larussa
Owner
Clearview Orchards

.....

The conversations have been flowing. We have been approached by numerous other companies as well, interested in our services and bringing their products to California. We plan to come back to OGS next year. It's one of our staple events, and we like being here. We have an organic line that we want everyone to know about.

Aaron Echavarria
Representative
Custom Ag Formulators

OGS is an opportunity for us to get in touch with organic growers. They are becoming a more and more important part of our overall sales program.

Bob Sutton
Owner
Sutton Ag Enterprises

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OGS went very well for us. We had not been to the show before, and we have a couple of large clients here. The conversations with attendees have been fantastic. It's been a very good show for us.

Richard Quinlan
Director of Technical Services
IEH Laboratories

There's always new ideas about new innovations in agriculture [at OGS], and I actually find it really invigorating to be with other people. You can get very isolated out on your farm, and when I am around other people growing organic produce, it reenergizes me and gives me new ideas for the coming year and more hope. It's so exciting. You're out on your farm, and you just don't realize all of the things that are happening. So you come to an event like this, and you are like, wow, we work in a really cool industry.

Amy Kunug
General Manager
Southern Colorado Farms

NUTRIGANIC

INTRODUCING OUR SUSTAINABLE ORGANIC PRODUCT LINE FOR A GREENER FUTURE

NUTRIGANIC™ is a line of premium organic fertilizers from Nutrient TECH™. NUTRIGANIC products are made with the highest quality organic inputs. NUTRIGANIC products are concentrated nutrient suspensions developed using the same proprietary milling process for which Nutrient TECH is known. Nutrient particles are micronized to ensure maximum surface area coverage for improved uptake by the plant.



The NUTRIGANIC™ Product Line Includes:

	N	P	K	Mg	Ca	S	Zn	Mn	Fe	Cu	B	Mo	Co	+	lbs./gal
NUTRIGANIC B-17 Boric Acid Spray	0	0	0	-	-	-	-	-	-	-	17	-	-	OI	25/bag (dry)
NUTRIGANIC Calcium	0	9	0	-	8	-	-	-	-	0.25	0.25	-	-	OI	10.2
NUTRIGANIC Green Season Blend	0	5	2	0.5	4.5	2	2	1	1	0.25	0.25	-	-	OI	11
NUTRIGANIC Magnesium	0	5	0	4	-	-	-	-	-	0.25	0.25	-	-	OI	12.1
NUTRIGANIC Manganese	0	6	0	-	-	-	-	6	-	0.25	0.25	-	-	OI	11.5
NUTRIGANIC Zinc	0	6	0	-	5	1	10	-	-	0.25	0.25	-	-	OI	10.8

For more information contact your PCA or visit www.Nutrient.TECH



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The Cuesta Family, banana farmers and members of AsoGuabo Co-operative
equalexchange.coop/produce

A person wearing a red and black plaid shirt, blue jeans, and dark rubber boots is standing in a field of green plants. They are holding a woven basket in their right hand. The background is a blurred field of similar plants.

Trade Organizations & Associations

Working Together

The organic fresh produce industry is fortunate to have the support of numerous trade associations and organizations helping to protect the integrity of the organic brand and providing information, education, and guidance for all facets of the trade. Working together to encourage and strengthen organic farming practices while advocating for the positive environmental and nutritional attributes of organic fresh produce to consumers across the globe, these organizations share some of the work they're doing to help grow the organic industry.



BEYOND BUZZWORDS:

How organic and regenerative agriculture can build a better world

We are at a unique moment to promote transformative farming practices. Ecologically minded farmers have been using “regenerative” and “organic” practices long before these were buzzwords, and these same practices hold the keys to creating a healthy future. The following three points highlight why organic IS regenerative:



Organic Agriculture Supports a Resilient Planet

Climate-Friendly

Nearly 90% of organic farmers enhance resilience and fertility through cover crops, crop rotation, and green manures.

Healthy Soils

Organic standards mandate diversified crop rotation, cover cropping, and careful nutrient management for soil health.

Biodiversity

Organic farms foster higher species richness and abundance rates than conventional systems.

System-Focused

Organic production emphasizes overall system health, including clean air, water, and soil.

Organic Agriculture Builds Healthy Communities

Economy

Organic farms and businesses create jobs across the supply chain, and in 2023, total organic sales were a record \$67.6 billion.

Safer

Organic farms prioritize natural inputs, protecting farmworkers and agricultural communities from exposure to toxic chemicals.

Better for Animals

Organic farming practices lead to fewer antibiotic-resistant microbes and safer meat products.

Organic Agriculture is Trustworthy

Third-Party Certified

Organic farming undergoes rigorous certification, ensuring accountability and integrity.

Tried and True

Organic agriculture has evolved over decades, incorporating experience and continuous improvement.

Evolving and Improving

Organic standards are designed to adapt and respond to changing needs.

Regenerative Organic Agriculture with Rodale

Rodale Institute confronts one of the world's greatest challenges: creating a resilient global food system that improves human health and the environment. Our mission is to advance groundbreaking research and best-in-class education that enables farms and farmers to transition to **regenerative organic** agricultural practices, thereby improving the health of the world's soil and securing the global food supply.

Rodale Institute envisions a changed world where agricultural products are produced in a regenerative organic manner and the metrics of success are measured against the health of people and the planet.



Strengthening Organic Enforcement with CCOF

In 2023, CCOF proudly celebrated our 50th anniversary, commemorating a half-century of advancing organic agriculture through organic certification, education, advocacy, and promotion. We look forward to another 50 years (and beyond) of making organic the norm!



Over the past year, CCOF unveiled an educational series for organic producers and handlers preparing to meet the USDA requirements for the new **Strengthening Organic Enforcement** rule, which has a compliance deadline of March 19, 2024, and is designed to safeguard confidence in organic products and minimize fraud throughout the organic supply chain. CCOF's virtual office hours, infographics, and instructional videos in Spanish and English aimed to prepare our current and prospective members to meet the new standards smoothly and with minimal business disruption.



ORGANIC POTATOES

EarthFresh offers exclusive potato varieties that grow very well in organic conditions – looking and tasting better than traditional varieties.



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Organic Envy™ Shoppers are Valuable to a Retailer

-  Visit the grocery store more often
-  Spend more \$ in each trip
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Numerator Insights - Total Commerce - Shopper Comparison - L12 months thru 12/31/23



Learn More at envyapple.com



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Organic Produce Summit

*The only event dedicated exclusively to bringing together
producers and buyers of the organic fresh produce industry.*

**July
10-11
2024**

Monterey Conference Center
organicproducesummit.com



Presented by **Western Growers & OPN**

*Connecting organic growers and producers with
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**December
4-5
2024**

Hyatt Regency Monterey
organicgrowersummit.com