

# STATE *of* ORGANIC PRODUCE

2020

PRESENTED BY ORGANIC PRODUCE NETWORK







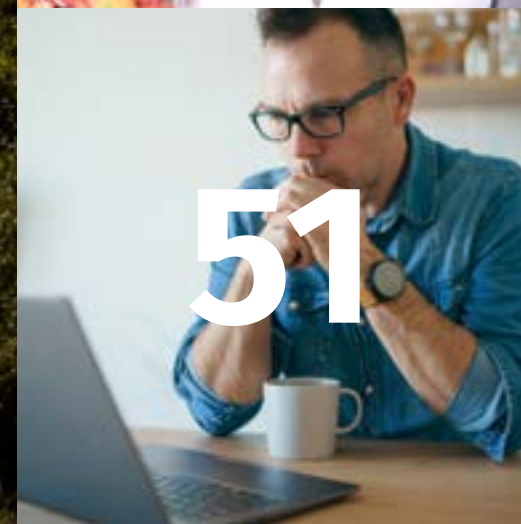
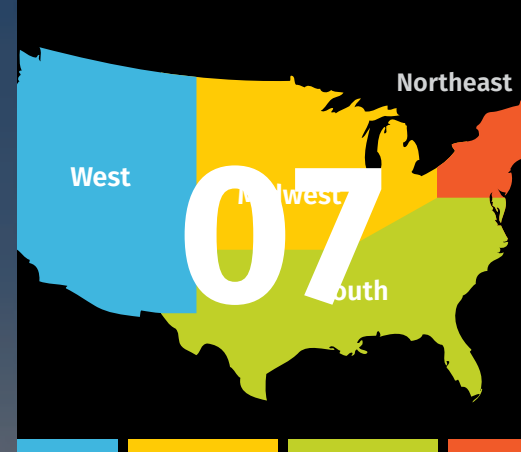
*Citrus | Blueberries | Tree Fruit | Grapes*

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Sharing a healthy future



## ***“It was the best of times, it was the worst of times”***

is the opening line of Charles Dickens's classic novel *A Tale of Two Cities*. It was written to suggest a period when opposite circumstances were taking place simultaneously.

And it's an apt characterization of what we've seen in the organic produce industry over the past year.

Faced with a worldwide pandemic, we have witnessed the destruction and devastation of human life, businesses, and our national psyche. Yet at the same time, our industry is thriving. Phenomenal growth and greater opportunities abound for us to supply nutritious, wholesome products across the globe.

Repeatedly, and without wavering, our industry has stepped up to the challenge of providing healthy organic fruits and vegetables to consumers—no exceptions. From the outset of the pandemic, growers, wholesalers, retailers, and allied members of our industry have stood strong on the front lines, feeding our nation. This is who we are and what we do—and what we will continue to do in the years ahead.

We want to thank all of you who have been a part of keeping the organic supply chain moving. This past year may be remembered as one of the darkest our nation has ever experienced, but your hard work, dedication, and unwavering commitment to providing healthy organic products to consumers never stopped—and we are all the better for it.

Be well. Be safe. And to a future that is the “best of times” for all of us.

**Tonya Antle & Matt Seeley**

# Welcome

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## Sales and Performance Overview







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## Organic Produce Sales up 14.2 Percent in 2020, Topping \$8.5 Billion



*All data & information  
provided exclusively by Category Partners*

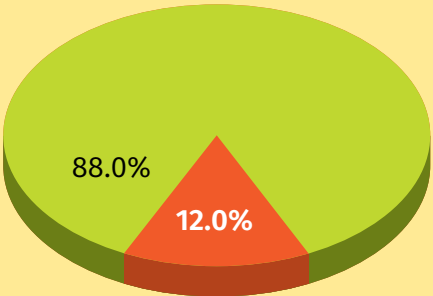


With conditions unlike any ever experienced in the history of the modern era of grocery retailing, total organic fresh produce sales for the past year topped \$8.5 billion. Unprecedented consumer purchasing behavior—due to the COVID-19 pandemic—resulted in double-digit growth over 2019. Working with Category Partners, the Organic Produce Network has highlighted the year-over-year growth of organic fresh produce compared to conventional, region-specific organic produce performance, the top 10 organic produce items (in both sales and volume), and the percentage change in year-over-year monthly produce sales for both conventional and organic.

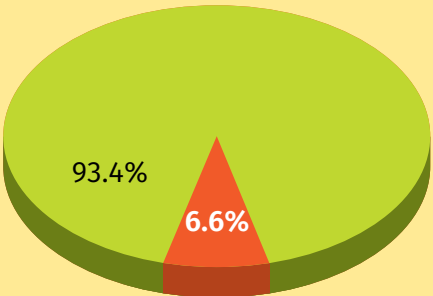


# Conventional vs. Organic

Organic produce outpaced conventional in terms of both year-over-year sales and volume growth in 2020. While conventional produce posted a sales gain of 10.7% and a volume gain of 9%, organic produce saw a 14.2% increase in sales and a 16% increase in volume.



● Conventional ● Organic



## Total Produce Share \$

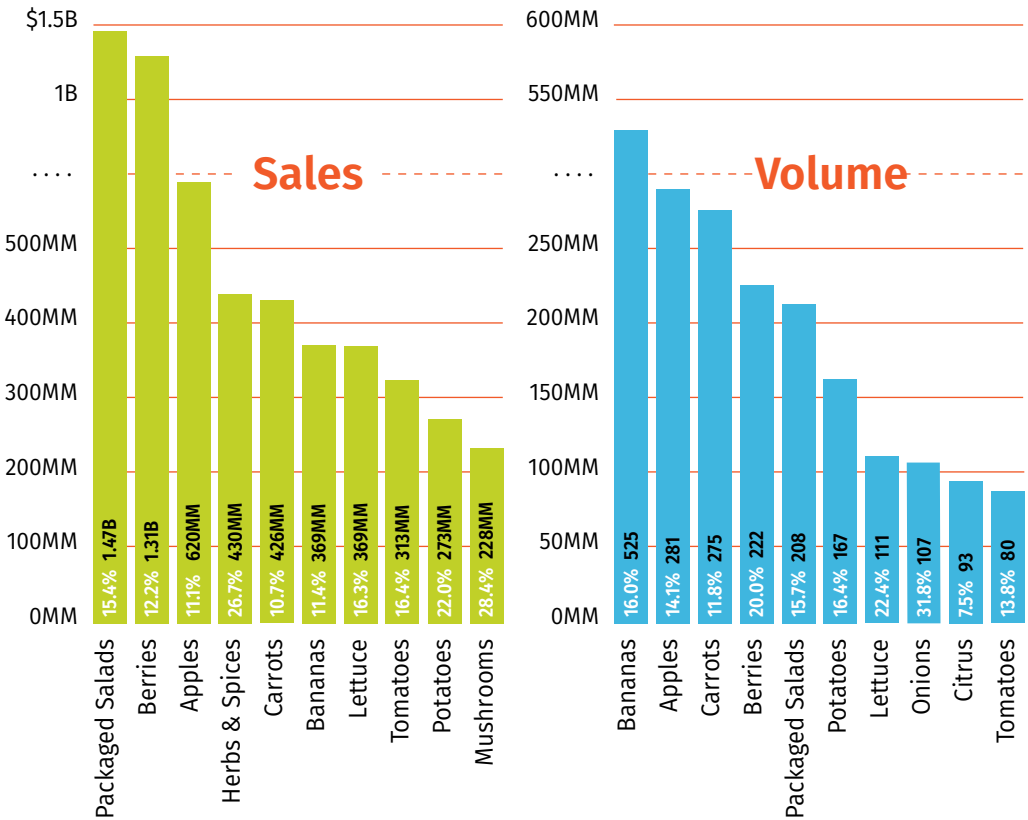
Total Organic Sales \$8,542,355,756  
Sales Change (YOY) 14.2%  
Organic Sales Share 12.0%

## Total Produce Share Volume

Total Organic Volume 2,960,917,571  
Volume Change (YOY) 16.0%  
Organic Volume Share 6.6%

# Top 10 Organic Categories

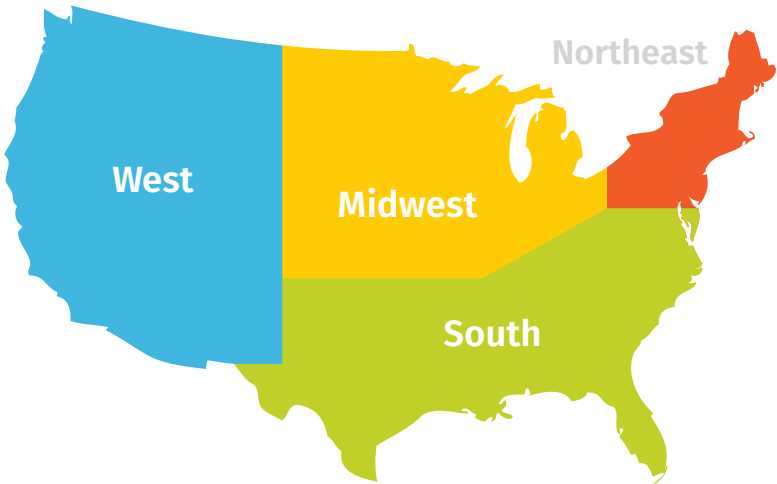
Packaged salads continued to be the largest driver of organic fresh produce dollars in 2020 with sales topping \$1.4 billion. Berries followed close behind with sales over \$1.3 billion, while apples took third place with sales of \$620 million. As usual, the banana category was the top-volume mover of the organic fresh produce sector, and it posted a sizable year-over-year volume increase of 16%.



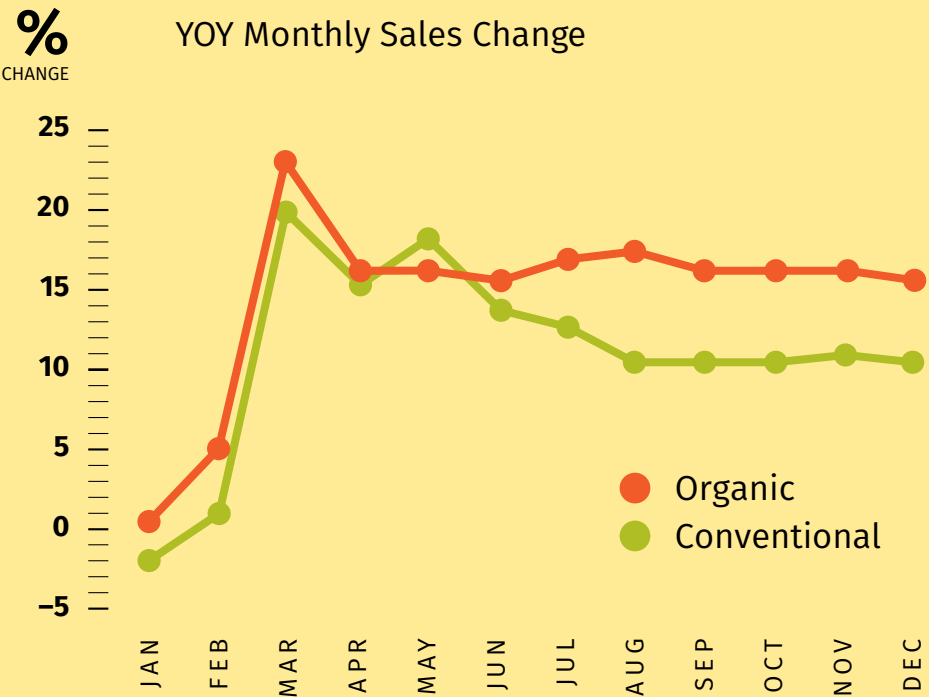
\*Dollar values have been rounded to the nearest million or 10 million

# Regional Organic Performance

All four regions showed double-digit year-over-year gains in both sales and volume in 2020. The largest sales growth was seen in the West (16.8%), while the most significant volume gain was found in the South (17.8%).



