

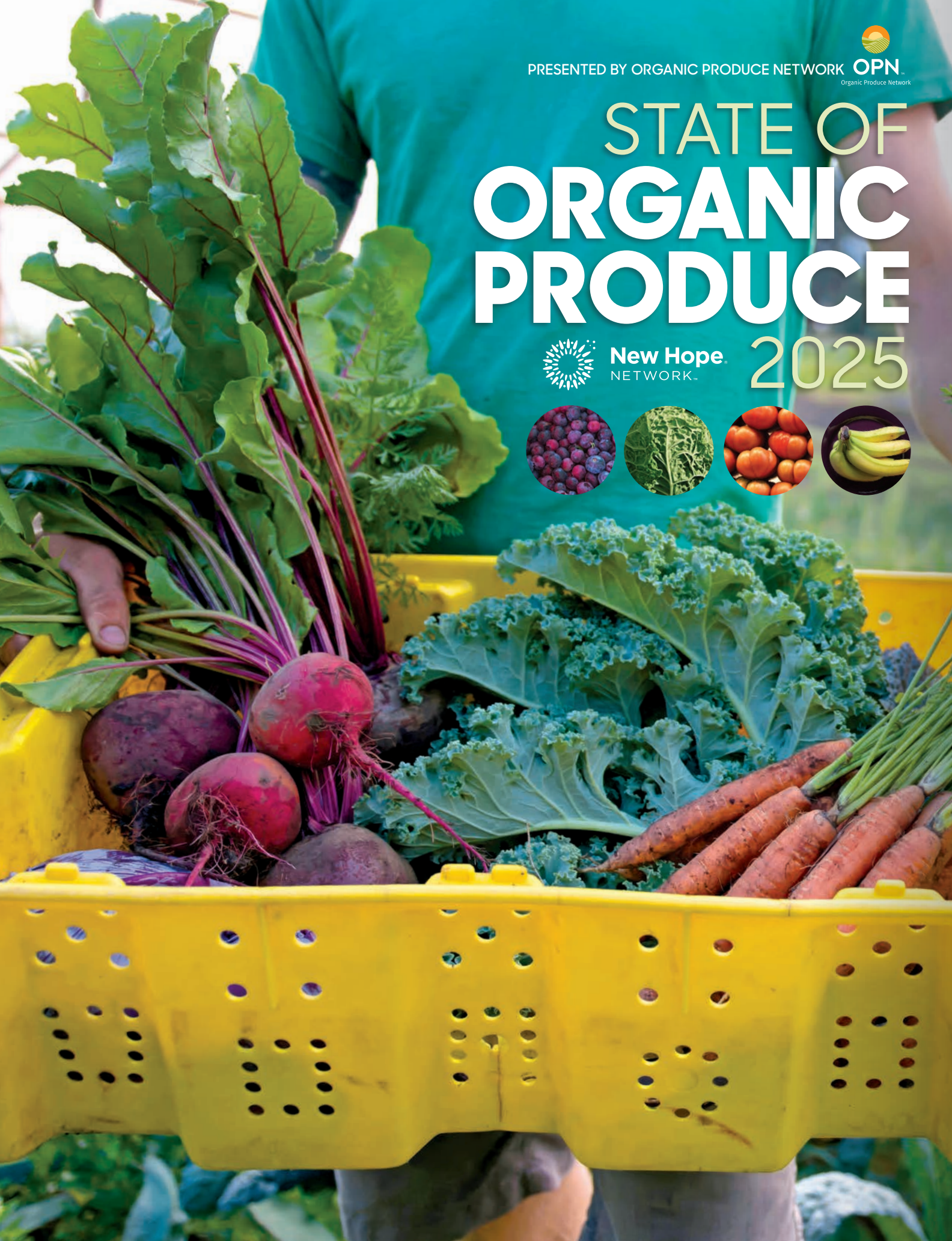
PRESENTED BY ORGANIC PRODUCE NETWORK  **OPN**  
Organic Produce Network

# STATE OF ORGANIC PRODUCE



New Hope  
NETWORK.

# 2025





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**O**rganic fresh produce sales continued their upward trajectory in 2025, boasting a 5.9% year-over-year growth rate that just surpassed the previous year's. Total sales reached \$10.6 billion, and organic sales once again outpaced conventional produce sales.

In short, more and more consumers are turning to organic fruits and vegetables to fill their shopping carts. Much of this growth is being driven by younger generations. Millennials and Gen Z shoppers not only buy the most organics, but also exhibit a deep trust in the quality, safety and integrity of the USDA Organic seal, according to a 2025 consumer survey by the Organic Trade Association of Consumer Perception of USDA Organic and Competing Label Claims. The survey also reported that more than half of U.S. consumers bought an organic fruit or vegetable last year. And thanks to the abundance of fresh, organic options in today's marketplace, enjoying organic produce has never been easier or more accessible.

The Organic Produce Network is proud to bring you key industry updates and so much more, but it wouldn't be possible without our community of readers, contributors and partners.

Thank you and cheers to a fruitful (and vegetableful) future.

**The Organic Produce Network Team**



Better Food for a Better World

# FRESH ORGANIC PRODUCE: NOW AVAILABLE



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Organic Produce Summit

Organic Grower Summit



FROM TOP: STEVE CAVALIER / ALAMY STOCK PHOTO, PHLOEN / ALAMY STOCK PHOTO, TRAVEL SEYCHELLES - CHRIS RIDLEY / ALAMY STOCK PHOTO, MBI / ALAMY STOCK PHOTO.

COVER IMAGE: CAVAN IMAGES / ALAMY STOCK PHOTO  
COVER INSET IMAGES: PANTHER MEDIA GMBH / ALAMY STOCK PHOTO, ZONAR GMBH / ALAMY STOCK PHOTO, SHAPENCOLOUR / ALAMY STOCK PHOTO, PHOTOARKIVE / ALAMY STOCK PHOTO

# Insights & Inspiration



NEXTY AWARDS FINALISTS • NEW PRODUCT LAUNCHES • SHOW AGENDA



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New Hope NETWORK.



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# SALES & PERFORMANCE OVERVIEW



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# U.S. ORGANIC PRODUCE SALES CLIMB TO \$10.6 BILLION IN 2025, GROWING 5.9%



PHILIPP BEREZHNOY / ALAMY STOCK PHOTO

Organic fresh produce sales in the U.S. continued to climb in 2025, growing 5.9% to \$10.6 billion, with volume increasing by 6.4%. Organic sales advanced at a pace nearly five times faster than conventional produce, which recorded 1.3% growth in sales and 0.9% growth in the total produce share volume.

In response to increasing demand for organic options, growers and retailers are expanding their organic produce assortments, aiming to command a larger share of the basket among health-focused shoppers. Organic produce accounts for 13% of total retail produce sales, 1% higher than in 2024, and 8% of overall produce volume, also 1% higher than the year prior.

Organic Produce Network collaborated with Category Partners to deliver this annual report highlighting 20 high-performing organic produce categories.\* This Sales and Performance Overview offers a clear view of organic's position within the broader fresh produce market, including the top 20 categories by sales and volume, regional growth patterns and year-over-year trends for both organic and conventional produce.

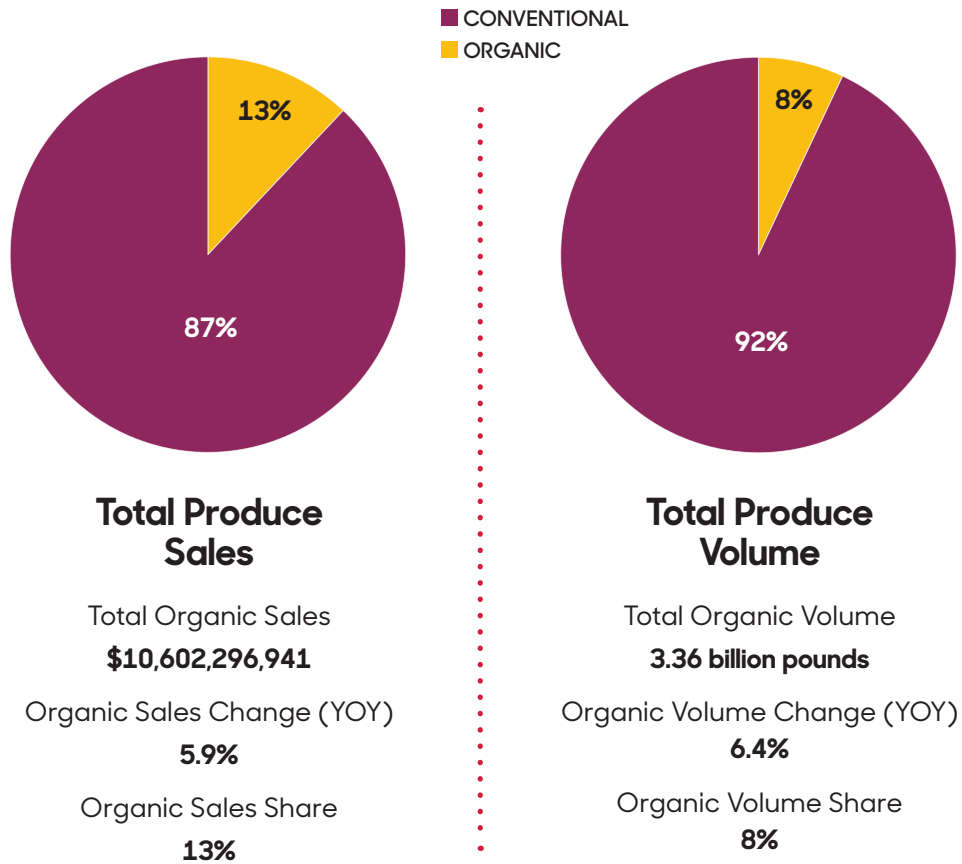
*\*The numbers and charts reported in this end-of-year review are based on NielsenIQ syndicated data. NielsenIQ periodically restates its data to incorporate updates from previous periods. These restatements may result in slight differences in numbers.*

All data and information provided exclusively by Category Partners



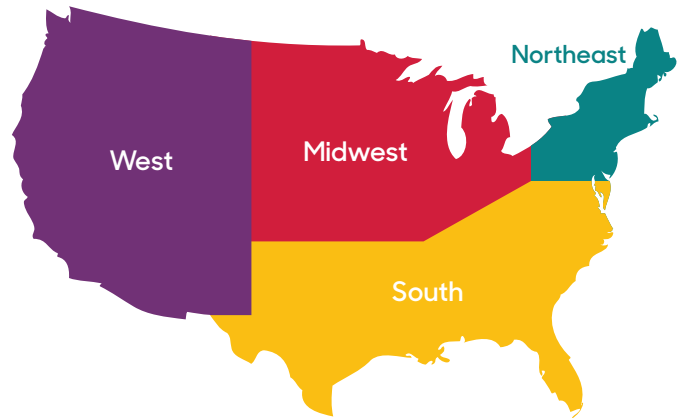
## ORGANIC VS. CONVENTIONAL

Organic produce sales topped \$10.6 billion in 2025, with a 5.9% year-over-year sales increase. Organic's growth outpaced that of conventional produce, which gained just 1.3% in sales. The categories were similarly split in volume growth, with organic produce showing 6.4% growth and conventional produce a more modest 0.9% gain over the previous year.



## REGIONAL ORGANIC PERFORMANCE

Organic produce sales grew across the country, as they did in 2024. The South was again the top performer, with an increase of 8% year-over-year. Volume gains were strongest in the Northeast (8.3%), followed closely by the South (7.8%) and the Midwest (7.7%). The West also posted volume growth, though at a more modest 3.1%.

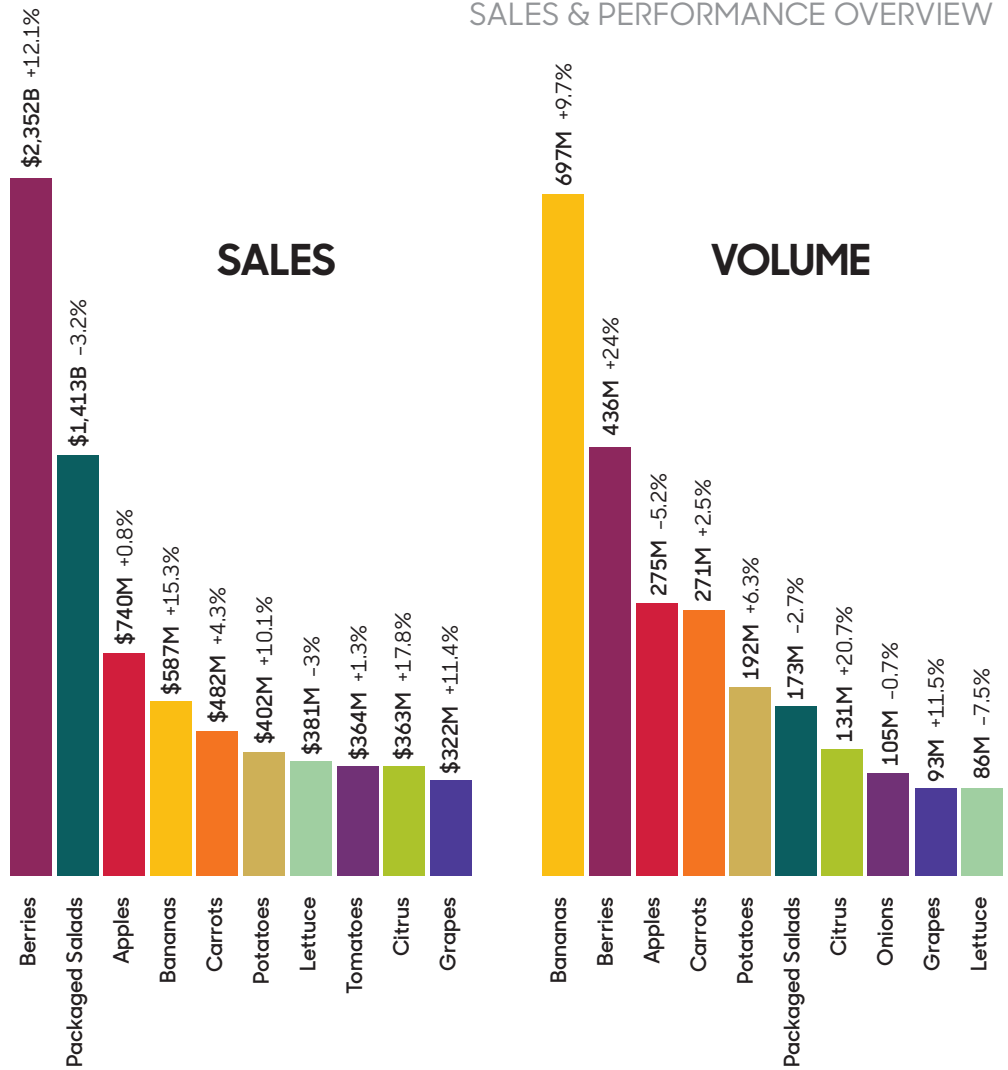


Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$3,088,167,270</b>	<b>\$1,616,803,181</b>	<b>\$3,522,874,206</b>	<b>\$2,363,142,354</b>
Sales Change (YOY)	+\$84,029,575	+\$100,886,780	+\$262,232,462	+\$147,936,574
Sales % Change (YOY)	+2.8%	+6.7%	+8%	+6.7%
<b>VOLUME (POUNDS)</b>	<b>951,578,950</b>	<b>542,995,173</b>	<b>1,179,325,735</b>	<b>683,636,500</b>
Volume Change (YOY)	+28,215,578	+38,748,4444	+84,993,841	+52,608,068
Volume % Change (YOY)	+3.1%	+7.7%	+7.8%	+8.3%

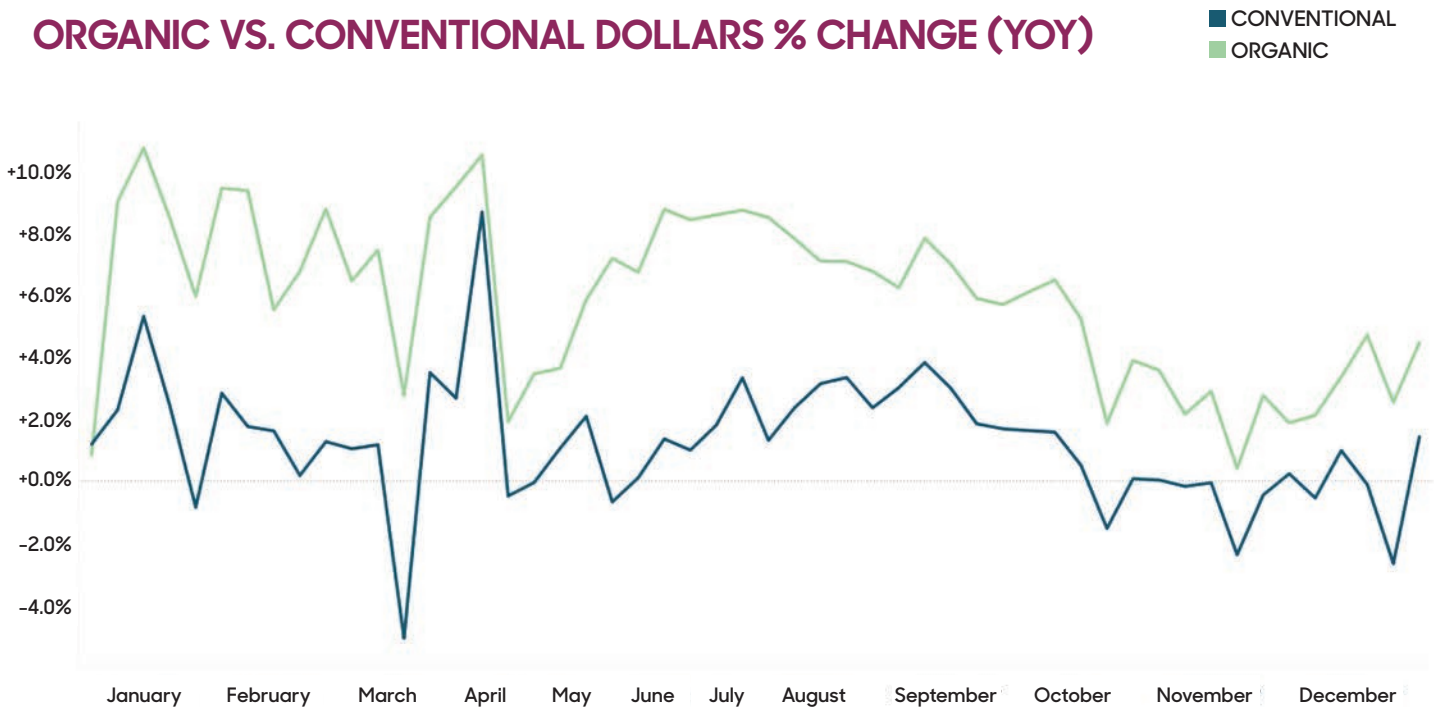
## TOP 10 ORGANIC CATEGORIES

Berries held on to the top spot for the fourth year in a row, with sales of close to \$2.4 billion. As they did last year, packaged salads claimed the #2 spot with \$1.4 billion in sales. Apples came in third, far behind the category leaders, with \$740 million in sales.

Bananas remained top of the bunch, boasting the most produce sold by volume in the organic fresh produce sector, with 697 million pounds sold. Berries grabbed the next spot with 436 million pounds sold. Apples came in third at 275 million pounds.



## ORGANIC VS. CONVENTIONAL DOLLARS % CHANGE (YOY)



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It's **EASY** to **THINK** of an **ONION** as just an **ONION**,  
but **CONSUMERS** see it **DIFFERENTLY**.

They notice quality, evaluate flavor and are often the most honest critics. They are looking for produce that not only looks good but also tastes great. Our goal is to help our customers meet these expectations by consistently delivering fresh onions with exceptional flavor profiles.

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DAVID ZAITZ / ALAMY STOCK PHOTO

# LEADING CATEGORY PERFORMERS



# BERRIES

**F**or the fourth consecutive year, organic berries (strawberries, blueberries, raspberries and blackberries) led in sales, reaching almost \$2.4 billion in 2025—a 12.1% increase from the previous year. With 436 million pounds sold (up 24% from 2024), they ranked second in volume behind bananas. Priced 24.7% above conventional berries, organic berries remained a high-value segment within fresh produce.

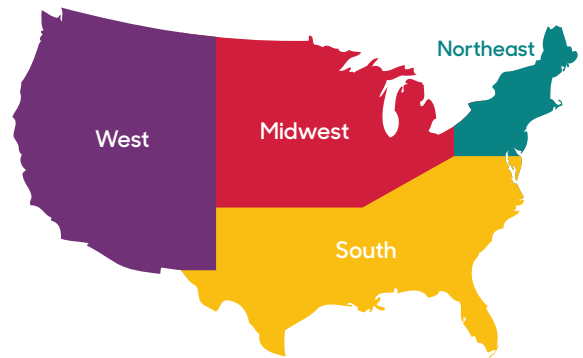
*"Retailers that maintain a strong commitment to organic continue to see positive growth. Across organic-focused retailers, demand has remained healthy and consistent, reinforcing the strength and resilience of the organic category even as the broader marketplace evolves."*

**Scott Mabs**  
CEO  
Homegrown Organic Farm

CHARLES STIRLING (TRAVEL) / ALAMY STOCK PHOTO

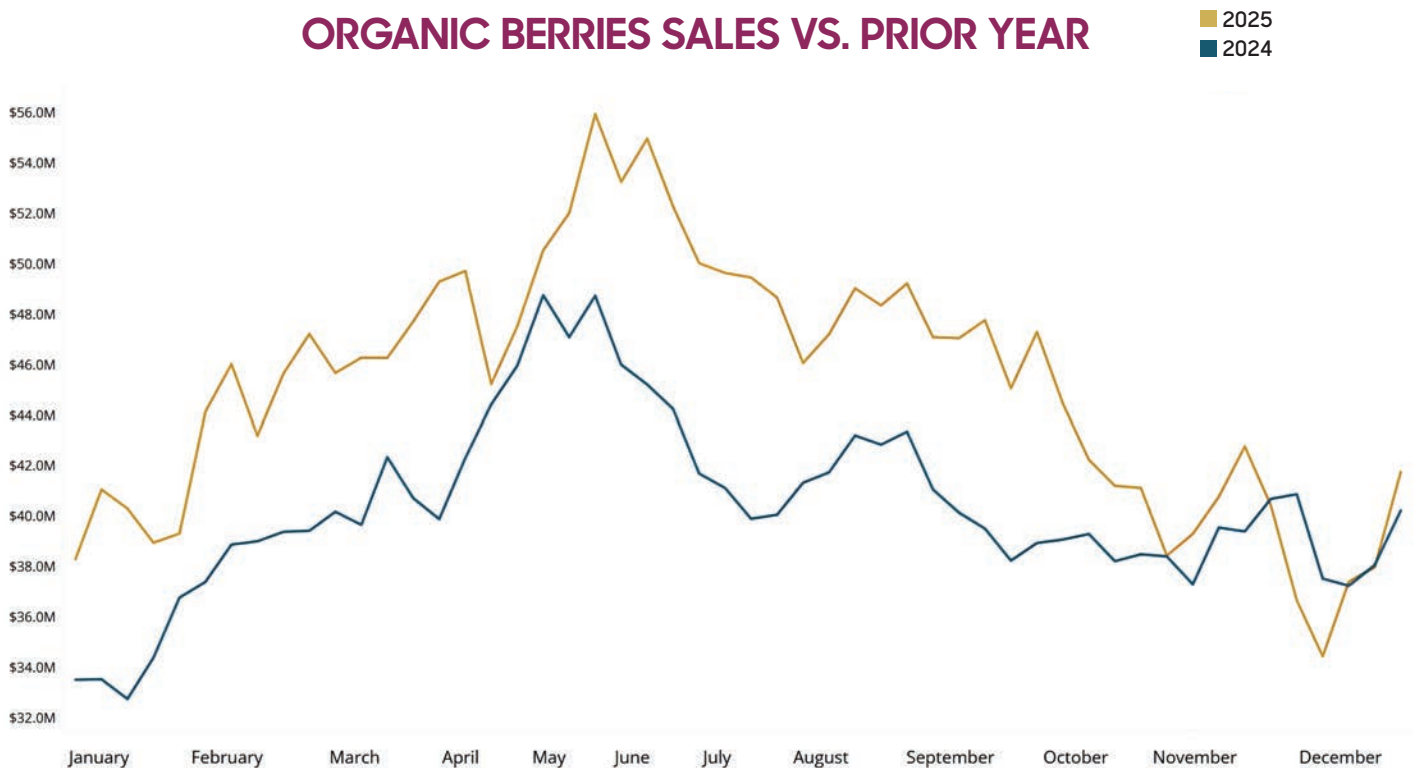
## Regional Performance

Organic berry sales grew across the nation. The South led sales (15.6%) and volume (31.8%) growth. Performance growth was slowest in the West, at 6.1% (sales) and 11.8% (volume).



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$628,409,902</b>	<b>\$367,875,236</b>	<b>\$818,137,200</b>	<b>\$533,104,876</b>
Sales Change (YOY)	+\$36,177,722	+\$37,547,995	+\$110,541,887	+\$68,802,904
Sales % Change (YOY)	+6.1%	+11.4%	+15.6%	+14.8%
<b>VOLUME (POUNDS)</b>	<b>104,187,479</b>	<b>81,062,237</b>	<b>169,793,855</b>	<b>80,964,004</b>
Volume Change (YOY)	+11,034,715	+16,030,517	+40,933,798	+16,292,439
Volume % Change (YOY)	+11.8%	+24.7%	+31.8%	+25.2%

## ORGANIC BERRIES SALES VS. PRIOR YEAR





# PACKAGED SALADS

**O**rganic packaged salads ranked second in sales in 2025, generating \$1.4 billion. Sales declined 3.2% year-over-year, while volume fell 2.7% to 173 million pounds, reflecting consumer spending-pattern shifts in the shadow of inflation. Even so, the category held a 68.8% price premium over conventional salads, in line with 2024 levels.