	West	Midwest	South	Northeast
Sales	\$2,657,742,219	\$1,322,277,258	\$2,590,938,231	\$1,963,175,634
Sales Change (YOY)	\$383,144,224	\$127,999,295	\$331,631,458	\$221,439,725
Sales % Change (YOY)	16.8%	10.7%	14.6%	12.7%
Volume	921,733,503	474,698,772	943,439,311	620,059,457
Volume Change (YOY)	137,106,272	50,760,477	142,561,028	77,844,975
Volume % Change (YOY)	17.4%	11.9%	17.8%	14.3%



# Year-Over-Year Percentage Change in Monthly Sales, Conventional vs. Organic

Throughout 2020, organic produce outpaced conventional in terms of year-over-year sales growth, except during the late spring when conventional growth briefly took the lead. Organic produce's strongest rate of sales growth compared to conventional occurred during the second half of the year.



# Meeting the Challenge together

all kinds of Good





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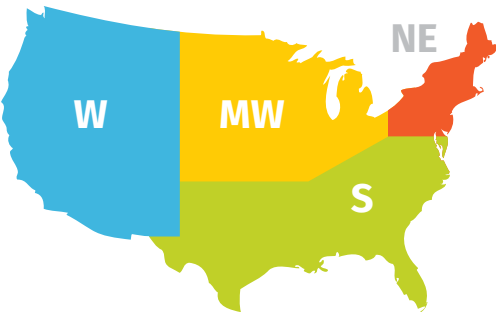
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## Leading Category Performers



# Apples



## Regional Performance

**Organic apples** performed most strongly in the South, with sales of more than \$211 million. That region also had the highest year-over-year increases in sales and volume (18.1% and 26.8%, respectively).

	W	MW	S	NE
<b>Sales</b>	\$172,179,454	\$93,762,088	\$211,105,600	\$141,968,100
Sales Change (YOY)	\$13,751,157	\$3,983,170	\$32,363,331	\$11,630,013
Sales % Change (YOY)	8.7%	4.4%	18.1%	8.9%
<b>Volume</b>	74,298,346	41,937,371	102,975,911	61,893,366
Volume Change (YOY)	5,370,567	958,668	21,780,747	6,527,609
Volume % Change (YOY)	7.8%	2.3%	26.8%	11.8%



Apples seem to be back on the shopping list for consumers, and we want to keep the organic apple category growing. It makes up 10% of the apple category on average in the U.S. and much higher for retailers who invest time and energy into organics. We want to keep helping customers grow their organic base, and do so through flavor and quality above all else.

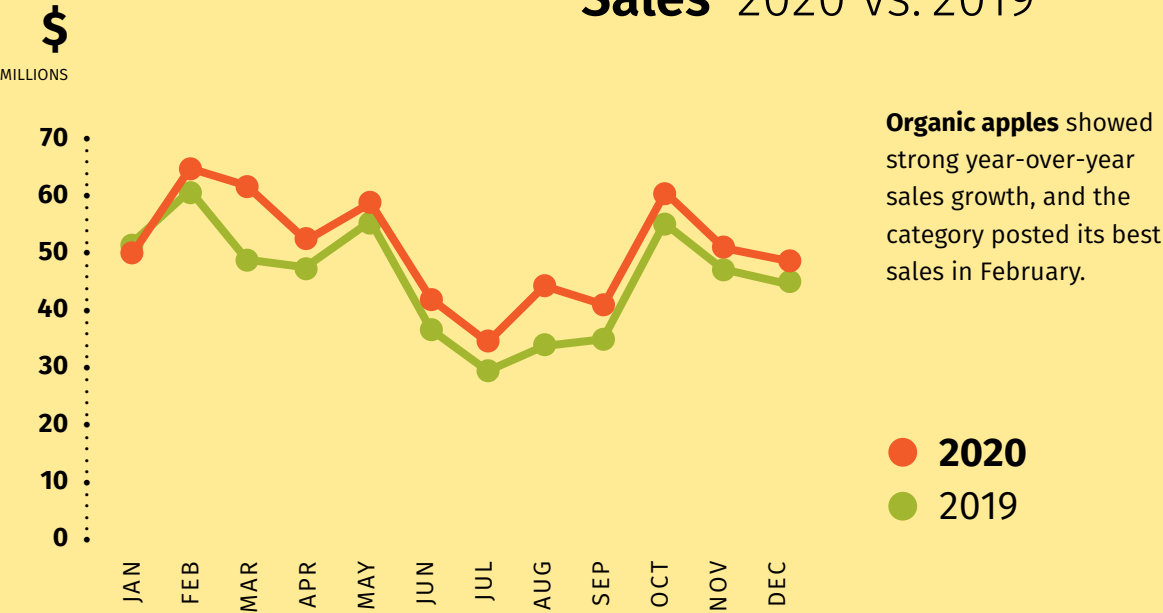
**Brianna Shales**  
Marketing Director  
Stemilt Growers LLC

-----

This season the biggest challenge has been to meet the needs of the market while protecting our employees. It's been incredibly difficult to keep the needs of providing a safe working environment on our packing lines, while responding to an incredibly volatile market. We've had some great success in limiting people in our buildings and expanding work hours to capture more of the day in shifts.

**Dan Davis**  
Director of Business Development  
Starr Ranch

## Sales 2020 vs. 2019



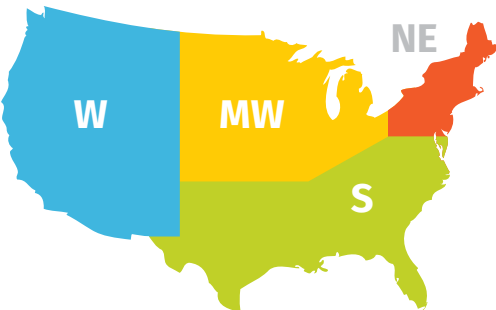
**Organic apples** showed strong year-over-year sales growth, and the category posted its best sales in February.

# Apples

With a 14.1% increase in volume and a 11.1% increase in sales, organic apples had a strong year. After the onset of COVID, bagged organic apples were in particularly high demand as consumers were drawn to bulk options and the perceived safety of packaged items. Throughout the year, organic apples had a price premium of 38% (compared to conventional), making them a solid driver of 2020 organic produce dollars.



# Avocados



## Regional Performance

Unsurprisingly, **organic avocados** had their highest sales in the West, but it was the Midwest region that showed the strongest year-over-year sales and volume growth at 27.1% and 32.8%, respectively.

	W	MW	S	NE
<b>Sales</b>	\$80,924,126	\$27,434,253	\$57,944,042	\$45,228,485
Sales Change (YOY)	\$9,601,856	\$5,851,769	\$3,979,608	\$7,801,313
Sales % Change (YOY)	13.5%	27.1%	7.4%	20.8%
<b>Volume</b>	23,077,492	8,451,343	17,666,778	14,750,870
Volume Change (YOY)	2,499,644	2,087,050	1,659,455	2,881,491
Volume % Change (YOY)	12.1%	32.8%	10.4%	24.3%



Even with all of the challenges that the year 2020 had to offer, it was generally a good year for organic avocados. Indicators from the most current available data show total U.S. organic avocado dollar sales increased by 17%, more than twice the 7% growth of conventional avocados. Unit growth was even higher, up 26% for organic and 19% for conventional avocados. In California, organic avocado dollar sales grew significantly, by 51%. California's avocado crop, both organic and conventional, was much larger in 2020 compared to 2019.

**Jan DeLyser**  
Vice President Marketing  
California Avocado Commission

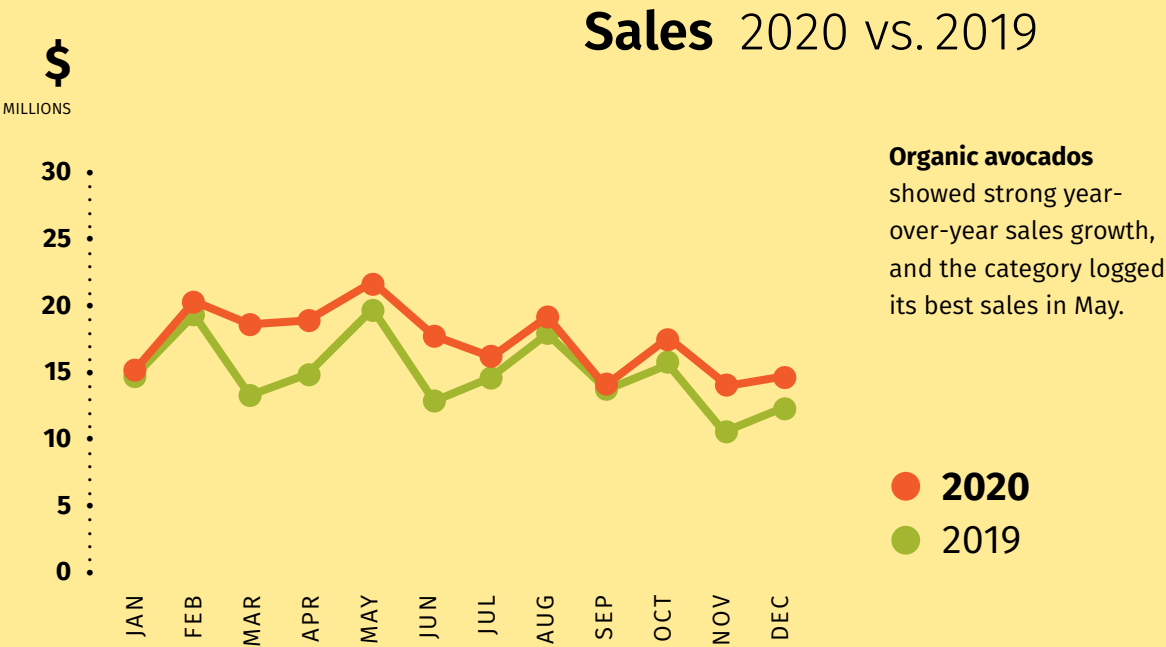
Millennials are conscious eaters and as they approach family life, we expect the demand for both organic and conventional avocados to continue forward into 2021 and beyond. In addition to this, avocado consumption in Asia and Europe is where the U.S. was 20 years ago. Millennials and shoppers in these countries are expected to fuel the popularity and growth of organic fruit.

**Stephen Fink**  
VP of North American Sales  
Mission Produce



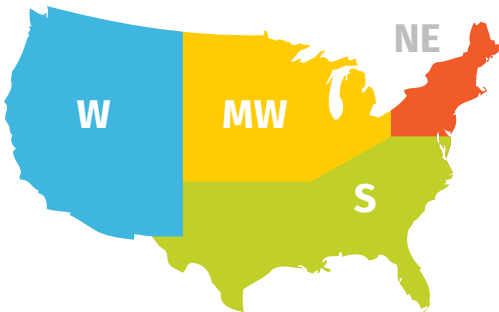
# Avocados

**B**oasting double-digit year-over-year gains in both sales and volume, organic avocados had a knockout 2020. With a 14.8% increase in sales and a 16.6% increase in volume, this millennial favorite shows no signs of slowing down.





Bananas



Regional Performance

Topping \$125 million, sales of **organic bananas** were highest in the South, while the West showed the strongest year-over-year sales growth at 12.8%.