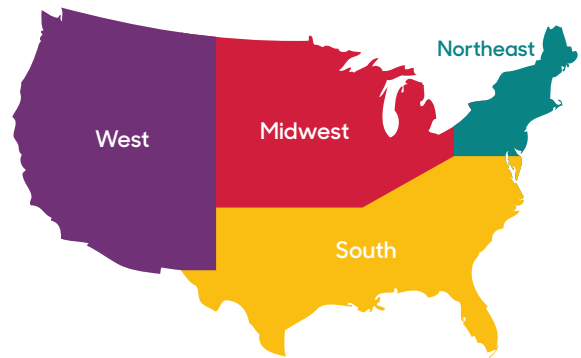
*"Organic washed and trimmed whole-leaf lettuces had a strong year in 2025. As shoppers remain price-conscious but time-sensitive, washed and trimmed programs are hitting that sweet spot between quality, versatility, and everyday affordability."*

**Nicole Zapata**  
Marketing Director  
Misionero

PANTHER MEDIA GLOBAL / ALAMY STOCK PHOTO

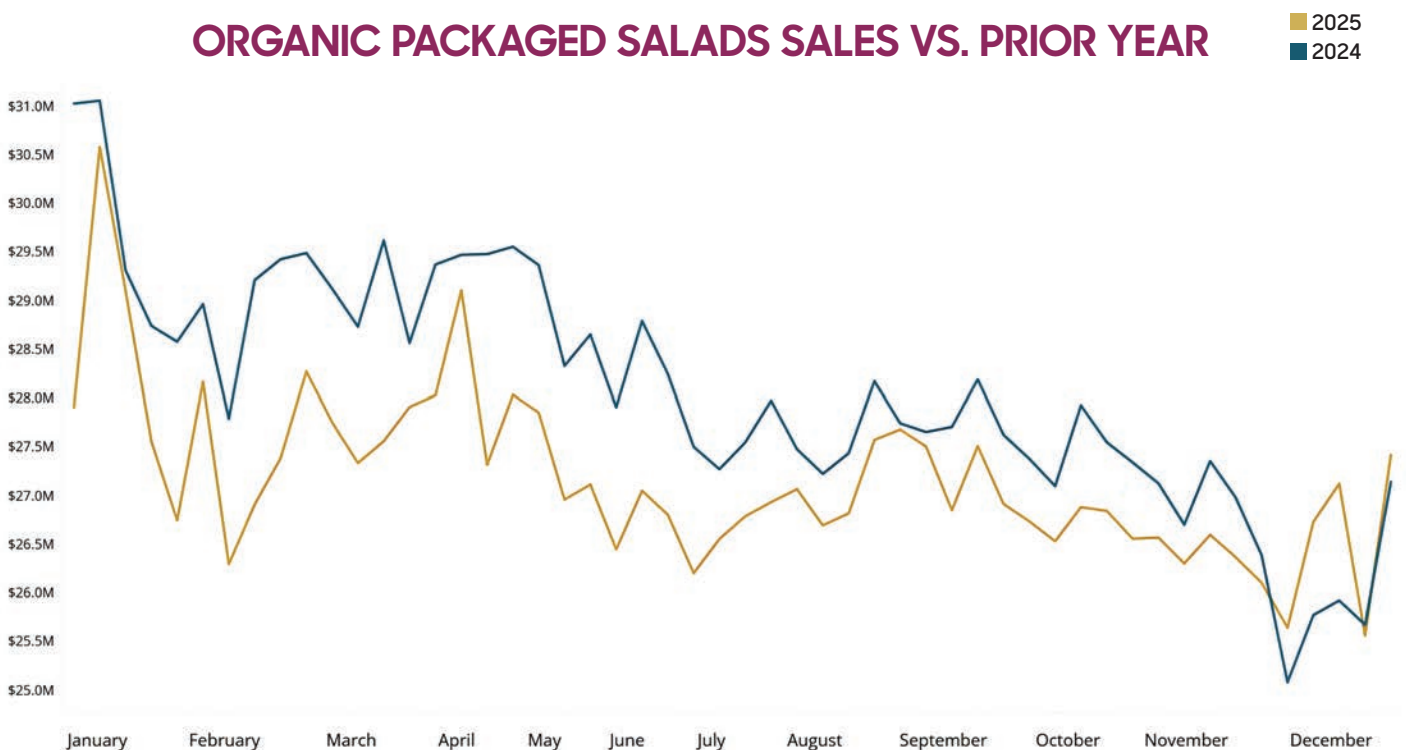
## Regional Performance

As they did the prior year, **organic packaged salads** posted year-over-year drops in sales and volume in all four regions, with the Northeast posting the largest declines at -6.2% and -6.5%, respectively.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$411,555,623</b>	<b>\$247,766,077</b>	<b>\$460,750,218</b>	<b>\$291,841,706</b>
Sales Change (YOY)	-\$4,497,493	-\$9,672,513	-\$13,186,288	-\$19,214,334
Sales % Change (YOY)	-1.1%	-3.8%	-2.8%	-6.2%
<b>VOLUME (POUNDS)</b>	<b>49,131,587</b>	<b>31,217,293</b>	<b>57,233,642</b>	<b>35,149,575</b>
Volume Change (YOY)	-483,893	-761,490	-1,116,969	-2,433,171
Volume % Change (YOY)	-1%	-2.4%	1.9%	-6.5%

## ORGANIC PACKAGED SALADS SALES VS. PRIOR YEAR





# APPLES

**O**rganic apples sales grew by 0.8% in 2025, with sales rising to \$740 million. Volume dropped by 5.2% to 275 million pounds. The price premium rose from 45% in 2024 to 47.4% over conventional apples, showing organic apples continued to resonate with consumers, supporting higher price points across the category.

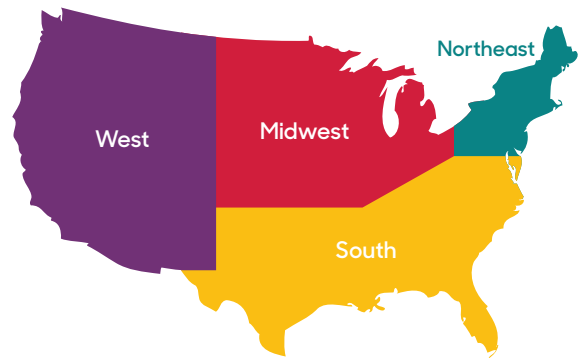
*"It was one of the most challenging years in history for the organic Northwest apple crop. Drought conditions, heat stress, labor shortages, skyrocketing expenses and flat sale prices were all significant contributing factors. Additionally, New Zealand experienced hail damage alongside tariffs and a weakening U.S. dollar, meaning 2026 imports are expected to be light."*

**Ben Johnson**  
President  
Bridges Produce

DAVID BAGNALL / ALAMY STOCK PHOTO

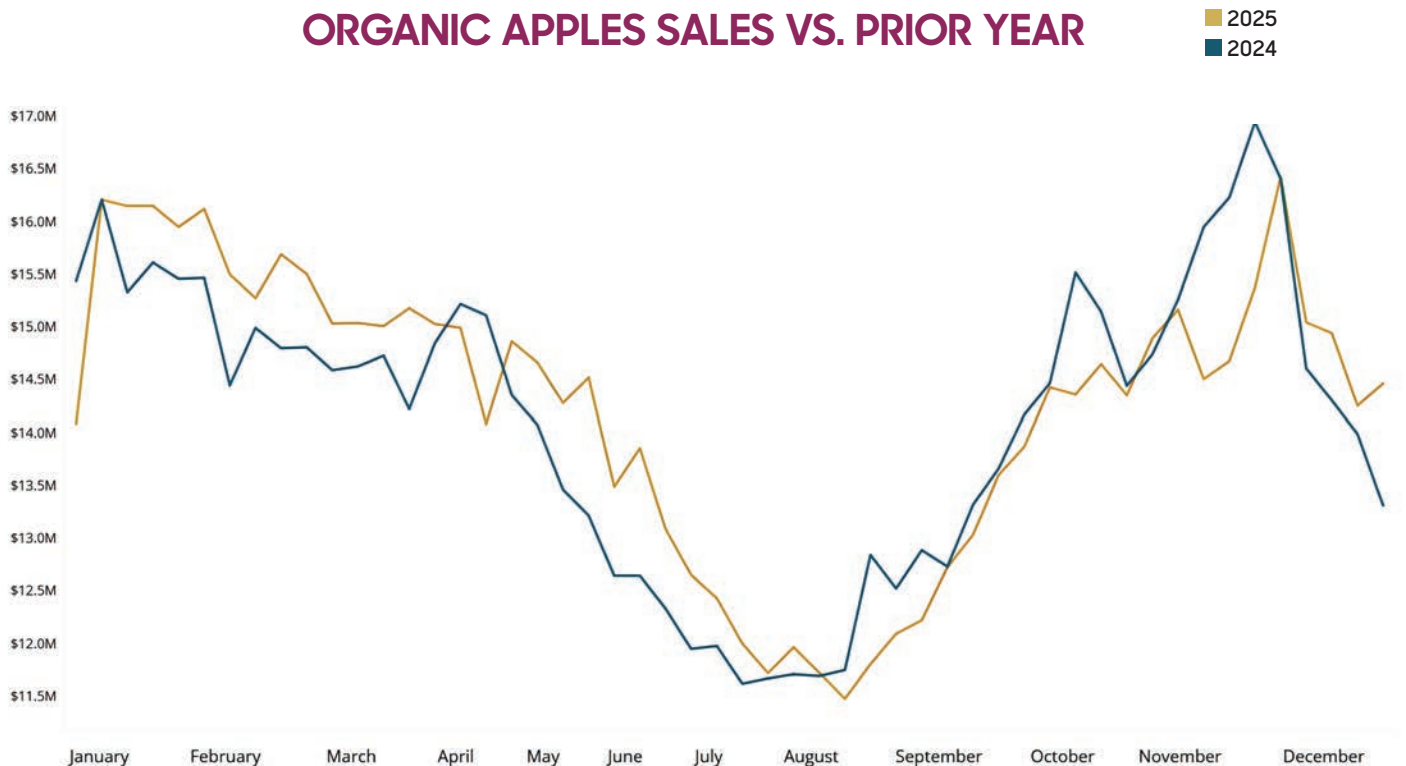
## Regional Performance

Organic apple sales rose in every region but the West, where sales dropped slightly, by 0.8%. But volumes tanked across the nation, from -4.2% in the South to -7.2% in the Midwest.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$193,231,655</b>	<b>\$105,245,999</b>	<b>\$272,331,160</b>	<b>\$168,924,753</b>
Sales Change (YOY)	-\$1,620,342	+\$1,384,586	+\$4,494,023	+\$1,835,364
Sales % Change (YOY)	-0.8%	+1.3%	+1.7%	+1.1%
<b>VOLUME (POUNDS)</b>	<b>68,411,288</b>	<b>40,198,498</b>	<b>105,318,245</b>	<b>61,036,613</b>
Volume Change (YOY)	-4,261,591	-3,132,178	-4,588,528	-3,182,143
Volume % Change (YOY)	-5.9%	-7.2%	-4.2%	-5%

## ORGANIC APPLES SALES VS. PRIOR YEAR





# BANANAS

**O**rganic bananas carried strong momentum into 2025, with sales climbing 15.3% to \$587 million and earning the category a fourth-place spot among organic produce. Volume rose 9.7% year-over-year to 697 million pounds, a commanding lead over the next contender, organic berries, which came in at 436 million pounds.

Even at a 40.9% premium to conventional bananas, organic bananas remained within reach for many households. Their relatively approachable price point, combined with everyday utility, helped sustain demand among shoppers who prioritize organic choices as they keep an eye on value.

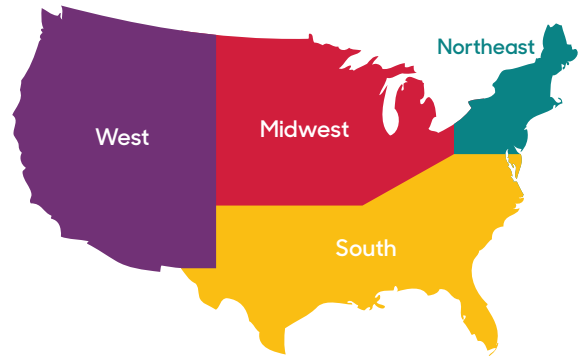
*"While limited banana domestic production can exist in places like Hawaii, Puerto Rico and parts of southern Florida, these areas face land constraints and pressures like urban sprawl, making large-scale production difficult."*