<b>Sales</b>	\$116,483,543	\$61,651,042	\$125,187,536	\$66,182,167
Sales Change (YOY)	\$13,211,982	\$5,584,473	\$13,320,386	\$5,559,189
Sales % Change (YOY)	12.8%	10.0%	11.9%	9.2%
<b>Volume</b>	147,329,955	91,452,922	190,758,780	95,941,752
Volume Change (YOY)	17,424,930	12,623,266	30,880,824	11,451,584
Volume % Change (YOY)	13.4%	16.0%	19.3%	13.5%



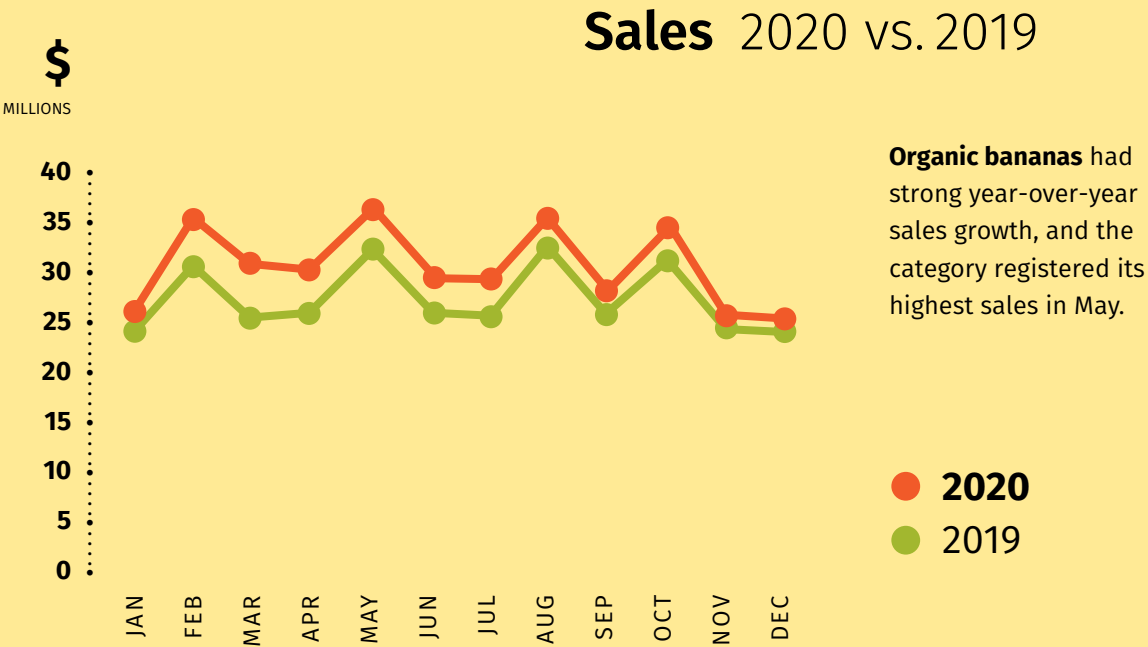
Because our customer base is so heavy into retail, March and April were big months for us. We sold record amounts of ginger, and demand was very heavy for garlic, along with “hardware” items like onions, potatoes, and yams. We also sold a significant amount of bananas. Our business increased by a large percentage, which is nice, but what’s been especially heartening for us to see is the way that our team has responded under really difficult circumstances so that we could remain open and serve our customers.

**Rick Lejeune**  
CEO and Co-Owner  
Heath & Lejeune

Customers have proven they are willing to pay more for organic produce. However, it is important to educate consumers, especially when it comes to price-sensitive staples like bananas, on the true, fair cost of the fruit that is produced and the impact their purchases have when they choose to support small growers and values-based, sustainable options.

**Mayra Velazquez de Leon**  
President  
Organics Unlimited

Bananas



The top-mover by volume in the organic fresh produce category, organic bananas showed double-digit year-over-year gains in 2020. With an 11.4% increase in sales and a 16% increase in volume, organic bananas continued to shine as a consumer favorite.





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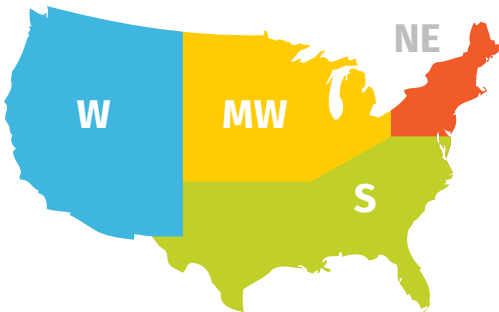
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Berries



Regional Performance

**Organic berries** showed an impressive year-over-year volume increase of 26.8% in the South, and the region also had the category's highest sales growth at 15.8%.

	W	MW	S	NE
<b>Sales</b>	\$389,888,143	\$193,760,185	\$373,410,231	\$351,462,854
Sales Change (YOY)	\$47,125,817	\$18,218,886	\$50,897,006	\$25,692,523
Sales % Change (YOY)	13.7%	10.4%	15.8%	7.9%
<b>Volume</b>	63,416,873	34,023,206	65,186,421	59,133,404
Volume Change (YOY)	10,371,610	5,342,336	13,786,798	7,421,389
Volume % Change (YOY)	19.5%	18.6%	26.8%	14.3%

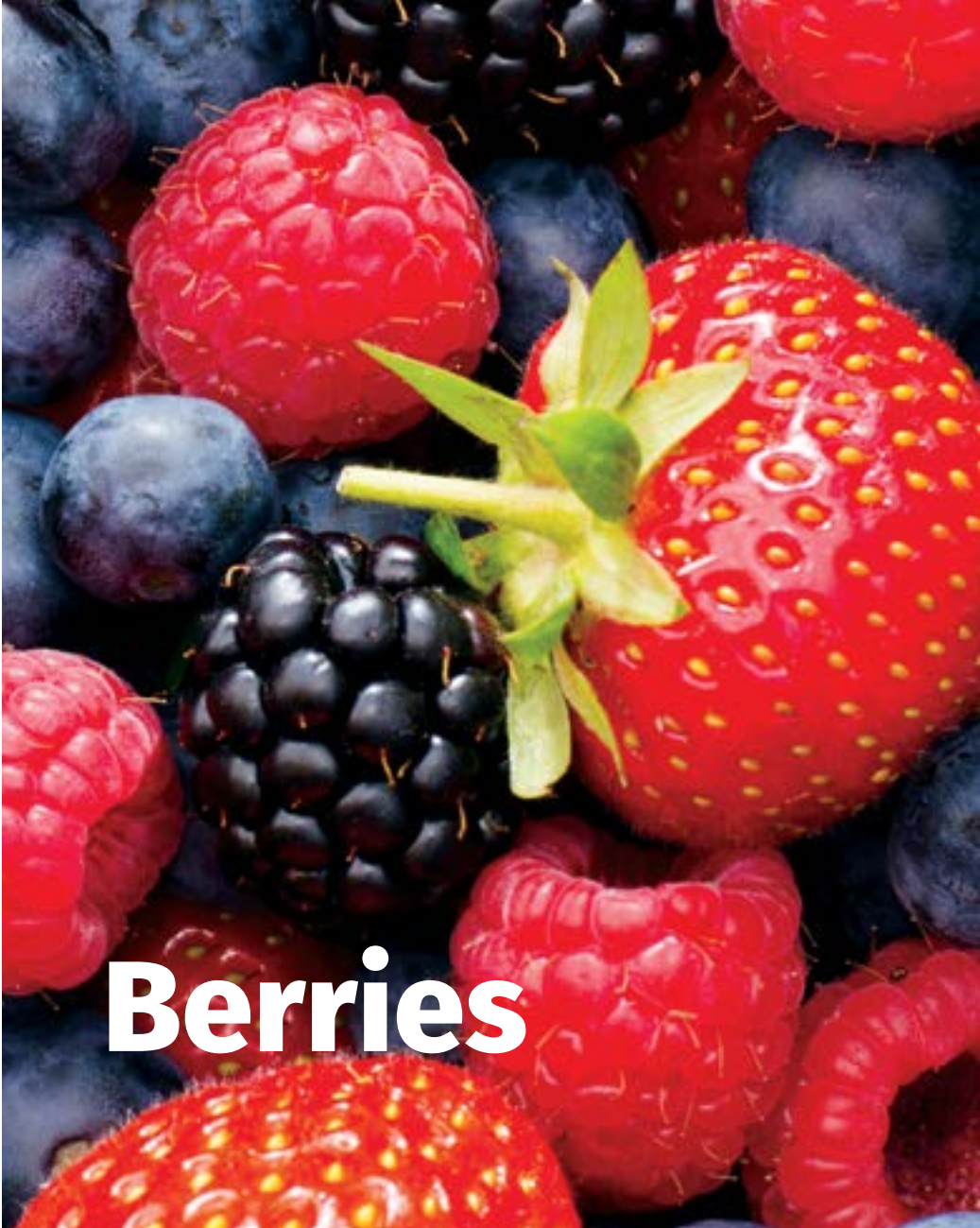


Retail demand for berries flourished through the various social distancing and shelter-in-place protocols associated with the COVID-19 pandemic, driving sales and allowing for good pricing all season long. We believe there was a certain focus around individual healthy eating habits and overall living healthier due to the attention around the virus. And organics are another category driven by these ideas. Grocery delivery, hired shopper services, retail focus on safety all helped drive sales during the time.

**Thomas Smith**  
Director of Sales  
California Giant Berry Farms

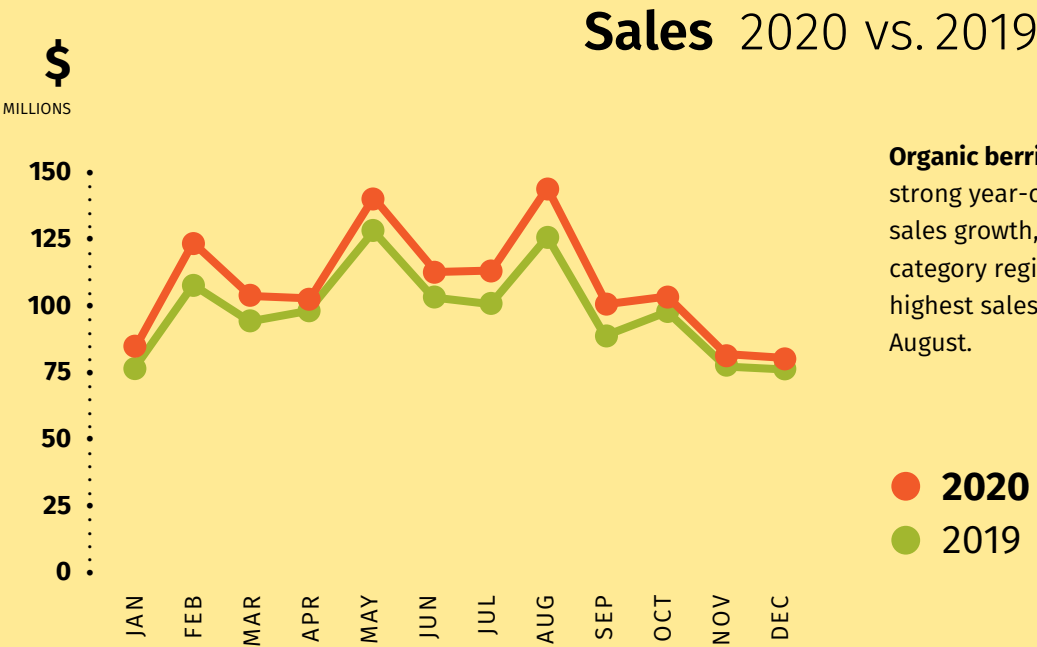
As lockdowns have eased, people have found a new normal. While there have been ups and downs, organic berry demand has actually been strong. While there is a lot of economic uncertainty, we think a couple of factors have played into this. Government stimulus has helped consumers retain their buying power and the shift from restaurants to eating at home also favors organic purchasing.

**Amber Maloney**  
Director of Marketing  
Wish Farms



Berries

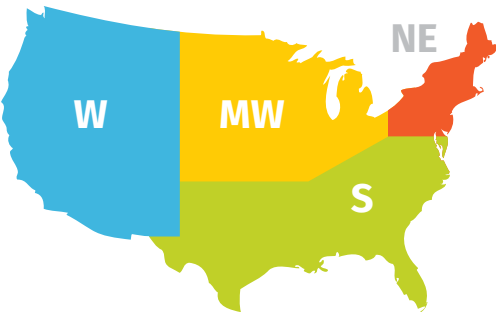
Organic berries showed exceptional year-over-year volume gains in 2020 as consumers continued to flock to the category that includes strawberries, raspberries, and blueberries. The second-largest driver of 2020 organic fresh produce dollars, organic berries saw volume increase by 20% and sales increase by 12.2%. The category had a wide range of price premiums in 2020, with organic strawberries commanding a 68% price premium over their conventional counterpart.



**Organic berries** had strong year-over-year sales growth, and the category registered its highest sales in late August.

● 2020  
● 2019





Regional Performance

**Organic citrus** performance varied widely across US regions, with the best year-over-year sales and volume growth seen in the West (30.1% and 30.0%, respectively). The Midwest was the weakest region for organic citrus, showing year-over-year declines in both sales (-7.4%) and volume (-13.3%).

	W	MW	S	NE
<b>Sales</b>	\$71,845,693	\$30,955,316	\$67,005,355	\$53,207,751
Sales Change (YOY)	\$16,910,344	\$(2,470,845)	\$4,876,422	\$8,933,057
Sales % Change (YOY)	30.1%	-7.4%	7.8%	20.2%
<b>Volume</b>	31,468,897	14,513,443	28,502,448	18,874,207
Volume Change (YOY)	7,187,424	-2,221,306	-310,403	1,897,527
Volume % Change (YOY)	30.0%	-13.3%	-1.0%	11.2%



Covid has pushed our business through the roof, organically and conventionally. Citrus is our business and the health and Vitamin C [trend] obviously made our commodity a major player this year, even over veg and berries.

**Brian Douglas**

Sales  
Corona-College Heights  
Orange & Lemon Association

As the reality of the pandemic grew so did the demand for organic fresh produce. We saw retailers and consumers purchase more immune-boosting items like citrus, mushrooms, ginger, spinach, berries and fruit. There was a real hesitance to purchase any produce coming into the U.S. from China. Additionally, we saw the demand for pre-packaged produce increase in order to reduce the amount of handling by packing teams, store staff and consumers.

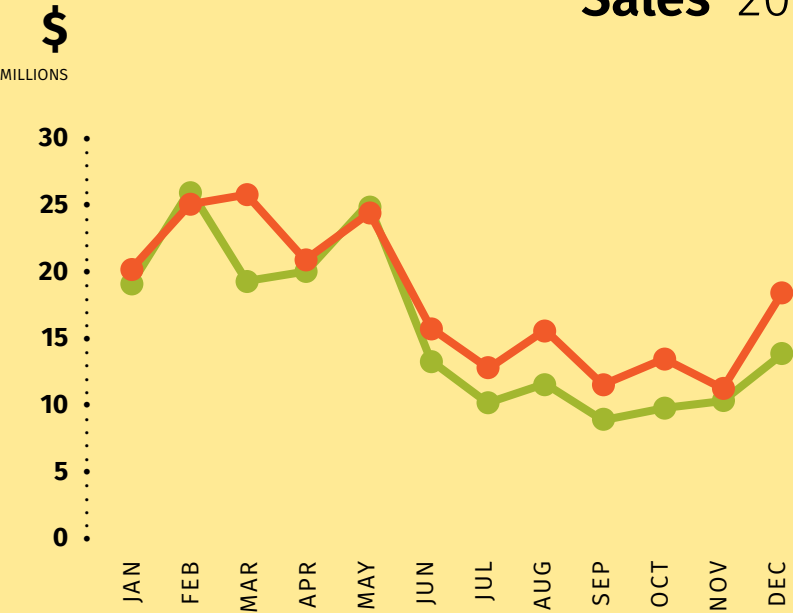
**Ginny Williams**

Senior Business  
Development Manager  
Four Seasons Produce, Inc.

Citrus

Organic citrus was in high demand in 2020 as consumers sought Vitamin-C-rich foods to help boost their immunity. The overall category increased year-over-year sales by 14.5% and volume by 7.5%. During the first quarter, mandarins showed exceptionally strong year-over-year performance, nearly tripling in both sales and volume, suggesting that consumers have a newfound love for organic specialty citrus.

Sales 2020 vs. 2019

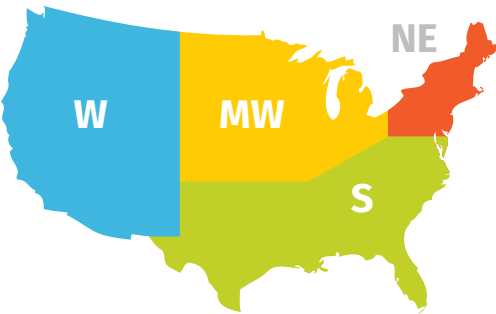


Overall, **organic citrus** showed solid year-over-year sales growth, and the category had its strongest sales in late March about two weeks after the coronavirus was declared a national emergency.

● 2020  
● 2019



# Grapes



## Regional Performance

While **organic grapes** declined in terms of both sales and volume in most regions, the West eked out a 1.9% year-over-year sales gain and achieved a solid 8.8% volume increase.

	W	MW	S	NE
<b>Sales</b>	\$59,371,508	\$28,688,499	\$68,069,312	\$49,924,019
Sales Change (YOY)	\$1,133,644	\$(7,034,167)	\$(4,078,969)	\$(2,933,195)
Sales % Change (YOY)	1.9%	-20.1%	-5.6%	-5.5%
<b>Volume</b>	21,165,489	10,092,072	22,615,710	15,959,657
Volume Change (YOY)	1,707,241	-2,862,704	-2,662,291	-675,329
Volume % Change (YOY)	8.8%	-22.1%	-10.5%	-4.0%

“

We’re seeing continued growth and interest in all of the fruit categories. Anytime the focus is on health, we expect more and more people will reach for handful of grapes or blueberries as a snack rather than something more processed. We’re also very excited to see new growth in kiwifruit and a big immune-focused boost to the citrus category continue. Highly optimistic that we’ll continue to see growth and interest across the board.

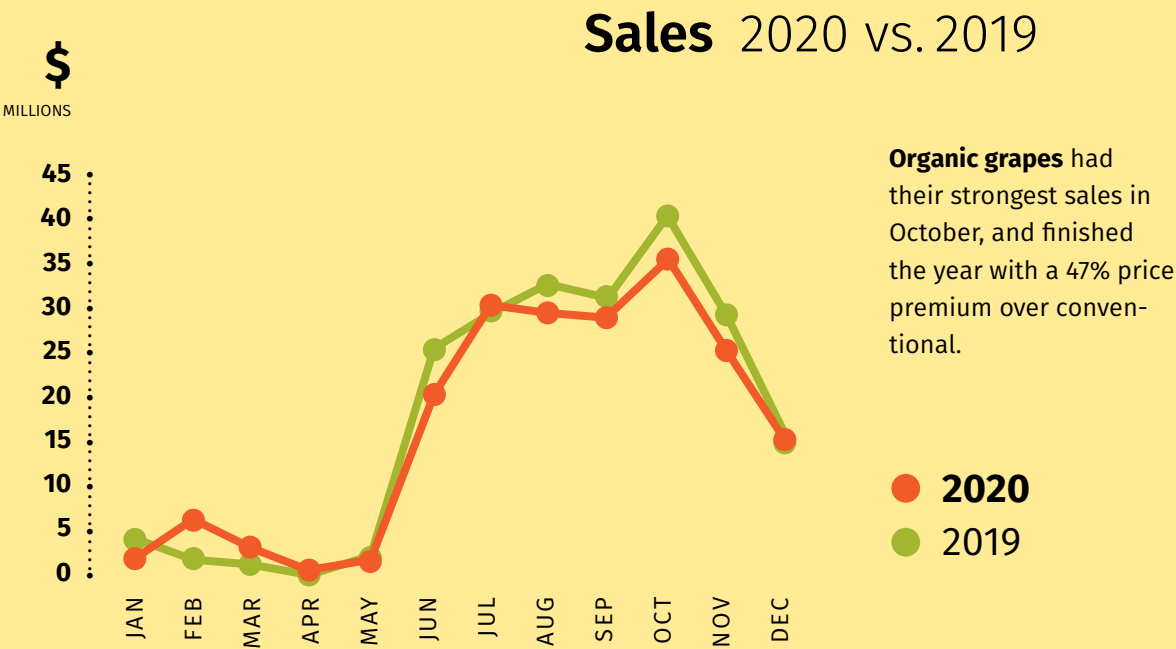
**Matt Landi**  
VP & General Manager  
Awe Sum Organics

When you step back and observe what we (and the world as a whole) have gone through, the ability for the organic produce supply chain to adapt to the ever-changing conditions of 2020 is a testament to the resilience of the industry as a whole.

**Cherie France**  
Marketing Manager  
Homegrown Organic Farms

# Grapes

Organic grapes lagged in 2020, both in terms of sales and volume, due to weather-related production issues. The category saw a –6.1% decline in volume and a –6% decrease in sales. Regardless of the year’s declines, organic grapes are popular with consumers, and as both domestic and South American supplies have grown more robust overall, promotional opportunities have become increasingly available.





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	DESCRIPTION	FOLIAR OR SOIL	RECOMMENDED APPLICATION TIMING	PRODUCT APPROVAL	SPECIAL FEATURES
<p><b>Nu-Film P</b> Spreader Sticker</p>	NON-IONIC ADJUVANT DESIGNED TO IMPROVE THE CONTACT, WETTING AND ADHESION OF AGROCHEMICALS ONTO THE PLANT SURFACE	FOLIAR	FULL SEASON	US	INCREASE EFFICACY OF BIOLOGICAL-BASED PESTICIDES AND FUNGICIDES
<p><b>C.F.O.</b></p>	PROPRIETARY BLEND OF ORGANIC ACIDS THAT SEQUESTER AND RELEASES SOIL NUTRIENTS WHILE LEACHING SODIUM AWAY FROM THE ROOT RHIZOSPHERE	SOIL	EARLY TO MID SEASON	US	SOIL APPLICATIONS DURING ENTIRE CROP CYCLE TO DISPLACE SODIUM AND INCREASE NUTRIENT AVAILABILITY
<p><b>BioVive</b></p>	UNIQUE BALANCED PROFILE BLEND OF VEGETABLE DERIVED AMINO ACIDS DESIGNED TO IMPROVE ROOT DEVELOPMENT AND CROP PROTECTION	BOTH	EARLY TO MID SEASON	US	ENHANCED CROP RESPONSE DURING ENVIRONMENTAL STRESS CONDITIONS
<p><b>CITOLEAF</b></p>	NATURAL SEA PLANT EXTRACT FERTILIZER WHICH IS FORTIFIED WITH PROPRIETARY YEAST EXTRACT TO STRENGTHEN CROP PLANT RESISTANCE OR RECOVERY	BOTH	EARLY AND MID SEASON	CA ONLY	ONLY CURRENT PRODUCT WHICH COMBINES A BIO NUTRITIONAL YEAST TECHNOLOGY WITH SEA PLANT EXTRACTS FOR ADDED PLANT RESPONSE
<p><b>Cytokin</b></p>	DESIGNED TO INCREASE CROP PRODUCTION EFFICIENCY INVOLVED IN ALL FACETS OF PLANT PHYSIOLOGICAL PRODUCTION PERIODS	FOLIAR	MID TO LATE SEASON	OUTSIDE OF CA	SPECIFICALLY DESIGNED TO INCREASE CELL DIVISION DURING FLOWERING STAGES

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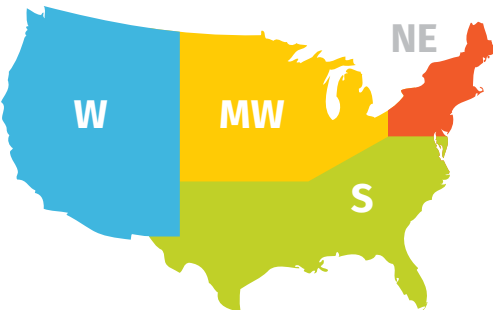
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# Herbs & Spices



## Regional Performance

Consumers in the Northeast showed a strong interest in experimenting with **organic fresh herbs and spices** in 2020, with the region registering a whopping 47.3% year-over-year increase in sales and a 43.0% year-over-year increase in volume.