**American Farm Bureau  
Federation**

TRAVEL SEYCHELLES - CHRIS RIDLEY / ALAMY STOCK PHOTO

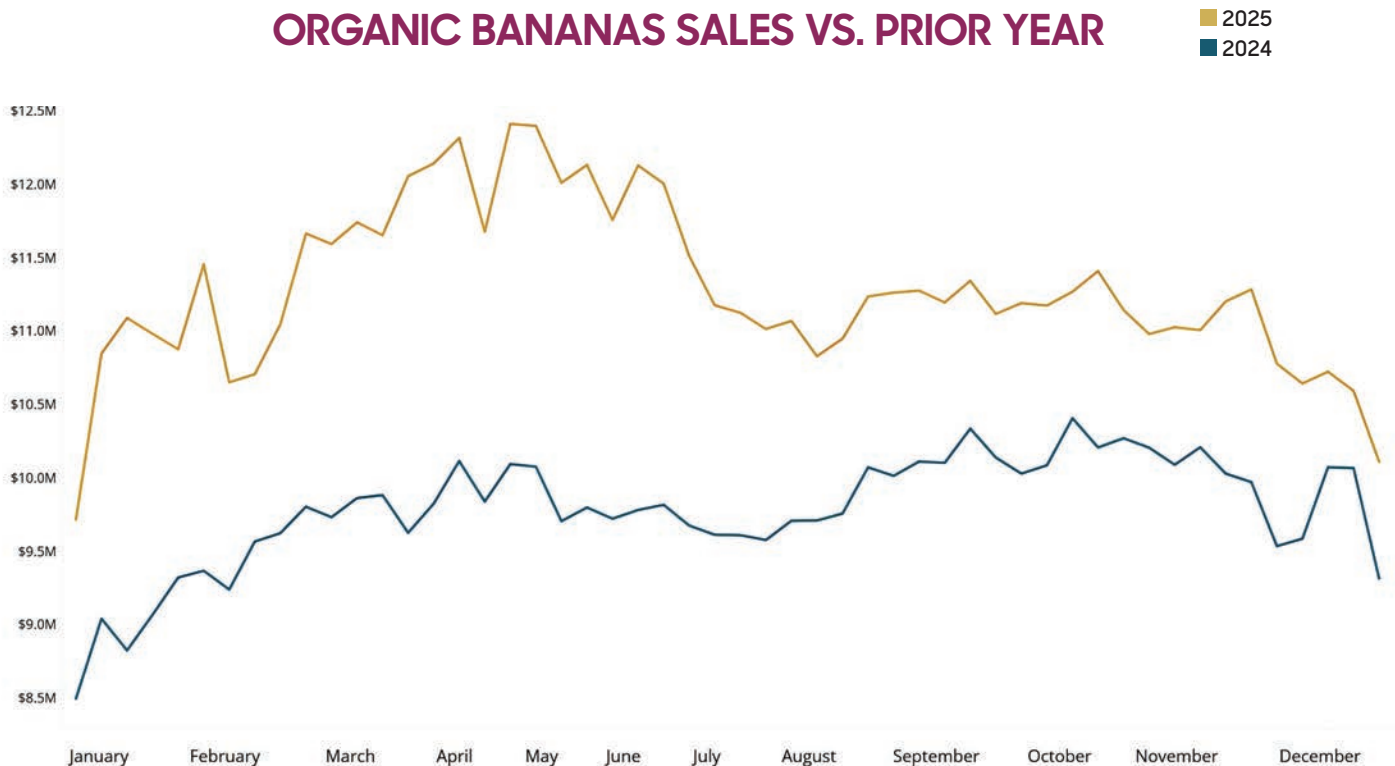
## Regional Performance

**Organic banana** sales grew by double digits across the country. Sales grew most quickly in the South (19.3%) and the Northeast (18.7%). The Northeast saw the biggest change in volume, growing by 15.7%.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$163,854,167</b>	<b>\$94,684,196</b>	<b>\$222,347,256</b>	<b>\$105,550,852</b>
Sales Change (YOY)	+\$14,927,207	+\$10,470,839	+\$35,903,674	+\$16,652,219
Sales % Change (YOY)	+10%	+12.4%	+19.3%	+18.7%
<b>VOLUME (POUNDS)</b>	<b>180,640,551</b>	<b>116,151,477</b>	<b>268,925,055</b>	<b>130,828,924</b>
Volume Change (YOY)	+11,459,063	+9,492,177	+22,616,769	+17,721,941
Volume % Change (YOY)	+6.8%	+8.9%	+9.2%	+15.7%

## ORGANIC BANANAS SALES VS. PRIOR YEAR





# CARROTS

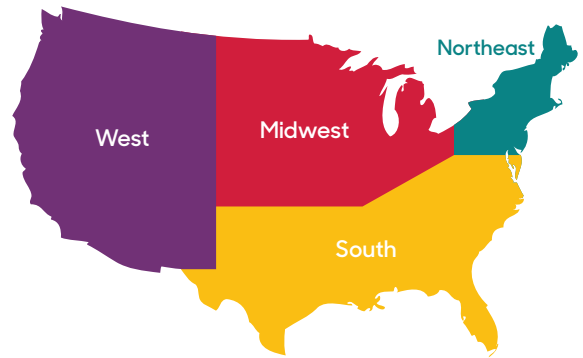
On the heels of an E. coli outbreak linked to organic carrots in Q4 of 2024, the category saw steady growth in 2025, with sales rising 4.3% year-over-year to \$482 million. Volume increased by 2.5%. These numbers lifted carrots from #6 in sales in 2024 to the #5 sales spot in 2025. At a 24.9% premium, among the lowest across organic produce, carrots offered an accessible way for shoppers to stay within budget while choosing organic.

*On the rebound from 2024, organic carrot sales rose by 4.3% in 2025.*



## Regional Performance

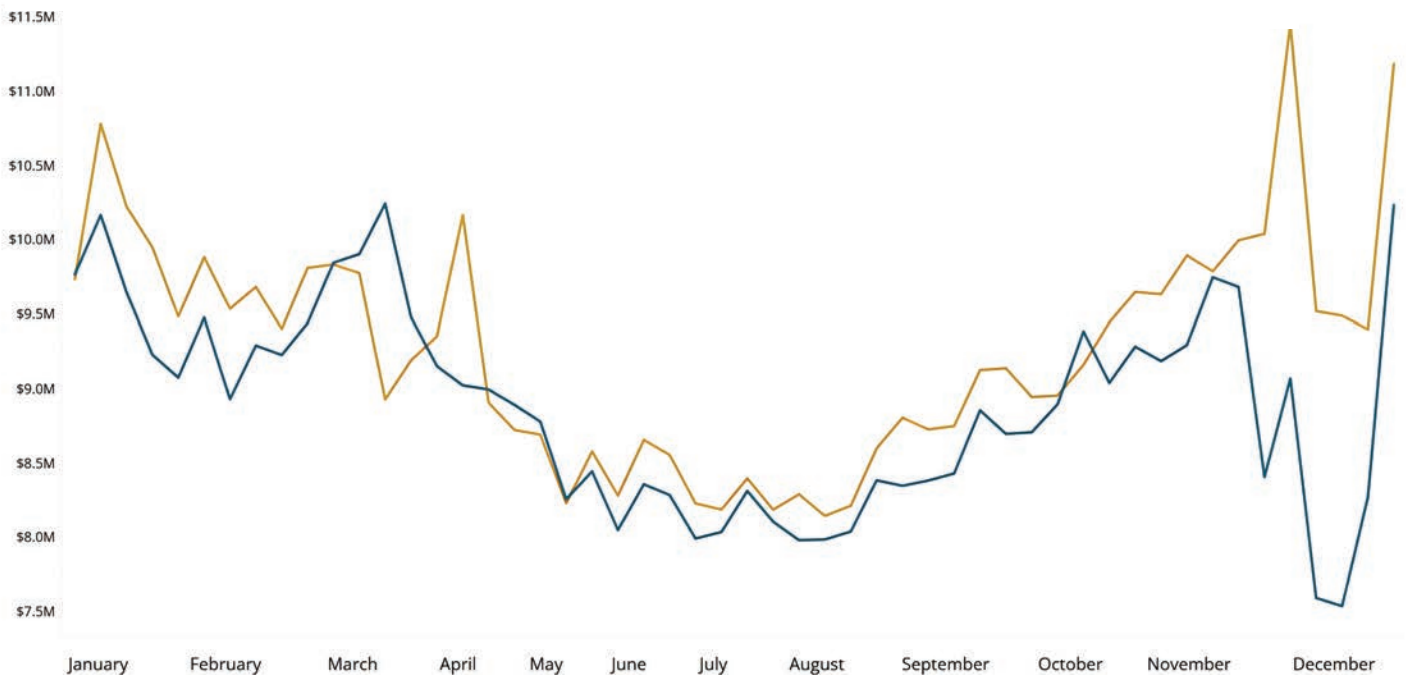
Sales of **organic carrots** increased across the country, led by the South, with \$159.8 million in sales. Volume grew everywhere except the West, where it decreased by -1.1%.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$124,340,147</b>	<b>\$88,877,433</b>	<b>\$159,800,343</b>	<b>\$108,006,424</b>
Sales Change (YOY)	+\$721,744	+\$5,170,111	+\$9,772,036	+\$4,198,382
Sales % Change (YOY)	+0.6%	+6.2%	+6.5%	+4%
<b>VOLUME (POUNDS)</b>	<b>64,905,590</b>	<b>50,804,696</b>	<b>94,532,554</b>	<b>60,066,512</b>
Volume Change (YOY)	-714,641	+1,428,647	+3,309,488	+2,551,448
Volume % Change (YOY)	-1.1%	+2.9%	+3.6%	+4.4%

## ORGANIC CARROTS SALES VS. PRIOR YEAR

■ 2025  
■ 2024





# POTATOES

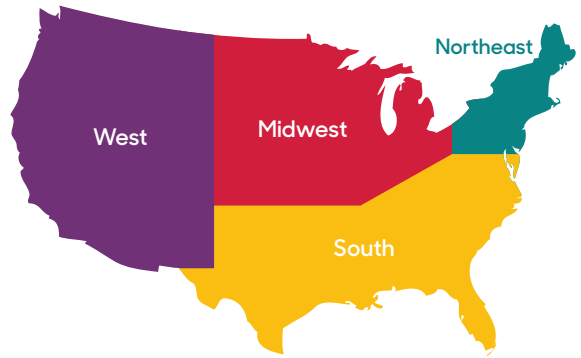
**O**rganic potato sales advanced at a healthy pace in 2025, with sales rising 10.1% year-over-year to reach \$402 million. This performance launched potatoes from the #8 spot in sales in 2024 to #6 in 2025. Volume increased as well, growing by 6.3% to reach 192 million pounds. At the same time, the price premium widened, increasing from 110% over conventional potatoes in 2024 to 117.2% in 2025. Even with that spread, shoppers continued to support organic potatoes, reinforcing their position as a staple within the organic basket.

*"Sweet potatoes are really resonating with consumers who are understanding more and more how to utilize them in their daily lives. This is very exciting for the category."*

**Susan Noritake**  
Vice President of Sales  
and Marketing  
**Bako Sweet**

## Regional Performance

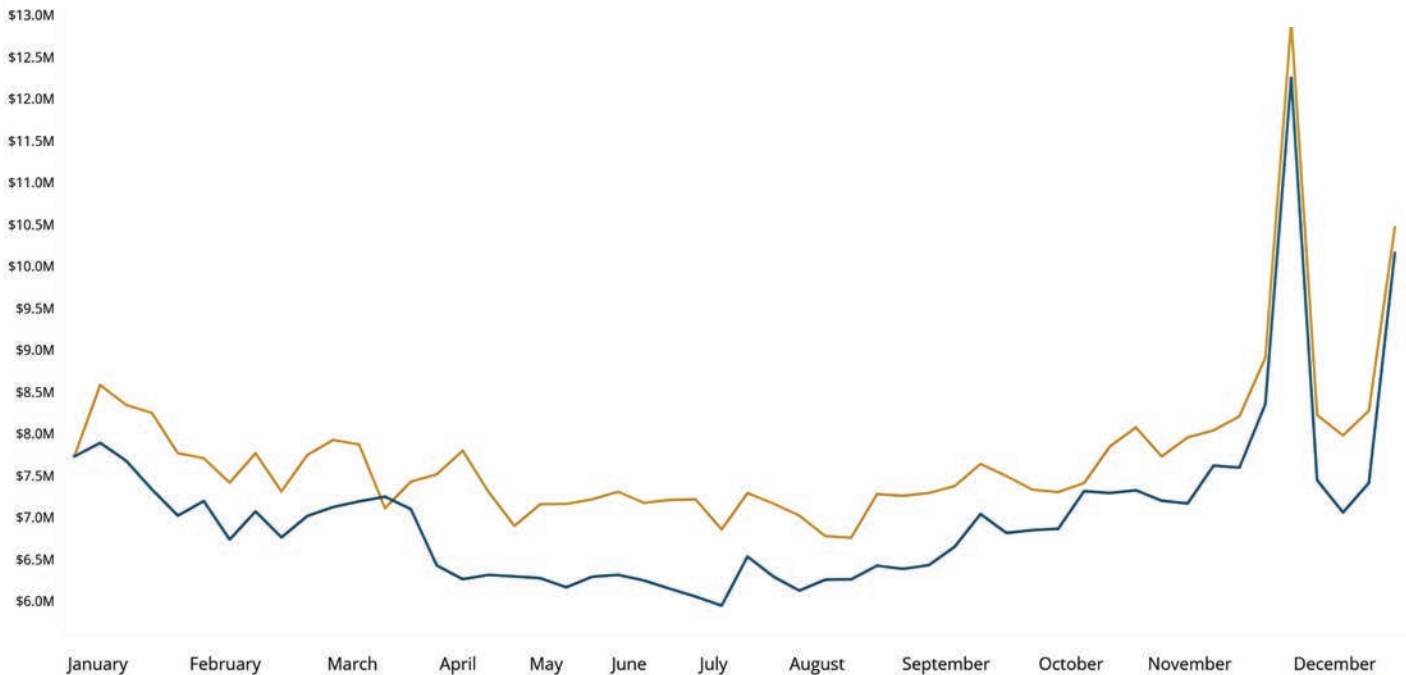
Sales of **organic potatoes** grew across the country, most notably in the Northeast, where sales rose by 12.8%. Sales in the Midwest followed at 11.1%, with the South close behind at 10.3%. Volume increased the most in the Northeast.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$113,647,554</b>	<b>\$55,562,783</b>	<b>\$136,930,391</b>	<b>\$95,568,621</b>
Sales Change (YOY)	+\$7,550,768	+\$5,553,152	+\$12,818,304	+\$10,856,160
Sales % Change (YOY)	+7.1%	+11.1%	+10.3%	+12.8%
<b>VOLUME (POUNDS)</b>	<b>53,937,570</b>	<b>27,595,262</b>	<b>65,189,810</b>	<b>45,048,134</b>
Volume Change (YOY)	+1,987,228	+1,357,066	+3,600,007	+4,479,185
Volume % Change (YOY)	+3.8%	+5.2%	+5.8%	+11%

## ORGANIC POTATOES SALES VS. PRIOR YEAR

■ 2025  
■ 2024





# LETTUCE

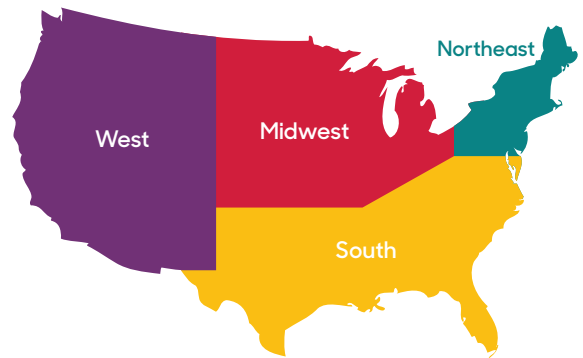
**S**ales of organic lettuce dipped in 2025, dropping by 3% to \$381 million. Volume shrank by 7.5% to 86 million pounds. Although sales softened, the category continued to command a 118.2% premium over conventional lettuce, underscoring its elevated positioning within organic produce.