	W	MW	S	NE
<b>Sales</b>	\$125,202,659	\$69,447,272	\$145,426,187	\$89,525,667
Sales Change (YOY)	\$24,264,725	\$8,682,117	\$28,895,911	\$28,735,297
Sales % Change (YOY)	24.0%	14.3%	24.8%	47.3%
<b>Volume</b>	28,561,050	11,575,030	22,078,906	16,383,047
Volume Change (YOY)	5,768,649	903,857	6,164,509	4,905,982
Volume % Change (YOY)	25.3%	8.5%	38.7%	43.0%



Our organic herbs (like many produce categories) have benefited from the significant rise in home cooking. We are seeing broad usage increases across our full line of herbs and stir-in purée varieties as more consumers learn and experiment with different flavors and forms. There’s a definite trend toward experimenting with new flavor varieties and combination, which we support and encourage in our consumer communications. It’s part of our mission to elevate the flavor and enjoyment of healthy food every day!

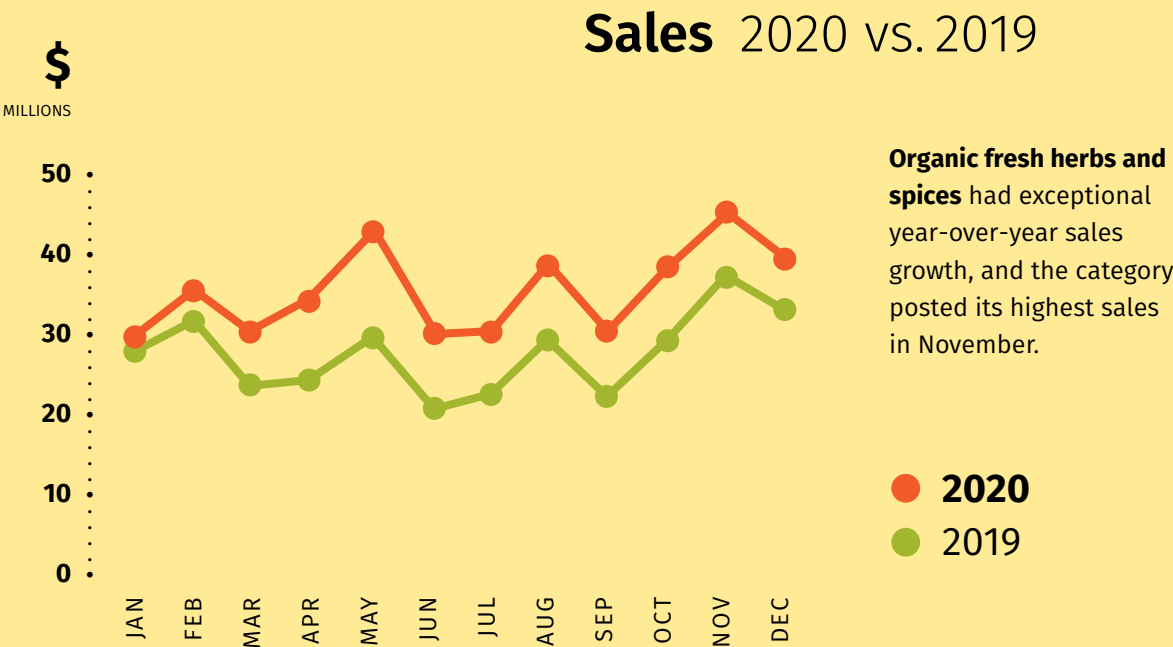
**Don Helms**  
Vice President of Marketing  
**Shenandoah Growers**  
(That’s Tasty)

We anticipate growing demand for organic tomatoes, peppers, and culinary herbs. People will continue investing in their health, home-cooked meals, and responsibly sourced food. It’s a little harder to project what to expect on the foodservice front, but we do believe markets will continue pulling out from the bottom of 2020.

**Aaron Brookes**  
Director of Sales and Marketing  
**Jacobs Farm Del Cabo**

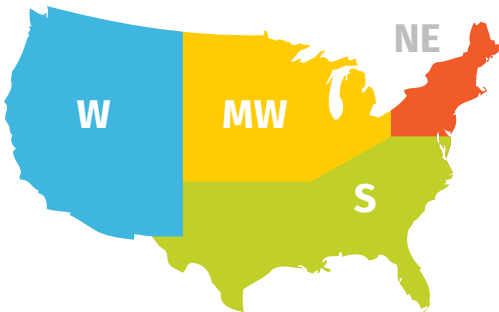
# Herbs & Spices

By all accounts, organic fresh herbs and spices had a blockbuster year. Logging sizable increases in both sales (26.7%) and volume (29.1%), organic herbs and spices were one of the best-performing organic fresh produce categories in 2020. Consumers sought out organic herbs and spices as the COVID-related shift to remote working and schooling meant more and more people were cooking at home.





# Packaged Salads



## Regional Performance

With upwards of \$476 million in sales, the South was the top-performing region for **organic packaged salads**, while the West showed the strongest year-over-year sales and volume growth at 21.2% and 20.8%, respectively.

	W	MW	S	NE
<b>Sales</b>	\$411,176,284	\$261,663,955	\$476,770,548	\$316,910,263
Sales Change (YOY)	\$71,963,466	\$32,317,668	\$53,827,444	\$36,920,309
Sales % Change (YOY)	21.2%	14.1%	12.7%	13.2%
<b>Volume</b>	58,442,315	36,485,608	68,753,284	43,978,572
Volume Change (YOY)	10,054,562	4,557,233	8,376,144	5,198,452
Volume % Change (YOY)	20.8%	14.3%	13.9%	13.4%



The home delivery people buy quite a bit of organic produce—things like carrots and salad mixes (we have an array of Organic Girl salad mixes that sell extremely well). And then organic broccoli, organic celery, and other staples sell very easily.

**Patrick Ahern**

*Director of Procurement/Pricing and Administration*  
**Baldor**

The biggest challenge [of 2020] is the most obvious—dealing with COVID and trying to figure out volume needs. The biggest opportunity happens to also be due to COVID. Our retail organic salad packs have seen a tremendous increase due to retail movement.

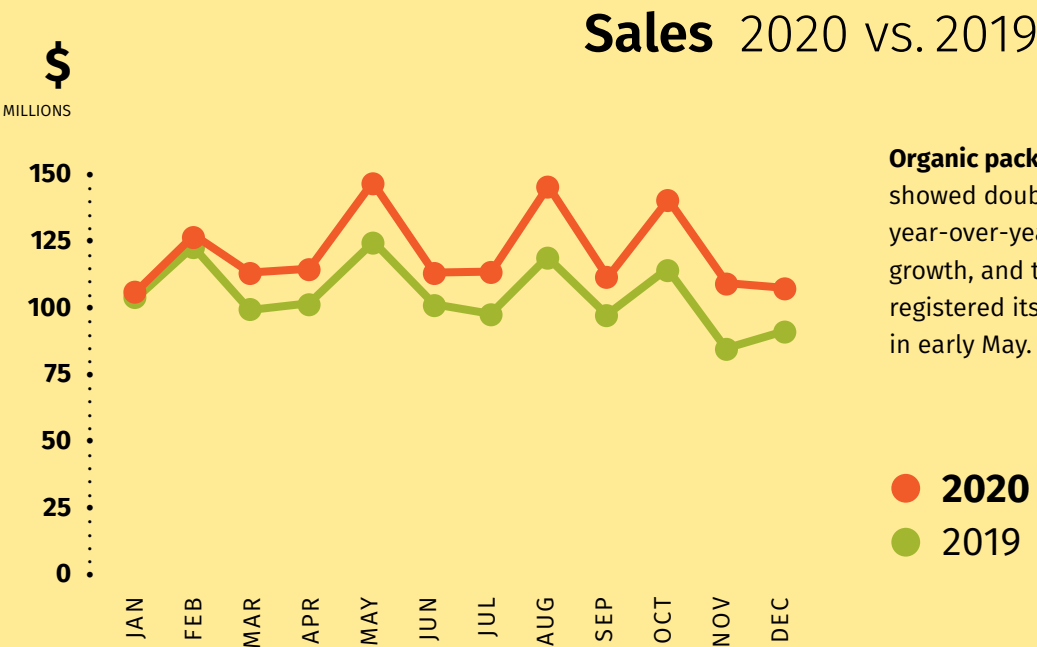
**Dan Canales**

*SVP of Sales, Marketing and Processing*  
**Ippolito International**

# Packaged Salads



The largest contributor to organic fresh produce dollars, organic packaged salads generated sales of nearly \$1.5 billion in 2020. The category also showed strong year-over-year volume and sales gains of 15.7% and 15.4%, respectively as salad bars closed and consumers ate more meals at home. With a consistently high price premium of around 80% (compared to conventional), organic packaged salads are a great way to drive produce sales.

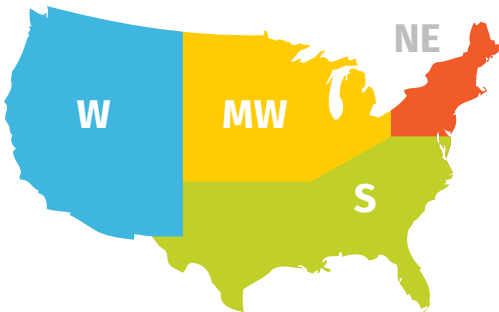


**Organic packaged salads** showed double-digit year-over-year sales growth, and the category registered its best sales in early May.

● **2020**  
● **2019**



Potatoes



Regional Performance

**Organic potato** sales were highest in the West at more than \$87 million, with that same region also seeing the largest year-over-year increases in both sales and volume (27.5% and 21.2%, respectively).

<b>Sales</b>	\$87,261,225	\$37,848,574	\$83,257,486	\$64,617,204
Sales Change (YOY)	\$18,846,730	\$4,954,140	\$15,536,875	\$9,933,509
Sales % Change (YOY)	27.5%	15.1%	23.0%	18.2%
<b>Volume</b>	52,198,397	26,036,829	53,492,257	35,415,957
Volume Change (YOY)	9,124,114	2,218,604	7,454,786	4,827,357
Volume % Change (YOY)	21.2%	9.3%	16.2%	15.8%

“

When the “pandemic” initially hit, the CV [conventional] supply source could handle the increased demand when shoppers who had never purchased staples such as: apples, carrots, potatoes, etc began to stock up with what they viewed as an uncertain future. Most OG [organic] suppliers could not take on this additional volume.

**Kurt Kistler**  
*Manager*  
**Charlie’s Produce Company**

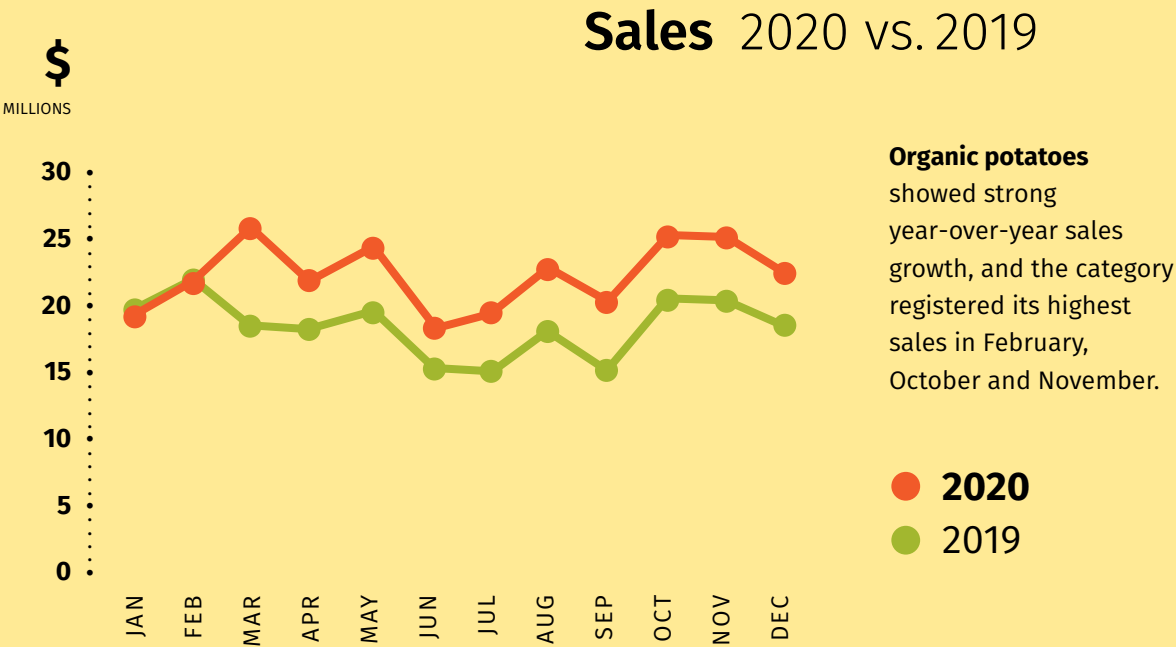
Moving into the new year, we look forward to continuing the growth of our full line of 65 organic vegetables and releasing new products that provide consumers with time-saving, value-added solutions. While we produce organic vegetables year-round and see demand for our varieties across the board, we look forward to growing our organic carrot, potato and onion programs which represent top-volume items within the organic category.