*"Consumers are increasingly seeking crunch and structure, and new organic field-grown varieties are resonating because they deliver that satisfying eating experience at an accessible price point."*

**Nicole Zapata**  
Marketing Director  
Misionero

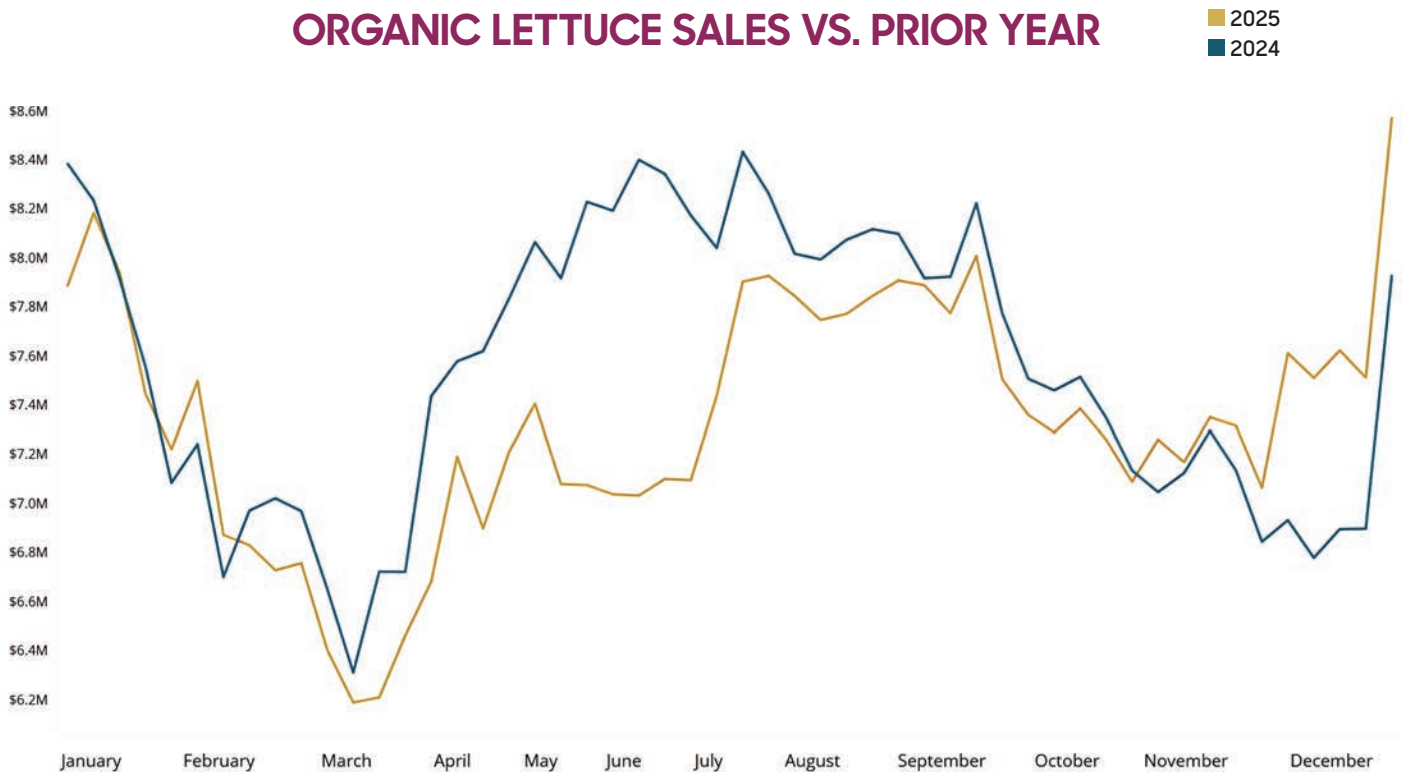
## Regional Performance

Organic lettuce sales dipped in every region, decreasing the most in the South, by -5.7%. Volume sold decreased across the country as well, most notably in the Midwest (-12.1%).



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$117,585,687</b>	<b>\$45,689,315</b>	<b>\$120,678,017</b>	<b>\$96,438,042</b>
Sales Change (YOY)	-\$1,207,357	-\$2,261,220	-\$7,296,889	-\$931,715
Sales % Change (YOY)	-1.0%	-4.7%	-5.7%	-1.0%
<b>VOLUME (POUNDS)</b>	<b>29,707,687</b>	<b>10,905,328</b>	<b>27,896,116</b>	<b>17,792,383</b>
Volume Change (YOY)	-958,953	-1,495,258	-3,700,291	-851,395
Volume % Change (YOY)	-3.1%	-12.1%	-11.7%	-4.6%

## ORGANIC LETTUCE SALES VS. PRIOR YEAR





# TOMATOES

**M**oving up the list one spot in 2025, organic tomato sales grew by 1.3% to reach \$364 million. Sales volume decreased by 2.1%. Organic tomatoes claimed the highest premium among all organic produce categories in 2025. At a 127.5% premium over conventional, organic tomatoes showed significant pricing power within the category.

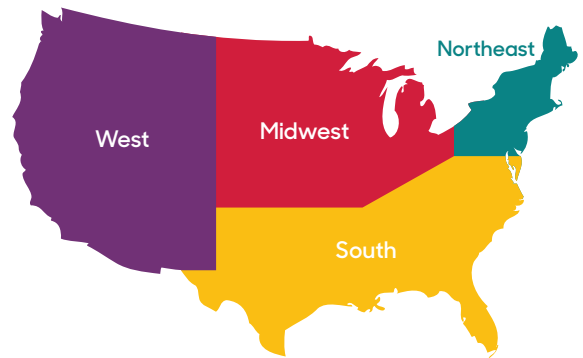
*"Flavor and convenience remain predominant, as we can see in the market growth of high-flavor snacking varieties in tomatoes and cucumbers."*

**Joanna Jaramillo**  
Marketing Manager  
Wholesum Family Farms

ROY RILEY / ALAMY STOCK PHOTO

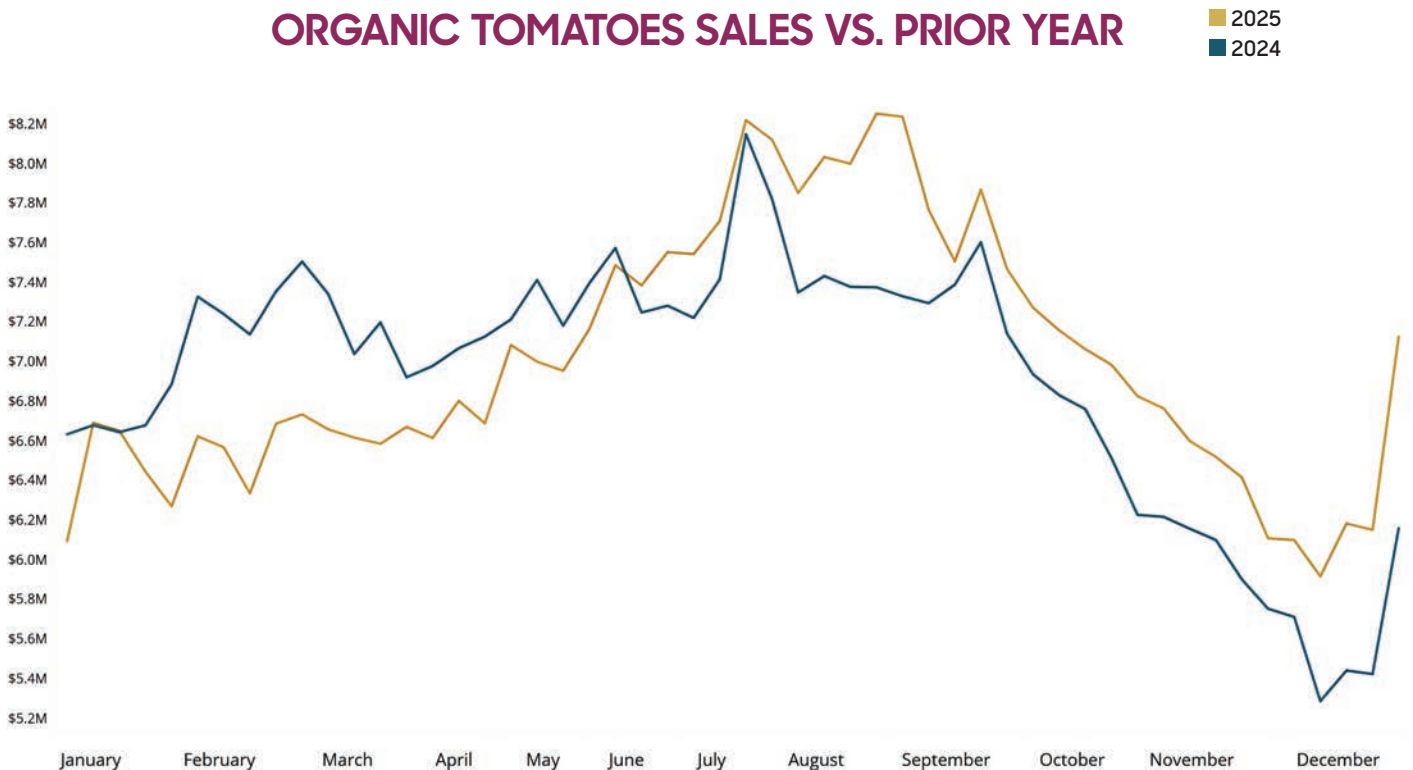
## Regional Performance

Organic tomato sales were strongest in the South, where they grew at a 7% rate, year-over-year. Midwest sales also rose, at 2.4% year-over-year, while sales in the West and Northeast slowed by -1.7% and -0.8%, respectively.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$127,375,203</b>	<b>\$44,912,449</b>	<b>\$103,415,700</b>	<b>\$87,908,965</b>
Sales Change (YOY)	-\$2,181,541	+\$1,063,610	+\$6,723,425	-\$703,795
Sales % Change (YOY)	-1.7%	+2.4%	+7.0%	-0.8%
<b>VOLUME (POUNDS)</b>	<b>26,655,677</b>	<b>9,882,473</b>	<b>22,699,629</b>	<b>16,052,100</b>
Volume Change (YOY)	-1,167,296	-200,296	+547,658	-794,732
Volume % Change (YOY)	-4.2%	-2.0%	+2.5%	-4.7%

## ORGANIC TOMATOES SALES VS. PRIOR YEAR





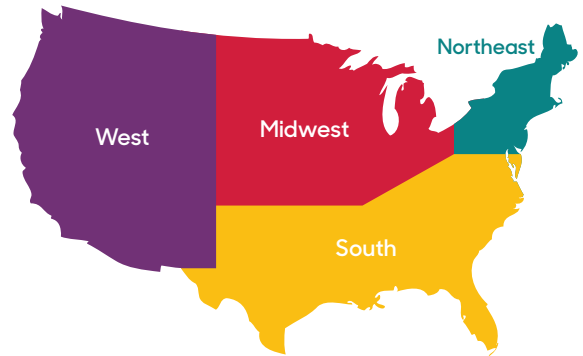
# CITRUS

**O**rganic citrus sales grew by a whopping 17.8% in 2025, shooting the fruit up to #9 from the #10 spot in 2024. Sales reached \$363 million. The volume sold grew by 20.7% year-over-year. With a 66.4% premium to conventional fruit, organic citrus reinforced its position as a differentiated, value-added segment within the category.

*At an impressive year-over-year growth rate of 17.8%, citrus sales reached \$363 million in 2025.*

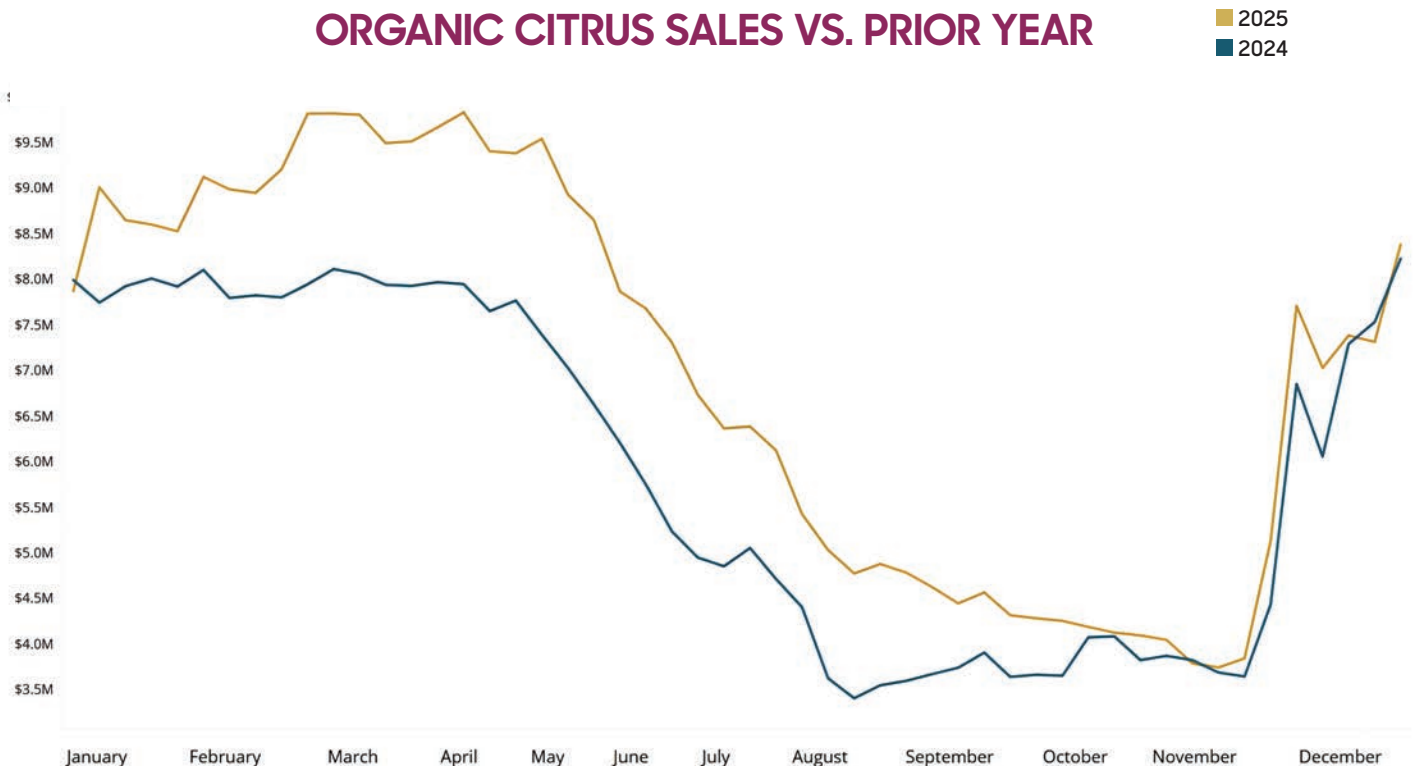
## Regional Performance

Organic citrus sales grew at a very healthy clip across the U.S., led by 27.9% year-over-year growth in the Midwest. The South showed the next-highest year-over-year growth at 17.7%, with the Northeast close on its heels with 17.6% growth.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$98,126,160</b>	<b>\$54,117,004</b>	<b>\$128,871,185</b>	<b>\$81,888,242</b>
Sales Change (YOY)	+\$11,403,150	+\$11,795,928	+\$19,373,168	+\$12,239,841
Sales % Change (YOY)	+13.1%	+27.9%	+17.7%	+17.6%
<b>VOLUME (POUNDS)</b>	<b>34,784,581</b>	<b>21,482,160</b>	<b>47,149,321</b>	<b>27,865,435</b>
Volume Change (YOY)	+4,775,867	+5,347,069	+7,496,263	+4,855,290
Volume % Change (YOY)	+15.9%	+33.1%	+18.9%	+21.1%

## ORGANIC CITRUS SALES VS. PRIOR YEAR





# GRAPES

**O**rganic grape sales grew by 11.4% year-over-year in 2025 to reach \$322 million. Volume grew by 11.5% to reach 93 million pounds. The category's premium eased slightly from 30.4% in 2024 to 29.30% in 2025. The combination of double-digit sales and volume growth suggests demand is driving momentum rather than pricing alone.

*"We're seeing the organic consumer base expand beyond traditional niche buyers. More middle-income households, as well as younger generations like millennials and Gen Z, are increasingly driving organic purchases. There is also heightened health awareness and growing skepticism around pesticides, additives and ultra-processed foods."*

**Clarisa Batiz**

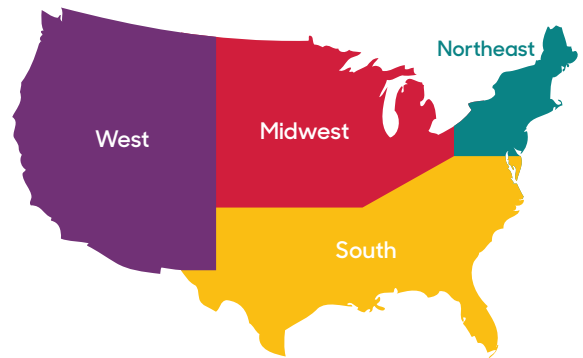
Senior Category Manager

Divine Flavor

INGA SPENCE / ALAMY STOCK PHOTO

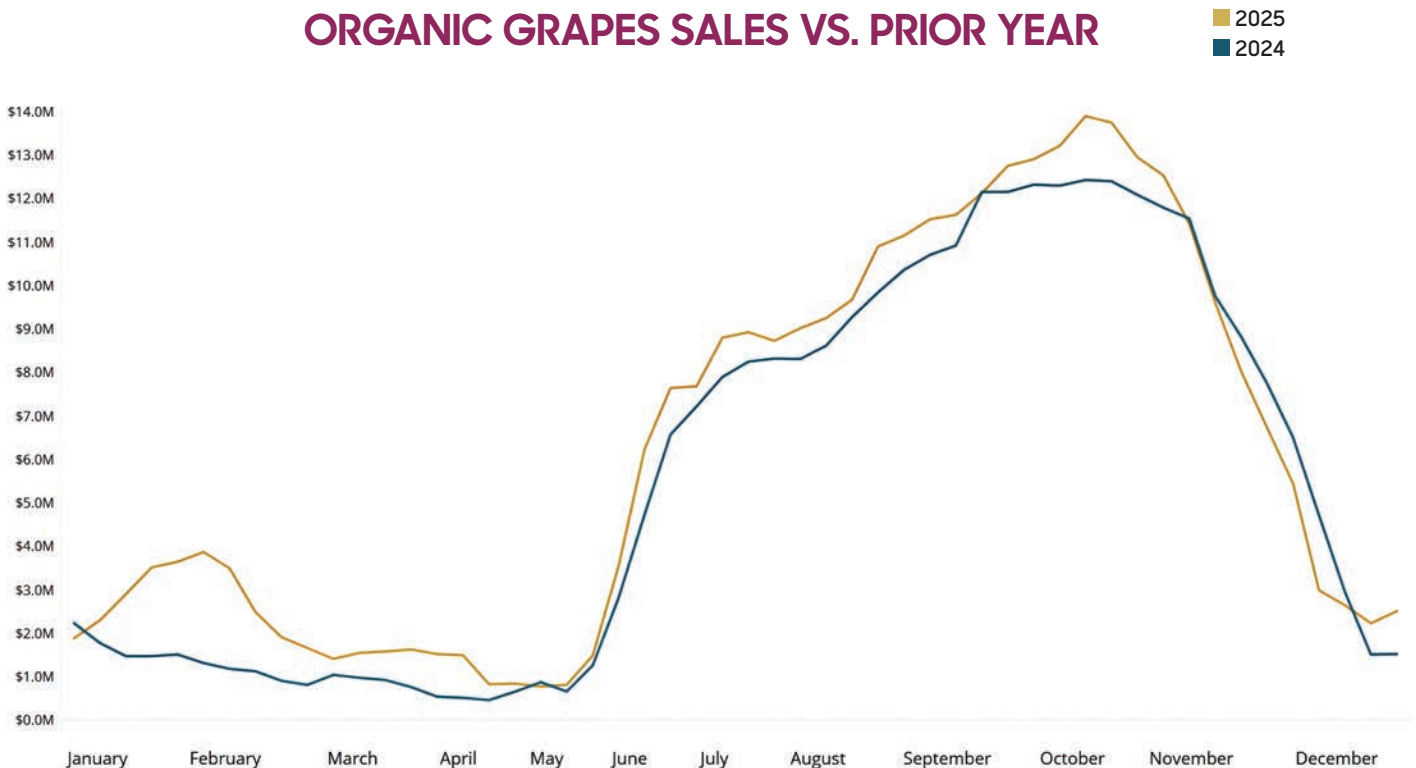
## Regional Performance

Organic grapes grew in both sales and volume sold across the country in 2025. Midwest sales grew by an outstanding 20.4% year-over-year. The Northeast showed the biggest year-over-year volume growth at 25.3%.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$82,728,475</b>	<b>\$50,496,637</b>	<b>\$113,897,162</b>	<b>\$74,630,998</b>
Sales Change (YOY)	+\$6,985,831	+\$8,558,002	+\$10,576,584	+\$6,786,829
Sales % Change (YOY)	+9.2%	+20.4%	+10.2%	+10%
<b>VOLUME (POUNDS)</b>	<b>21,686,485</b>	<b>15,876,276</b>	<b>32,764,544</b>	<b>22,324,905</b>
Volume Change (YOY)	+1,831,617	+2,395,522	+780,662	+4,509,461
Volume % Change (YOY)	+9.2%	+17.8%	+2.4%	+25.3%

## ORGANIC GRAPES SALES VS. PRIOR YEAR



# AVOCADOS

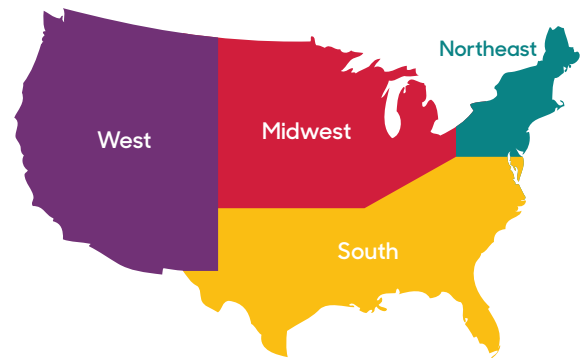
**O**rganic avocado dollar sales improved in 2025, growing by 8.5% to reach \$306 million. Volume also grew by 7.3% year-over-year, reaching 85 million pounds of produce. The premium dropped from 54.7% over conventional in 2024 to 33.7% in 2025.

*"We have seen (in avocados) that demand for organics is less elastic to higher prices versus conventional."*

**Carson McDaniel**  
Vice President  
McDaniel Fruit Co.

## Regional Performance

Sales dollars for **organic avocados** increased across all four regions, most significantly in the Northeast, where they rose by 14.6% year-over-year. The West had the slowest rate of growth at 2%.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$114,742,620</b>	<b>\$40,086,940</b>	<b>\$89,327,702</b>	<b>\$61,359,957</b>
Sales Change (YOY)	+\$2,225,755	+\$4,142,433	+\$9,837,431	+\$7,836,446
Sales % Change (YOY)	+2%	+11.5%	+12.4%	+14.6%
<b>VOLUME (POUNDS)</b>	<b>29,879,903</b>	<b>12,020,915</b>	<b>25,780,005</b>	<b>17,207,855</b>
Volume Change (YOY)	-706,956	+1,834,262	+2,711,570	+1,934,282
Volume % Change (YOY)	-2.3%	+18%	+11.8%	+12.7%

# MUSHROOMS

Organic mushroom sales were up slightly in 2025, growing by just 0.6% to reach \$262 million. Volume grew by 5.6% year-over-year to reach 40 million pounds. Mushrooms sold at an average price premium of 44.2% higher than conventional mushrooms.

*"Organic mushrooms continued to show stronger resilience compared to conventional—reinforcing their role as a trusted premium staple."*

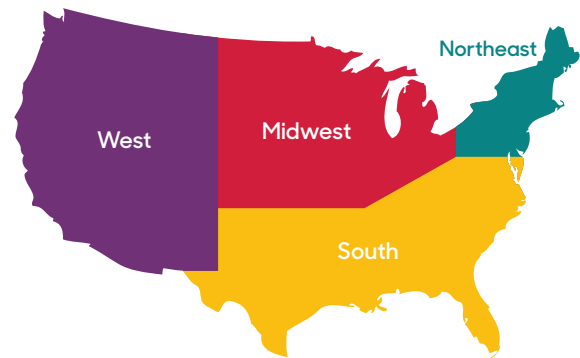
**Sabrina Pokomandy**

Director of Business Development and Marketing

Highline Mushrooms

## Regional Performance

Organic mushroom sales increased in two regions and decreased in two regions. The South experienced the largest sales growth with a 4.5% year-over-year change, while sales in the West slowed by -1.7%.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$78,082,717</b>	<b>\$67,081,712</b>	<b>\$77,371,072</b>	<b>\$39,383,111</b>
Sales Change (YOY)	-\$1,376,446	-\$719,328	+\$3,348,326	+\$349,882
Sales % Change (YOY)	-1.7%	-1.1%	+4.5%	+0.9%
<b>VOLUME (POUNDS)</b>	<b>10,947,473</b>	<b>12,044,127</b>	<b>12,022,344</b>	<b>4,706,145</b>
Volume Change (YOY)	-28,310	+309,050	+1,585,079	+242,323
Volume % Change (YOY)	-0.3%	+2.6%	+15.2%	+5.4%

#13 IN SALES

# ONIONS

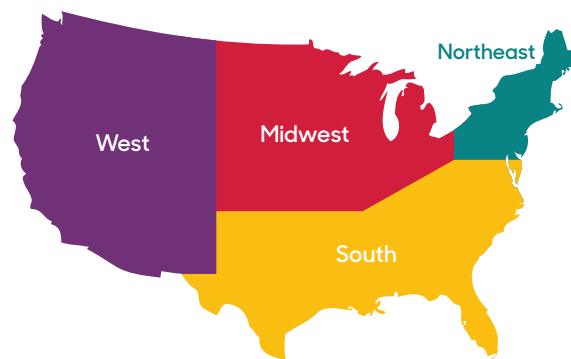
Organic onion sales changed course last year, going from a dollar growth of 6.5% in 2024 to a 1.1% loss in 2025 to settle at \$252 million. Volume was down slightly, by 0.7%, while the price premium over conventional onions grew from 60.9% to 68.40%.