**Eric Proffitt**  
*Senior Vice President,  
Sales and Marketing*  
**Grimmway Farms**



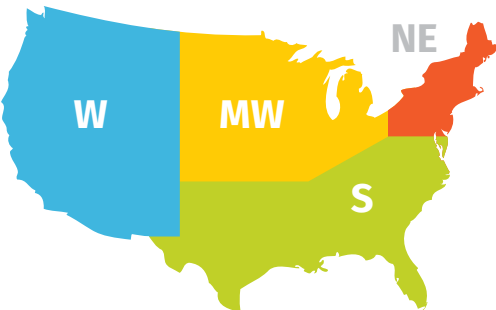
Potatoes

Due to changes in consumer buying habits, organic potatoes earned some well-deserved time in the spotlight in 2020. This humble staple vegetable enjoyed a 22% year-over-year increase in sales and a 16.4% year-over-year increase in volume as consumers sought out healthful produce items. With an impressive price premium of 101%, organic potatoes were a strong driver of 2020 produce dollars compared to their conventional counterparts.





Tomatoes



Regional Performance

The West had the highest **organic tomato** sales at about \$109 million, and it also showed the largest year-over-year sales growth with an increase of 18.9%.

	W	MW	S	NE
Sales	\$109,647,827	\$43,802,943	\$89,507,143	\$70,033,930
Sales Change (YOY)	\$17,419,392	\$5,704,095	\$11,430,278	\$9,453,189
Sales % Change (YOY)	18.9%	15.0%	14.6%	15.6%
Volume	27,188,783	11,670,215	23,999,912	17,030,281
Volume Change (YOY)	3,398,621	1,093,515	2,929,885	2,215,371
Volume % Change (YOY)	14.3%	10.3%	13.9%	15.0%

“

Consumer alarm in reaction to the pandemic created extraordinary increases in basket size, stockpiling of goods and over-buying in general. While that meant increased organic sales for our business it taxed our systems, especially as we headed into the spring and summer which are historically higher-volume months. The consumer move to more organic was evident as they looked for a healthier lifestyle as a way to combat the Coronavirus. Sustained business, even today, requires labor resources that remain scarce in order to move cases through our warehouse as effectively and quickly as possible.

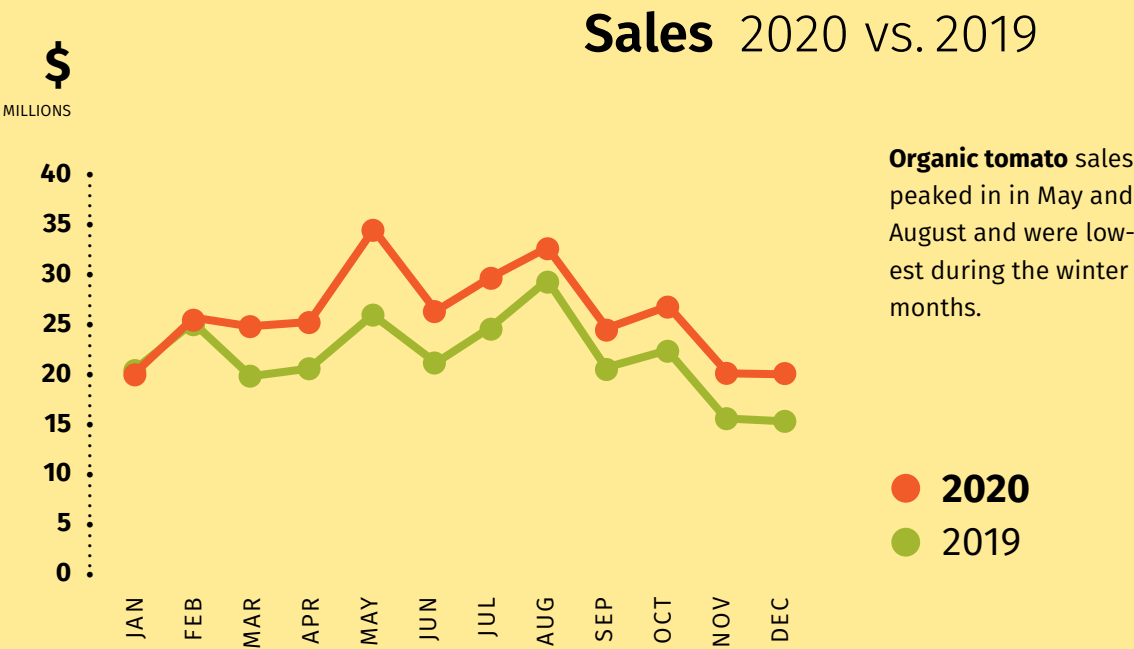
**Ginny Williams**  
Senior Business  
Development Manager  
Four Seasons Produce, Inc.

We really like to understand what growers grow best. For example, if a particular grower does a really good job with heirloom tomatoes in July and August, we'll forecast what we expect to sell. Then we build a campaign around promoting those tomatoes and that grower during that time of year. Having a very close relationship with our growers is critical.

**Karen Salinger**  
Co-Owner and Sales Director  
Veritable Vegetable

Tomatoes

Organic tomatoes continued to be a powerhouse category for the organic fresh produce sector in 2020. With a 16.4% increase in sales and a 13.8% increase in volume over the prior year, organic tomatoes showed that they're still top of mind for many consumers. Organic specialty tomatoes (heirlooms, Early Girls, grapes, Romas, etc.) have become increasingly popular in recent years, and this trend is expected to continue.







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**ORGANICS ARE BREAKING RECORDS, ARE YOURS?**



## Almond Study

*In this study, **PureCrop1** increased yield and decreased offgrade significantly, with results further improving over time.*

*In the 2019 and 2020 seasons, PureCrop1 was used throughout the cycle.*

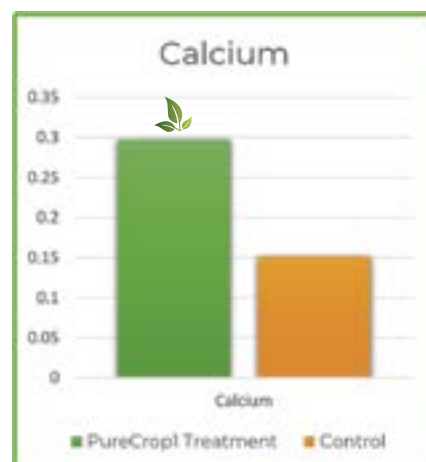
*PureCrop1 was not used in 2018.*

## Nectarine Study

*This 2020 study demonstrates PureCrop1's effect on California nectarines.*

*The test plot received a total of seven applications of PureCrop1 applied at 1% - 1.75% dilution.*

*Results show **PureCrop1** raised Brix levels, as well as calcium levels. View more trials on our website.*



In This  
Together





# Giving Back

While giving back has always been a part of the organic produce industry, the unique and challenging circumstances of 2020 kicked philanthropic efforts into high gear. Growers, distributors, and retailers made large donations to food banks, schools, hospitals, and many other organizations that serve those in need. The organic produce industry also gave special recognition to frontline workers by donating fresh produce and other items to essential personnel in the health care and agricultural sectors.



**Sunkist Growers** donated fresh California lemons to hospitals in the Santa Clarita area in response to the COVID-19 pandemic. In total, they aimed to provide **260,000 pieces of fresh citrus** fruit to California schools, food banks, and hospitals.

**West Pak** donated **pallets of fresh avocados** to Feeding America Riverside/San Bernardino. “West Pak is giving back to our communities to help feed those in need in a time of crisis,” said West Pak CEO Mario Pacheco. “We have the ability to provide and the desire to step up where we can be most effective.”

**Bolthouse Farms** and Feeding America partnered to assist Bolthouse employees and local growing communities in California and Illinois. The programs included providing **food to employees and their families**, a donation matching program, as well as produce donations to local food banks, hospitals, and local resource centers.

**NatureSweet** donated over **1.3 million pounds of fresh produce** to food banks in the US and Mexico, as well as personal safety kits to its associates and local communities.

A food bank in Lawrence, Kansas was the lucky recipient of **over 1,200 cantaloupes** courtesy of retailer **Hy-Vee** and melon supplier **Sol Group**. This contribution was one of many in a series of donations to food banks among Hy-Vee’s eight-state area.

**IFCO** donated **600 RPCs** to Meals on Wheels that allowed volunteers to pack and deliver nearly 8,000 meals daily to home-bound seniors throughout the greater Portland-Vancouver metro area.

**Driscolls, Sunkist, Taylor Farms, Dole, Rainier, Wada Farms, Mann Packing, and Grimmway Farms** joined **PRO\*ACT’s** “Feeding Our Frontlines,” which provides **fresh produce to those on the front line of the pandemic**.

**Organically Grown Company** launched “Project HOPE” with the goal of donating fresh produce to those in need. Organic growers responded, donating **over 46,000 pounds of fresh fruits and vegetables** to Project HOPE (Healthy Organic Produce for Everyone). OGC distributed these donations to five Northwest hunger relief agencies, including the Oregon Food Bank and Northwest Harvest.

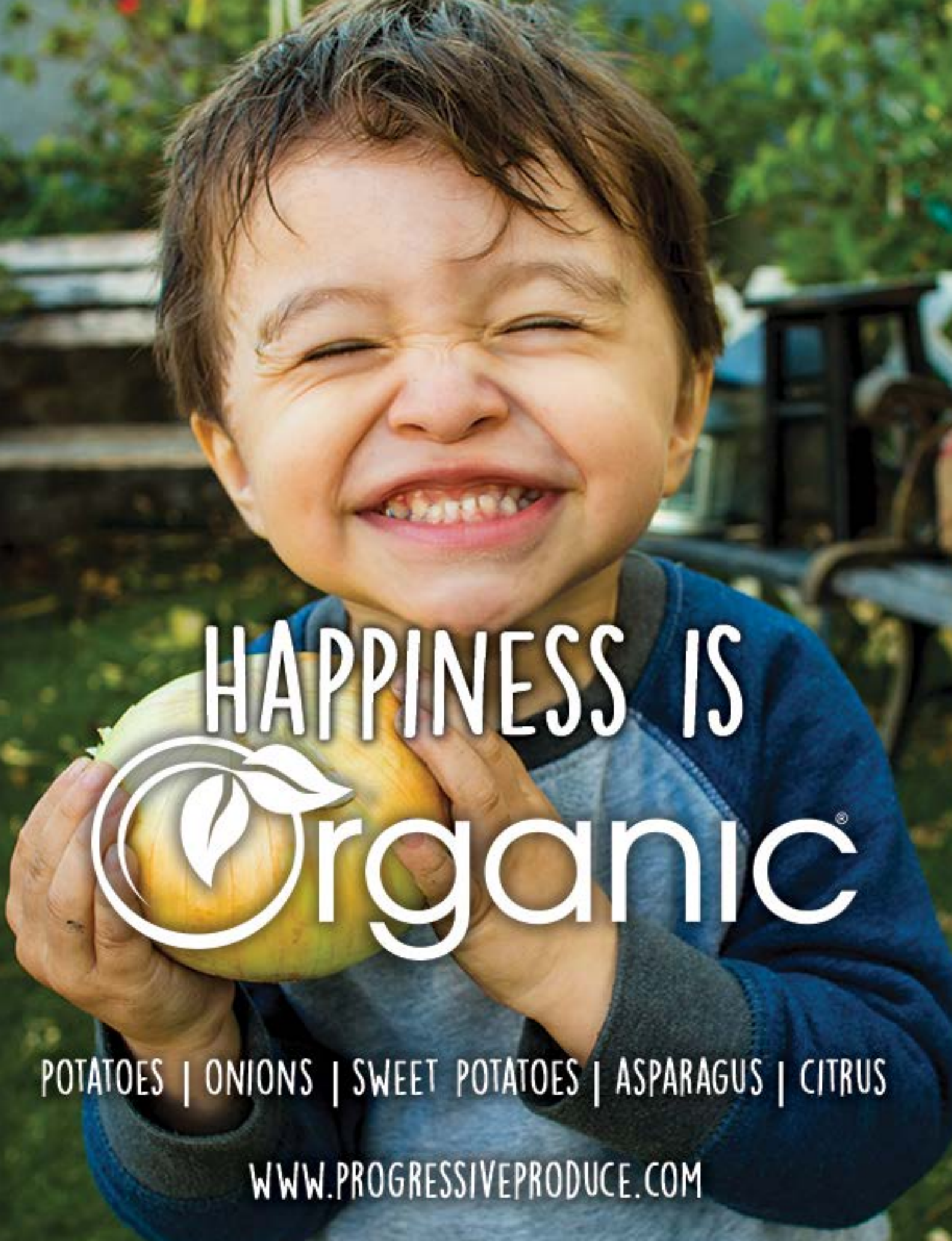
**Publix** launched an initiative to **support both farmers and families impacted by COVID-19**. In an effort to mend the fractured supply chain, Publix purchased produce and dairy from Florida farmers and donated these items to Feeding America food banks.

I have witnessed more grace, compassion, humility, and cooperation in the organic industry in 2020 than ever before. The responses to tragic circumstances have been overwhelmingly positive and reassuring that one person can make a difference.

**Scott Schultz**  
Director  
Pacific Coast Trading Co.







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**Retailer and  
Wholesaler  
Snapshots**



# Retailer & Wholesaler Snapshots

Retailers and wholesalers across the globe proved to be “frontline heroes” for consumers, providing them with consistent supplies of organic fresh produce despite the ongoing pandemic. With the closure of various foodservice channels, new distribution opportunities, like online food purchasing, flourished, resulting in a new and much different landscape for the future of grocery retailing.



We carry 25-30 organic SKUs on a regular basis. In fact, organics are the fastest-growing sector in fresh.

## Caitlin Tierney

Senior Director of Fresh  
99 Cents Only Stores



When 40 percent of all the food produced in the US goes uneaten, it is crucial for Imperfect to show up in every avenue possible to recover perfectly good food. As consumers continue to want and demand more as it relates to where their food comes from and how it is grown, organic produce plays an important role in making sure we're offering options for everyone to be involved in reducing food waste across the country.

## Ed O'Malley

Vice President of Supply  
and Merchandising  
Imperfect Foods



Organic produce continues to be a significant growth engine for us. We are bringing more stores onto our organic program, and velocity is accelerating across all the stores we service.

## Greg Kurkjian

Executive Vice President  
Castellini



We were at the ready with having that offering of buying products online. ... People that were wanting to stay safe and have the convenience and means by which to buy products online [could] ... trust ... the Instacart employees ... to pick up these items for them with confidence that they are going to deliver what they expect.

## Frank Padilla

Vice President and GMM,  
Produce and Meat,  
Costco





# Retailer & Wholesaler Snapshots



All retailers have a better sense of urgency and more respect for what the front

lines do. We are stronger as an industry than we were before this.

**Jim Donald**

*Co-Chairman*

**Albertsons Companies**



The whole Erewhon ethos is about empowering your body and eating foods

that will help you heal and keep your body in a state of homeostasis. Stress and inflammation is the root of a lot of health issues, so we try to create an environment where you have access to foods that are enzyme rich, vitamin rich, and nutrient dense—a lot of awesome plants! Your body's going to get most of what it needs through vegetables and fruits. Eating a very heavy plant-based diet is especially important at this time right now.

**Jason Widener**

*Vice President*

**Erewhon**



That first day when the national emergency was declared, I was having

stores calling me, saying, "We have nothing on our stands." Sales were out of control. But within 1-2 days, we were back up and running. And that had a lot to do with the support of our distributors—Heath & Lejeune, Albert's Fresh Produce, and Charlie's Produce. They really stepped up to keep our stores full of produce—they did a great job! They supported us in any way they could. All produce in Lassens is certified organic.

**John Odahara**

*Regional Produce and Bulk and Transportation Manager*

**Lassens Natural Foods and Vitamins**



Organics in general have obviously increased—and they've increased

drastically in the last five years. I think more and more people are starting to realize the benefits of organic. And the price difference isn't as big as it used to be, which is turning more people onto it. And I think once people get turned onto it, they're tasting how much better it is.

**Kevin Byers**

*Senior Produce Merchandiser*

**PCC Community Markets**



More than 85 percent of the produce we sell to consumers is organic. In recent

years, there's been a social movement of grow local and eat local, and that has definitely promoted the consumption of organic produce and built up a social consciousness about organic food. So there's a strong demand right now from consumers for organic produce.

**Mike Xu**

*Founder and CEO*

**GrubMarket**

“

**Communication is the main ingredient in leading during a crisis, and it is important to hear the leader's voice every day. Has communication improved during the pandemic? It has.**

**Jim Donald**

*Co-Chairman*

**Albertsons Companies**



We're ... seeing broader trends around the demand for more

tropicals, such as ginger, dragon fruit, galangal, and others, and culturally appropriate foods for the diverse communities we serve.

**Karen Salinger**

*Co-Owner and Sales Director*

**Veritable Vegetable**



Actually, because most of our organic business prior to the pandemic was geared

toward retail, and retail grocery business has expanded, we just grew naturally into selling more and more organic produce. So if we'd just been an exclusively organic company dealing with retail, I think we would've seen a bump in business and nothing else.

**Patrick Ahern**

*Director of Procurement/Pricing and Administration*

**Baldor**



“

Retailers can do organics better than anyone.

**Frank Padilla**  
*Vice President and GMM, Produce and Meat, Costco*



It's the growers that are the rock stars. We move boxes around in trucks and deliver them. The growers are the integral piece that makes everything that we do possible, and we pride ourselves on the relationships we have with them, and the trust that they have in us, and the trust that we have in them.

**Robert Lichtenberg**  
*Director of Purchasing Earl's Organic Produce*



A COVID-related challenge our produce departments have faced is that we are no longer able to use passive samples to drive impulse buys with our customers. To help overcome this obstacle, we have used more point-of-purchase information for our special items, and our team members do a great job on interacting with our customers through suggestive selling and personal recommendations.

**Ryan Peterson**  
*Produce Director Jimbo's*



Overall, we've seen a big step up in produce distribution during this time. People are looking to eat healthier—to eat more organic produce. And I think people are willing to spend up a little bit more if they perceive that the quality and the nutritional value are higher, and that has really helped us during this situation.

**Scott Wiggans**  
*Produce Director Lazy Acres Market*







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Aired July 8, 2020

## Real Talk with Jim Donald



**Jim Donald**

*President and COO,  
Albertsons Companies*

**Jim Donald** told an online audience in July that sales of organics were “screaming,” with the spike in at-home cooking pumping up a trend that was long in the making. He credited those on the front lines of both the retail and supply community with keeping the supply chain moving, while applauding the grower-shipper communities for providing fresh product on a steady basis during the pandemic.

.....

**“Brick and mortar remain as strong as ever, and we have shown that it can coexist with e-commerce.”**

Aired August 19, 2020

## What a Year It’s Been So Far... Organics in 2020



**Frank Padilla**

*Vice President and GMM  
of Produce and Meat, Costco*

As one of the nation’s largest retailers, Costco has publicly advocated for increased production of organic fresh produce items. It is the chain’s member-shoppers, however, who are driving organic sales growth as they vote with their dollars, according to **Padilla**. The Costco executive said pandemic conditions forced the retailer to be “nimble” as it worked with suppliers to meet unprecedented consumer demand.

.....

**“Some of the surprises included organic brussels sprouts, organic mushrooms and cremini mushrooms. ... These are the kinds of things that people are adding to their menus.”**



**Steve Lutz**

*Senior VP of Insights and Innovation,  
Category Partners LLC*

Organic produce sales continued to outperform conventional sales and volume growth within the produce category, driven by consumers across the category, **Lutz** said. In July, organic produce sales represented almost 12 percent of total produce sales, and as the price gap between conventional and organic produce narrows, organic sales will increase.

.....

**“We had double-digit growth of organic sales coming into the pandemic and have maintained double digit growth throughout.”**

**W**hile the Organic Produce Summit and the Organic Grower Summit were unable to be held in 2020, Organic Produce Network conducted a series of four virtual events featuring leadership from some of the major players in the organic fresh produce industry.

These online events covered a wide spectrum of topics and issues related to the state of grocery retailing during the pandemic and explored a myriad of subjects from all facets of the organic industry.

.....

To catch up with these virtual events, please visit our

**OPN Organics OnDemand  
YouTube Channel**



# Retailer Insights on Organics



**Stew Leonard**  
President and CEO,  
Stew Leonard's

The pandemic has been a boon for organic produce sales for his iconic seven-store chain, **Leonard** said. There has been a strong uptick in consumer interest in health and wellness this year, with foods with immunity-boosting properties performing particularly well.

.....

“With the pandemic hitting, people want to be ensured that their food’s cleaner, that it’s better, that it’s more wholesome.”



**Scott Schuette**  
Vice President of Produce and Floral,  
Fresh Thyme Market

Fresh Thyme’s mantra going into the new year is “we win 2021 with winning organic,” said **Schuette**. The Midwestern retailer, with 70 locations in 10 states, saw several organic items surge in popularity during the coronavirus crisis, and he expects this trend to continue into 2021.

.....

“Everything from packaged herbs, packaged salads, the new pouch bag of organic apples, and some of the different packaged organic items really resonated well with this new [COVID-era] customer.”

# Organic Grower Summit Roundtable 2020

Leaders from three of the largest and most respected organic fresh produce companies agreed that the outlook for the organic industry is positive, with opportunities for greater growth in the coming years. Moderated by **Dave Puglia, President and CEO of Western Growers Association**, the hour-long event explored a wide range of issues, from labor and technology to the rise of indoor growing.



**Soren Bjorn**  
President of the Americas,  
Driscoll's

Large organic producers provide great supplies and opportunities to grow the entire organic category, **Bjorn** said.

.....

“Consumers want organic to be part of a healthy lifestyle. And in berries, it’s growing way faster than conventional — probably three or four times faster.”



**Vic Smith**  
President and CEO,  
JV Smith Companies

**Smith** said he has seen organic agriculture have a positive influence on conventional operations.

.....

“We’re over there spoon-feeding [fertilizer] in organic. And you go, ‘Wait a minute, do we need to use that much [in our conventional operations]?’ So, I think it was a good perspective for us to understand what we were doing and how.”



**Bruce Taylor**  
Chairman and CEO,  
Taylor Farms / Earthbound Farm

The rise of indoor growing poses a threat to the organic market and is something the industry needs to keep an eye on, said **Taylor**.

.....

“The coming competition to organic is indoor grown—whether it’s greenhouse or vertical farming—and the attraction there is local. You’ve got this huge amount of capital going into building greenhouses around the United States. And there’s no organic protocol. It’s just they go to market as local, and the consumer prefers local over organic.”