"We have seen some interesting shifts at the retail level over the past year. More of our retail partners are expanding their organic onion offerings, with some moving toward carrying organic exclusively in bulk while transitioning conventional varieties to bagged formats. Pricing strategy is also evolving, with retailers becoming more competitive on organic pricing to attract and retain shoppers."

**Kelsey Weingart**  
Brand Manager  
Peri & Sons Farms

## Regional Performance

Organic onion sales grew very modestly in the Midwest and South while declining slightly in the West and Northeast in 2025. Regional volume growth followed a similar pattern.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$75,962,371</b>	<b>\$32,486,795</b>	<b>\$84,513,121</b>	<b>59,422,167</b>
Sales Change (YOY)	-\$2,028,711	+\$418,243	+\$112,616	-\$1,316,254
Sales % Change (YOY)	-2.6%	+1.3%	+0.1%	-2.2%
<b>VOLUME (POUNDS)</b>	<b>29,190,098</b>	<b>14,077,503</b>	<b>40,193,441</b>	<b>21,287,102</b>
Volume Change (YOY)	-1,186,930	+80,585	+314,985	-6,639
Volume % Change (YOY)	-3.9%	+0.6%	+0.8%	0%

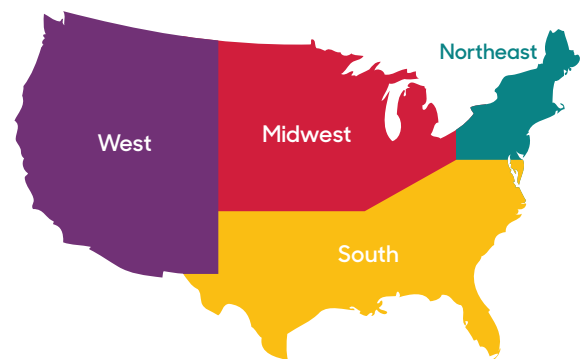
# CUCUMBERS

Organic cucumber sales growth continued to be strong in 2025, growing by 9.7% over 2024 to reach \$237 million. Volume grew as well, increasing by 15.1% to reach 63 million pounds. Organic cucumbers have the second-highest price premium across all produce categories, at 124.3% above conventional cucumbers.

*With sales growing by nearly 10% year-over-year, organic cucumbers sell at a 124.3% price premium over conventional, the second-highest premium among produce.*

## Regional Performance

Organic cucumber sales soared across the country, growing by 9.7% in terms of dollars—reaching \$237 million—and 15.1% in terms of volume. The Midwest volume grew at the fastest rate (12.9%), but it was the West that sold the highest volume of organic cucumbers, increasing by 20.1% year-over-year.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$69,493,354</b>	<b>\$33,875,696</b>	<b>\$72,700,374</b>	<b>\$60,152,306</b>
Sales Change (YOY)	+\$5,577,131	+\$3,772,496	+\$6,187,875	+\$5,333,821
Sales % Change (YOY)	+8.7%	+12.5%	+9.3%	+9.7%
<b>VOLUME (POUNDS)</b>	<b>21,173,786</b>	<b>8,851,794</b>	<b>19,459,453</b>	<b>13,596,728</b>
Volume Change (YOY)	+3,536,873	+1,014,421	+2,095,005	+1,635,716
Volume % Change (YOY)	+20.1%	+12.9%	+12.1%	+13.7%

#15 IN SALES

# BROCCOLI

Organic broccoli sales grew by 5.7% year-over-year in 2025 to reach \$230 million. While that's solid growth, it's a noticeable slowdown from 2024, when sales soared 9%. The category held onto its solid price premium, with organic broccoli selling at 66.5% higher than conventional broccoli.

*"Although smaller in volume, baby broccoli continues to become known across the organic vegetable category with mid-20% volume growth."*

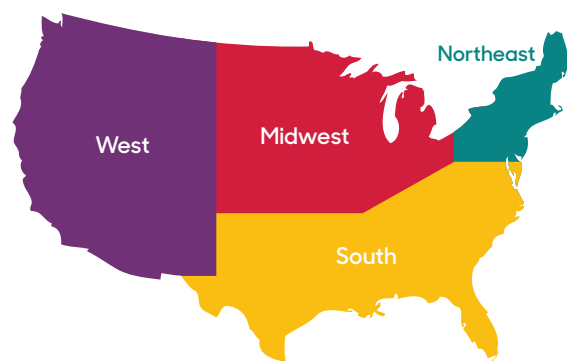
**Bob Borda**

SVP of Category Sales, Organic Vegetables

Grimmway Farms

## Regional Performance

Organic broccoli sales grew across the country in 2025, as they did in 2024. Midwest sales grew the fastest, at 13.3% year-over-year. The West only just tipped into the positive column with a rate of 0.1%



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$80,143,531</b>	<b>\$29,301,248</b>	<b>\$65,982,617</b>	<b>\$54,101,363</b>
Sales Change (YOY)	+\$116,266	+\$3,428,284	+\$4,586,705	+\$4,204,519
Sales % Change (YOY)	+0.1%	+13.3%	+7.5%	+8.4%
<b>VOLUME (POUNDS)</b>	<b>21,358,472</b>	<b>7,714,647</b>	<b>15,181,415</b>	<b>12,040,365</b>
Volume Change (YOY)	-1,586,353	+794,954	+719,744	+812,041
Volume % Change (YOY)	-6.9%	+11.5%	+5.0%	+7.2%



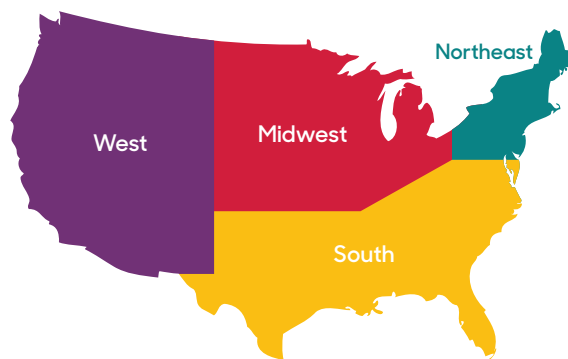
# BELL PEPPERS

**A** cool 1 million more pounds of organic bell peppers sold in 2025, growing by 2% year-over-year from 2024. However, sales dollars decreased by 1.1%, clocking in at \$203 million, from the previous year. While the price premium dropped by nearly 10%, organic bell peppers still retained a 44.6% price premium over conventional peppers.

*In 2025, 1 million more pounds of organic bell peppers were sold than in 2024.*

## Regional Performance

**Organic bell pepper** sales were down in every region except the South, where sales rose at a rate of 4.6%. Sales slipped the most in the West, where they sank by -5.9%, year-over-year.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$62,640,388</b>	<b>\$30,204,548</b>	<b>\$69,779,361</b>	<b>\$40,314,373</b>
Sales Change (YOY)	-\$3,936,918	-\$587,206	+\$3,063,767	-\$847,108
Sales % Change (YOY)	-5.9%	-1.9%	+4.6%	-2.1%
<b>VOLUME (POUNDS)</b>	<b>15,254,521</b>	<b>7,578,569</b>	<b>15,446,835</b>	<b>7,671,003</b>
Volume Change (YOY)	-89,124	-553,607	+1,540,820	+73,249
Volume % Change (YOY)	-0.6%	-6.8%	+11.1%	+1.0%

ROBERT COY / ALAMY STOCK PHOTO

#17 IN SALES

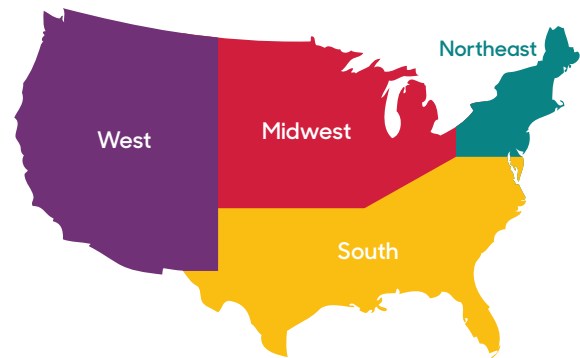
# CELERY

Organic celery sales continued to grow in 2025, expanding at a rate of 5.9% year-over-year to reach \$175 million. Volume sales increased by 6% year-over-year. With one of the more approachable premiums in the organic aisle, celery maintained momentum, growing in both dollar sales and volume.

Organic celery grew in sales and volume in 2025, with consumers enjoying one of the most accessible premiums among organic produce.

## Regional Performance

Organic celery sales grew coast-to-coast in 2025, with the Midwest and South posting the greatest year-over-year dollar increases, of 6.7% and 6.8%, respectively.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$44,744,165</b>	<b>\$28,375,744</b>	<b>\$57,302,296</b>	<b>\$44,631,213</b>
Sales Change (YOY)	+\$2,170,891	+\$1,784,533	+\$3,659,476	+\$2,159,068
Sales % Change (YOY)	+5.1%	+6.7%	+6.8%	+5.1%
<b>VOLUME (POUNDS)</b>	<b>13,956,414</b>	<b>8,778,700</b>	<b>18,041,461</b>	<b>12,337,471</b>
Volume Change (YOY)	+682,505	+342,914	+1,521,956	+476,091
Volume % Change (YOY)	+5.1%	+4.1%	+9.2%	+4.0%

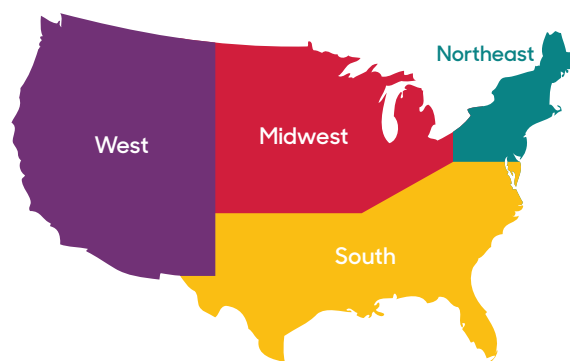
# SQUASH

Sales of organic squash reached \$141 million in 2025, with a growth rate that shot up from 1.4% in 2024 to 6.2% last year. Volume zoomed too, up from nearly flat year-over-year growth in 2024 to 11% in 2025. The premium remained solid, with organic squash selling for 66.6% more than conventional squash.

*Sales growth spiked from 1.4% in 2024 to 6.2% in 2025.*

## Regional Performance

Organic squash sales grew across every region in 2025, with the South and Midwest growing the most quickly, at 10.3% year-over-year and 9.5%, respectively.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$47,631,020</b>	<b>\$16,427,250</b>	<b>\$44,442,734</b>	<b>\$32,866,018</b>
Sales Change (YOY)	+\$977,799	+\$1,422,209	+\$4,142,401	+\$1,680,498
Sales % Change (YOY)	+2.1%	+9.5%	+10.3%	+5.4%
<b>VOLUME (POUNDS)</b>	<b>20,768,910</b>	<b>6,746,766</b>	<b>15,822,156</b>	<b>10,452,840</b>
Volume Change (YOY)	+1,526,454	+961,231	+2,296,200	+622,088
Volume % Change (YOY)	+7.9%	+16.6%	+17%	+6.3%

STEVE CAVALIER / ALAMY STOCK PHOTO

#19 IN SALES

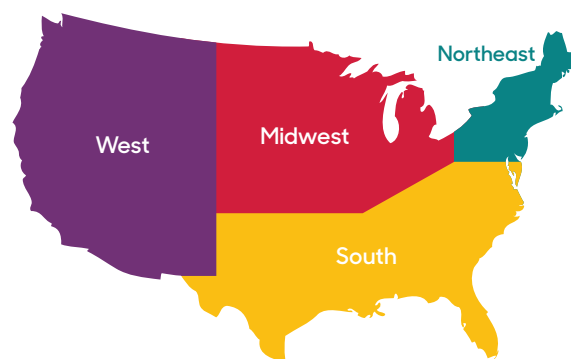
# GREEN BEANS

**W**ith a spectacular year-over-year growth increase of 25.4%, organic green beans made it into the top 20 categories of 2025. Sales reached \$121 million. Volume increased at an impressive rate as well, growing by 37% year-over-year since 2024. Organic green beans sold for a price premium of 53.4% over conventional green beans.

*Organic green bean sales grew by 25.4% year-over-year.*

## Regional Performance

While **organic green bean** sales grew in the double digits across the country, the Midwest posted the most stunning rate of 46.2% year-over-year. The volume sold also shot up nationwide.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$21,899,659</b>	<b>\$16,560,780</b>	<b>\$52,168,712</b>	<b>\$30,188,806</b>
Sales Change (YOY)	+\$3,603,214	+\$5,230,273	+\$11,327,243	+\$4,307,152
Sales % Change (YOY)	+19.7%	+46.2%	+27.7%	+16.6%
<b>VOLUME (POUNDS)</b>	<b>5,105,486</b>	<b>3,954,980</b>	<b>12,417,694</b>	<b>6,179,235</b>
Volume Change (YOY)	+1,277,138	+1,574,438	+3,457,203	+1,111,084
Volume % Change (YOY)	+33.4%	+66.1%	+38.6%	+21.9%

#20 IN SALES

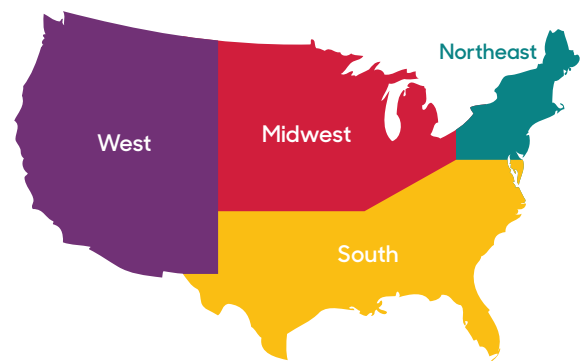
# KALE

Organic kale rounds out the list of 20 best performing categories with \$105 million in sales in 2025. Total sales were down by 2% from 2024. In 2025, 5.7% less volume sold as well. Organic kale did, however, hold onto a price premium of 59.1% over its conventional counterpart.

Organic kale sales decreased in every region except the South in 2025.

## Regional Performance

While sales of **organic kale** grew by 1.7% in the South, the other regions saw decreased sales in 2025. Volume sold decreased across the country, with the West experiencing the biggest reduction, with -8.4%.



Region	West	Midwest	South	Northeast
<b>SALES</b>	<b>\$38,411,201</b>	<b>\$10,442,914</b>	<b>\$32,511,002</b>	<b>\$23,697,533</b>
Sales Change (YOY)	-\$1,725,205	-\$103,800	+\$535,459	-\$788,756
Sales % Change (YOY)	-4.3%	-1%	+1.7%	-3.2%
<b>VOLUME (POUNDS)</b>	<b>12,687,695</b>	<b>3,225,260</b>	<b>7,202,811</b>	<b>5,100,165</b>
Volume Change (YOY)	-1,161,616	-159,487	-84,798	-283,807
Volume % Change (YOY)	-8.4%	-4.7%	-1.2%	-5.3%

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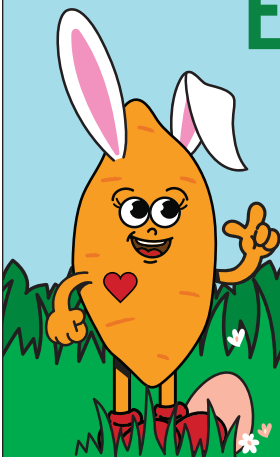
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# RETAILER & WHOLESALER SNAPSHOTS



MBI / ALAMY STOCK PHOTO

# RETAILER & WHOLESALER SNAPSHOTS

Inflation and weather remained top concerns throughout 2025. Conveying the value of organic remained critical, and understanding the different consumer segments to message effectively was also an area of focus.



"Increasing growing/shipping costs without equivalent increases in FOB prices is leading to challenges across the produce industry... Agriculture loans domestically and internationally are harder to get as the stability is in question. These are loans many rely on to jump-start their seasons. Tariffs and the potential volatility, along with low prices domestically, are encouraging international growers to seek more stable options and seek markets other than the U.S."

**Ben Johnson**  
*President*  
**Bridges Produce**

"Organic is not just a category, it is a mindset."

**Tom Barnes**  
*President and CEO*  
**Category Partners**



"If you are looking to future-map your business, you are going to see major shifts in spending power. Really keep your eye on millennials and Gen Z, what they are looking for and how organic continues to play into their lives. This will impact how you message and how you message to them."

**Sherry Frey**  
*Vice President of Total Wellness*  
**NielsenIQ**

"While organic is well recognized for its 'no pesticides' image, a significant gap exists between what consumers value and are willing to pay for and what brands emphasize in marketing. This creates an opportunity to better highlight organic's animal welfare practices, the absence of antibiotics and hormones in products and even the growing body of research highlighting its nutritional benefits."

**Sandy Pfaff**

*Media Relations Director*  
**Organic Trade Association**

"Driving education around the value of organic, strengthening in-store storytelling and merchandising organics as everyday meal solutions will be key to increasing household penetration. From a retail execution standpoint, integrating organics alongside conventional sets within planograms—rather than separating them—can improve visibility, encourage trial and support trade-up within the category."

**Sabrina Pokomandy**

*Director of Business Development and Marketing*  
**Highline Mushrooms**



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# HOT-BUTTON TOPICS



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# HOT-BUTTON TOPICS

As the organic produce industry expands, it must navigate a growing list of challenges. In 2025, that list included unpredictable political shifts that impacted organic business, labor shortages and climate change-driven weather volatility.



"Shoppers are more interested than ever in where their food comes from and how it is grown, but price sensitivity is real. The industry as a whole benefits when retailers, growers and marketers work together to communicate the value of organic clearly and price it in a way that does not feel out of reach for everyday shoppers."

**Kelsey Weingart**  
Brand Manager  
Peri & Sons Farms

"There's increasing scrutiny around greenwashing, which puts organic brands at risk if their packaging or sustainability claims aren't backed by credible certification and performance data."

**Becky Smith**  
Columbia Packaging Group



**"Our primary concerns remain at the farm level. Labor availability, water access and increasingly unpredictable weather continue to challenge growers. These pressures can be significant, and the long-term success of the organic industry depends on the continued viability and success of our farms and growers."**

**Scott Mabs**  
CEO  
Homegrown Organics

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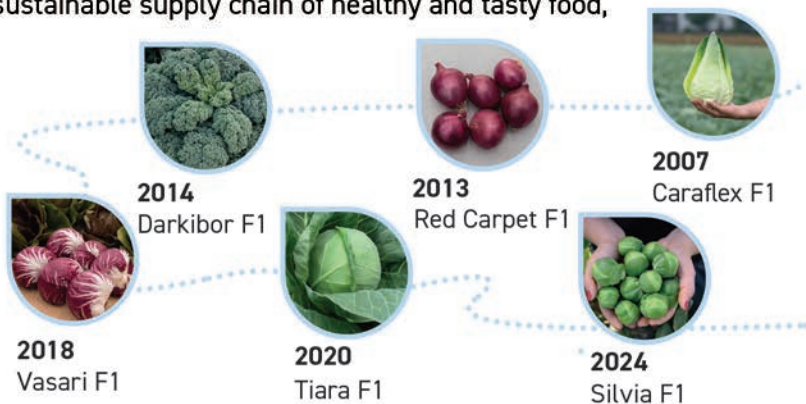
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## BEJO USA CELEBRATES 20 YEARS OF ORGANIC SEED

In the 1990s, Bejo was among the first breeders to take the step to make organic an integral part of its business. As a family company we believe and are committed to this long term and sustainable approach. 2025 marks an important milestone for organic seed at Bejo USA, celebrating 20 years of contributing to a sustainable supply chain of healthy and tasty food, **RIGHT from the START!**

Bejo USA & Canada | Chelsey Lenczyk  
Organic Lead, Home & Farm Market Manager  
T: 267-838-0078 | E: c.lenczyk@bejoseeds.com



"One of the most pressing concerns is the continued pressure on production costs. Organic growers are still navigating higher labor, input and certification expenses, and those costs are difficult to absorb without pushing retail prices beyond what many consumers are willing to pay. At the same time, economic uncertainty is influencing shopper behavior, and value-driven consumers may trade down if organic price gaps widen too far. Another challenge is supply consistency. Weather volatility, water constraints and shifting acreage all create unpredictability in availability. Retailers want reliable volume and quality, and any disruption can weaken consumer trust or shelf presence."

**Chuck Sinks**

*President of Sales and Marketing*  
**Honeybear Brands**

"Consumers are increasingly seeking crunch and structure, and new organic field-grown varieties are resonating because they deliver that satisfying eating experience at an accessible price point."

**Bob Borda**

*SVP of Category Sales, Organic Vegetables*  
**Grimmway Farms**

"While we have seen an increase in regenerative claims, the consumer research does not show trust or a willingness to pay for them. The USDA Organic seal continues to be the most trusted certification and leads the way as health-minded shoppers seek products—including a high priority on produce—that are both good for them and the planet. They want fruits, vegetables and leafy greens that are produced without synthetic and persistent toxic chemicals—both for their health and for soil health."

**Tom Chapman**

*Co-CEO*  
**Organic Trade Association**





MICHAEL STEELMAN/ORGANIC PRODUCE SUMMIT

# 2025 EVENTS IN REVIEW

## OPS

Organic  
Produce  
Summit

July 9 to 10,  
2025

## OGS

Organic  
Grower  
Summit

December 3 to 4,  
2025

# COMING IN 2026

## OPS

Organic  
Produce  
Summit

July 14 to 16,  
2026

## OGS

Organic  
Grower  
Summit

December 2 to 3,  
2026

For more organic produce news  
and to sign up for the OPN Connect  
weekly newsletter, please visit  
[organicproducenetwork.com](https://www.organicproducenetwork.com).



## Organic Produce Summit



A record crowd gathered at the 2025 Organic Produce Summit (OPS) to talk business and connect at the annual event. The summit was held July 9 to 10 in Monterey, California.

"This year we celebrated a significant milestone as we hosted the most expansive and well-attended summit in the event's history," said Keigan Roos, event manager at Informa Markets. "We hosted a record-breaking 202 exhibitors, featuring an impressive array of growers, shippers and processors showcasing organic products. The event's growing appeal

was further demonstrated by the 40 companies who made their debut appearance as first-time exhibitors." The exhibitor floor sold out.

Many OPS sessions focused on retail trends, but growers also took to the stage to discuss both challenges and opportunities at the farm level. Keynote speaker Timothy Childs, founder and co-CEO of Nutri8, predicted that AI will soon be in everything and everywhere. "The acceleration is exponential," he said. "We are looking at job displacement, industry automation and workforce reduction."

His best advice? "If you're not using AI yet, start now," he said.

Organic Produce Summit 2026 will be held July 14 to 16 in Monterey, California.

***"Partner with AI to take market share away from conventional food and grow organic produce market share."***

**Timothy Childs,**  
Founder and Co-CEO  
**Nutri8**



MICHAEL STEELMAN (4)/ORGANIC PRODUCE SUMMIT (4)



*"Price point is going to drive a lot of consumer behavior. If prices between organic and conventional get closer, people will switch to organic to become healthier. And you will see a greater look at what's happening on the farm."*

**Jeff Huckaby**, President, Grimmway Farms





# ORGANIC GROWER SUMMIT™

by Farm Progress®



The 2025 Organic Grower Summit (OGS) at the Hyatt Regency Hotel & Spa in Monterey, California, brought together industry leaders, growers and innovators from 30 U.S. states and four countries to explore the latest trends and technologies

shaping the organic agriculture landscape. The two-day event provided the unique opportunity for over 500 attendees to network and learn amongst the most influential movers and shakers in the organic industry.

The summit kicked off with an inspiring keynote by Sylvia Tawse, founder and chief fresh officer at the Fresh Ideas Group. Her address, "Unsung Heroes in Organic—How to Apply Their Legacies to Your Organic Success," set the tone for the event by highlighting the challenges and triumphs that have shaped the \$71 billion organic industry. The summit concluded with a data-driven keynote by Walt Duflock, senior vice president of technology at Western Growers, showcasing future-focused solutions to the industry's pressing challenges.

Attendees chose from a dozen seminars that tackled critical topics such as labor shortages, sustainability and the integration of advanced technologies in organic farming. Afternoon activities included a trade show, an ag tech showcase featuring live presentations of cutting-edge organic farming innovations and a demonstration of a California Department of Food and Agriculture plant inspection dog that thrilled conference-goers.

During the conference, Arnott Duncan, founder of Duncan Family Farms in Goodyear, Arizona, was honored as the 2025 Grower of the Year, sponsored



RACHEL BUECHLER (4)/ORGANIC GROWER SUMMIT (4)



by John Deere. As part of the new awards format, the four finalists were hosted to the event and were part of a humble and informative panel discussion led by Jenny Lester Moffitt, vice president at American Farmland Trust and former Under Secretary at USDA,

that offered behind-the-scenes insights into each of their impressive operations.

The 2026 Organic Grower Summit will be held in Monterey from December 2 to 3, 2026. Sign up for updates at [organicgrowersummit.com](http://organicgrowersummit.com).

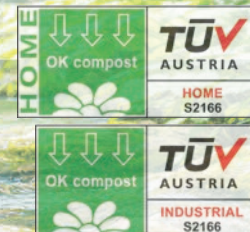
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ORGANIC  
PRODUCE  
SUMMIT

July 14-16, 2026

Monterey Conference Center | Monterey, CA

# Fresh Perspectives, Fresh Connections

## Discover What's New at OPS 2026


This year, we're celebrating 10 years of Organic Produce Summit with exciting new features and expanded opportunities to connect, learn, and grow. Here's what's fresh for 2026:


- **Expanded 3-Day Format:** More time to network, learn, and explore.
- **OPS Event App:** Plan your experience, access on-demand content, and stay connected.
- **Special Events:** Yoga on the Beach, Keynotes at a Historic Theater, and a Women's Networking Event.
- **Enhanced Trade Show Floor:** Discover the latest innovations and meet top organic brands.

Don't miss this milestone event where the organic produce industry comes together to celebrate a decade of innovation and collaboration.



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Organic Produce Network

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**Organic Produce Summit**

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**July  
14 to 16  
2026**

Monterey Conference Center  
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**December  
2 to 3  
2026**

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