**SUNSET**

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# SMALL FARMER GROWN

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PHOTOS: ASOGUABO, a banana co-op, and PROFOSMI, an avocado co-op, both partner with Equal Exchange to bring Fairtrade Certified, organic produce to the US

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# 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've done this past year to help grow organic business.



## How the CCOF Foundation Is Helping Organic Farmers Keep Their Land



When Ge Moua and her family purchased their first plot of land last year, they never could have foreseen the challenges 2020 would bring. Owning land was supposed to bring them stability after

a decade of farming organically on leased plots that were continually sold to developers, causing the Mouas to start over again each time. Seven months after becoming landowners, however, the coronavirus pandemic shuttered farmers' markets, where they make the majority of their sales.

The Mouas owed \$3,149 in property taxes that were due during the pandemic, a time when Moua Farms had virtually no produce sales. Even after farmers' markets reopened, the Mouas saw a dramatic drop in income. "Consumers are still scared to shop with regularity," Moua explained. "We are bringing home produce and flowers back from the market every week. The only upside is that I have plenty of seeds for next season, so I won't need to buy seeds, at least."

Despite the setbacks, challenges, and looming tax bills, the Mouas will keep farming organically on their land thanks to the financial assistance from the CCOF Foundation's Bricmont Hardship Assistance Fund. "I am so grateful to the CCOF Foundation for thinking of us small farmers when times get difficult. I can't imagine not having had your support in 2020. We were

hoping it was going to be such a good year. We finally bought our own land, and without their support, we may not have been able to stay," said Moua.

This year alone, the CCOF regional chapters donated \$40,000 to other farmers who need a helping hand through this fund. When COVID hit, the CCOF Processor/Handler Chapter pledged support and challenged all CCOF chapters to match their gift, resulting in the \$40,000 that was given directly to organic farmers and producers in need.

The Bricmont fund gives grants to organic businesses affected by hardship, including the Covid-19 pandemic and natural disasters. CCOF received four times as many applications for financial assistance last year. Any organic farmer or business owner can apply for a hardship assistance grant, regardless of who provides their organic certification.

The Moua family's choice to farm organically keeps their community thriving by providing organic food. The CCOF Foundation is proud to support essential workers like the Mouas and help them stay in business in a difficult year.



[www.ccof.org/ccof-foundation](http://www.ccof.org/ccof-foundation)



## USDA Goes Where Organic Grows



USDA provides a wide range of resources for organic farms and businesses, from loans and crop insurance to research grants and technical support. “At the National Organic Program, our top priority is protecting organic supply chains to serve the farmers and businesses who play by the rules,” said Deputy Administrator Jennifer Tucker who heads the USDA National Organic Program (NOP). “With increased resources, new law enforcement partners, and innovative surveillance tools, NOP staff are working to take the profit out of organic fraud.”

NOP is a regulatory program created as a public-private partnership, where USDA provides oversight of third-party accredited certifiers who are responsible for assessing every certified farm and business, every year. As a public-private partnership the organic standards, by design, offer many opportunities for industry and the public to share input and help the program build consensus for the rules intended to provide a production process that is good for the environment from California and Maine to Alaska and Arizona.

As the number of organic farms and businesses grows, NOP continues to launch new tools to identify risk and focus resources on higher risk activities and regions. “Thanks to increased funding from Congress and support from the Department of Agriculture, we have more auditors and in-house experts, more advanced training for certifiers and more partners in law enforcement. This means we have the strength and reach to go where organic grows. Many hands are acting to protect the organic market,” said Tucker.

2020 was another big year for organic enforcement. The increased threat of serious penalties for violators, improved surveillance tools, and enhanced enforcement partnerships have resulted in faster outcomes and bigger exits by organic operations in higher risk regions around the world. NOP continues to analyze produce imports from South America to evaluate compliance. This will be a growing focus in 2021.

The publishing of the Strengthening Organic Enforcement Proposed Rule was another significant milestone in 2020 and represented input and support from organic farmers and businesses, advocacy groups, and the National Organic Standards Board (NOSB). NOP staff are now working on the Final Rule, which “...will foundationally change the game to protect organic businesses that are playing by the rules,” Tucker said.



## Managing Organic Fertility on Diversified Organic Farms



Building healthy soils is the foundation of successful farm management. However, efficiently managing soil fertility remains a

challenge for organic farmers. Determining how much organic fertilizer to apply—and when—is a complicated process: too much can pollute the air and water, and too little limits crop productivity. In Yolo County, CA, some organic farmers are reducing their reliance on organic fertilizer inputs by implementing diversification practices such as cover cropping, crop rotations, and intercropping to increase soil health and fertility.

These diversification practices add nitrogen to the soil in the form of organic nitrogen, which can then contribute to building soil organic matter. However, it is difficult for most organic farmers to determine when and how much nitrogen is available to their crops, especially if they are mainly relying on diversification practices to improve soil health and supply nitrogen.

To address this challenge, the Organic Farming Research Foundation (OFRF) funded a project led by Assistant Professors Tim Bowles and Ansel Klein at the University of California, Berkeley to quantify the flow of nitrogen from soil organic matter to plants on working organic farms. So far, the researchers have been able to measure plant-available nitrogen directly and preliminary results indicate that some organic farms have low levels of plant-available nitrogen, despite having high levels of crop diversity. One explanation could be that much of the nitrogen in the system

is tied up in soil organic matter and therefore is not detectable by traditional soil testing approaches. As the researchers continue to complete nitrogen flow lab analyses, they hope to shed more light on this finding.

In addition to lab research, Bowles and Klein also collaborated with organic farmers to create a farmer spotlight series where growers shared their insights into how to successfully implement cover crops and the importance of soil microbes for soil health. They are also finishing two podcasts in collaboration with *The Farmers Beet*, an agricultural podcast hosted by the Community Alliance for Family Farmers. Once data analysis is complete, production will begin on a short, informational video highlighting the outcomes of this project. Results from the final report can be accessed at <https://grants.ofrf.org/node/1641>





# Cultivating a Vibrant Organic Produce Shopper Base

Nearly all households purchase organic produce. However, in line with the classic “80/20 Rule,” around 80 percent of these purchases are made by just 20 percent of organic shoppers. Frequent organic produce users index higher than the general population in key demographic categories: they tend to be younger, have higher incomes, are more likely to have attended college, and have children in the home. These shoppers are also significantly more likely than the general population to be Asian or Hispanic/Latino.

COVID-19 was among many factors that led to a spike in organic produce sales in 2020. Shoppers were purchasing organic fresh produce as quickly as grocers could stock it, and it’s a good time to learn more about what motivates them.

By emphasizing the messages that have been proven most resonant with shoppers, you can help them expand their purchases from a few favorite items to a much deeper basket.

## Key Insights for fresh produce shoppers:

**Organic is regenerative and more.** The term “regenerative” means little to most people. However, the concepts behind the word—increasing biodiversity, enriching the soil, improving water quality, reversing climate change—mean a lot, and directly connect with organic produce shoppers.

**Organic is non-GMO.** Even within produce, where few crops are genetically engineered, consumers need to be reminded that organic always means non-GMO.

## Organic is for everyone—not just the elites.

Organic has grown by welcoming more diversity from all walks of life. The goal is to develop and promote products that are safer for people and planet, and more accessible for everyone. And, while no system is perfect, organic is making steady and profound progress: prices continue to come down, regulations and enforcement are strong, and more land is being transitioned to organic cultivation.

**Organic means flavor.** There’s a good reason fresh produce is the category where shoppers can most easily make the connection between organic practices and true flavors.

**Be Positive.** When you tell the authentic story behind organic and help consumers understand the value of the label, you make it easy for them to reach for the organic option. Some things to keep in mind:

1. Small and large farms alike deliver healthy organic produce. The regulations are scale-neutral and apply equally to everyone.
2. Shoppers are the heroes. By investing in organic, they are driving positive change.
3. Organic isn’t perfect, but the system is dynamic and always working to improve.



# Is Organic Produce Healthier? Rodale Institute’s Vegetable Systems Trial

The coronavirus pandemic has forced consumers to think carefully about their health and their food. In fact, organic produce sales were up an average of 30 percent this spring as shoppers looked to boost immunity through food. But what do we know about the nutrition differences between organic and conventional foods?

Rodale Institute’s Vegetable Systems Trial (VST), started in 2016, is conducting cutting-edge research to answer this pressing question by linking soil health to crop and human health. Modeled after the world-renowned Farming Systems Trial, which has been running at Rodale Institute for 40 years, VST is a long-term, side-by-side comparison of conventional and organic root, fruit, and leaf vegetable crops.

VST seeks to understand whether organic management practices and cropping systems impact nutrient density in vegetables and whether these methods may consequently improve human health in the face of declining nutrition worldwide. Organic produce has fewer pesticide residues, but early research also shows nutritional differences based on management. The Farming Systems Trial shows that organic oats contain higher levels of ergothioneine, an amino acid thought to reduce the risk of Alzheimer’s.

Results from VST research have also shown that reducing tillage increases nutrient concentration of vitamins like beta carotene and phosphorus in stored winter squash. In 2020, Rodale Institute partnered with Dickinson College in Carlisle, PA on a potato trial to support the research being conducted in VST. Dickinson

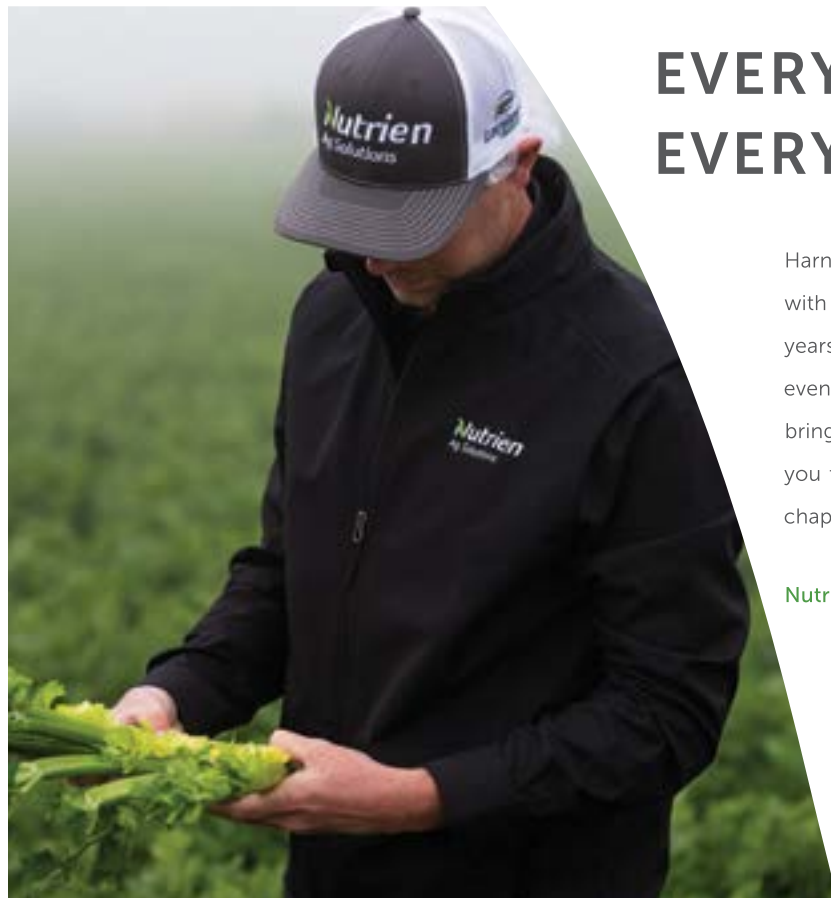


College operates an 80-acre, certified organic farm on their campus, offering research and education while providing food to the community. This partnership focuses on testing certain varieties of colored-flesh potatoes, which have shown increased antioxidant levels in comparison to white potatoes. Potatoes grown under organic and conventional systems at Rodale Institute and organic systems at Dickinson College are being processed to be analyzed for anthocyanin levels—an antioxidant thought to reduce the risk of cancer.

For updates on the results of this research, view Rodale Institute’s recent webinar, “The Impact of Management Practices on Colored Potato Crops.”







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