ORGANIC AGRICULTURE

EXPLORING BARRIERS AND SOLUTIONS

2025 PRODUCER INSIGHTS

OCIA INTERNATIONAL

THINK REGENERATION

United States Department of Agriculture
Agricultural Marketing Service
National Organic Program
Transition to Organic Partnership Program

USDA ORGANIC

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EXECUTIVE SUMMARY

Think Regeneration conducted research for the Organic Crop Improvement Association (OCIA), as part of the USDA TOPP program. The goal of the research is to understand barriers to organic agriculture in the Great Plains beyond common factors like cost and complexity.

We interviewed 19 farmers, ranchers, and agriculture professionals in the Great Plains, surveyed 152 farmers and ranchers nationwide (86 in the Great Plains), and met with 19 additional agriculture professionals to review insights and discuss solutions.

Throughout the report, we will often refer to three segments of producers:

Certified Organic are producers who report that at least part of their operation is USDA Certified Organic.

Non-Certified Organic are producers who report that they are using organic practices in their operation, but do not have acreage that is USDA Certified Organic.

Non-Organic are producers who report that they are not using organic practices in their operation.

KEY INSIGHTS

Our research surfaced the following:

Markets and values drive practices. Producers generally fall into two categories: those primarily driven by economic opportunity (markets) and those driven by human and environmental health (values). Large-scale certified organic producers–those with over 100 acres–tend to be more market- motivated. Smaller-scale certified organic producers and non-certified organic producers tend to be more values-motivated.

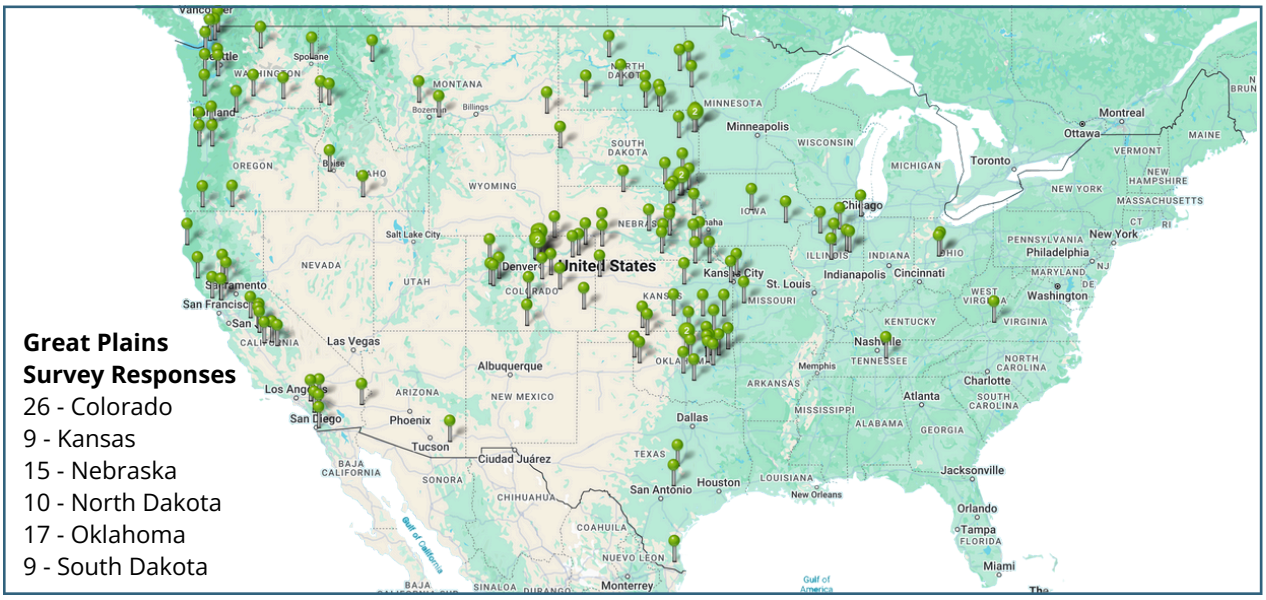
Markets need to evolve. Current organic markets favor large-scale operations. Producers want more market opportunities, especially for specialty crops and proteins. Smaller operations show more interest in food-as-medicine markets, while larger producers focus on commodity markets but are open to shifts where economic incentives exist.

Outcomes outweigh practices for some. Non-certified organic producers align more closely with regenerative-organic practices. These producers make decisions based on environmental and health outcomes, measuring factors like biodiversity, human health, soil health, and nutrient density and they incorporate more diversity in crops, animals, and seed varieties.

Producers need financial and educational support. Producers face significant burdens and financial risks. Financial incentives and support networks need to shift to provide producers with markets, health, and living wages. Smaller scale producers are especially struggling.

RESPONDENT PROFILE

Within the online survey, we collected data from 152 respondents across the United States with 86 in the Great Plains.



The data was analyzed from many different angles including geographic location, age, gender, and organic status. We saw the most variation based on organic status. For this reason, throughout this document we will highlight where there is variation in response based on organic status. There are three main segments.*

57%

Certified Organic are producers who report that at least part of their operation is USDA Certified Organic. In some cases we will also highlight certified organic producers with 100 or less acres compared to more than 100 acres.

19%

Non-Certified Organic are producers who report that they are using organic practices in their operation, but do not have acreage that is USDA Certified Organic.

20%

Non-Organic are producers who report that they are not using organic practices in their operation.

*4% survey respondents are in another category and are not large enoguh as a group to report as a segment.

RESPONDENT PROFILE

ROLE


89% Farmer **11%** Rancher

ACREAGE

22%	0 to 10
21%	11 to 100
11%	101 to 250
11%	251 to 500
9%	501 to 1,000
18%	1,001 to 5,000
7%	Over 5,000

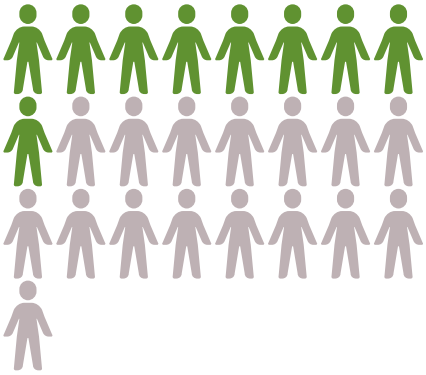
TENURE

1%	Less than one year
10%	1 to 3 years
14%	4 to 7 years
17%	7 to 10 years
59%	More than 10 years

SUCCESSION

70%
Parents or grandparents were farmers

2ND JOB



36%
Work an off-farm/ranch job

AGE

4%	18-29
16%	30-39
24%	40-49
24%	50-59
19%	60-69
10%	70-79
1%	80+

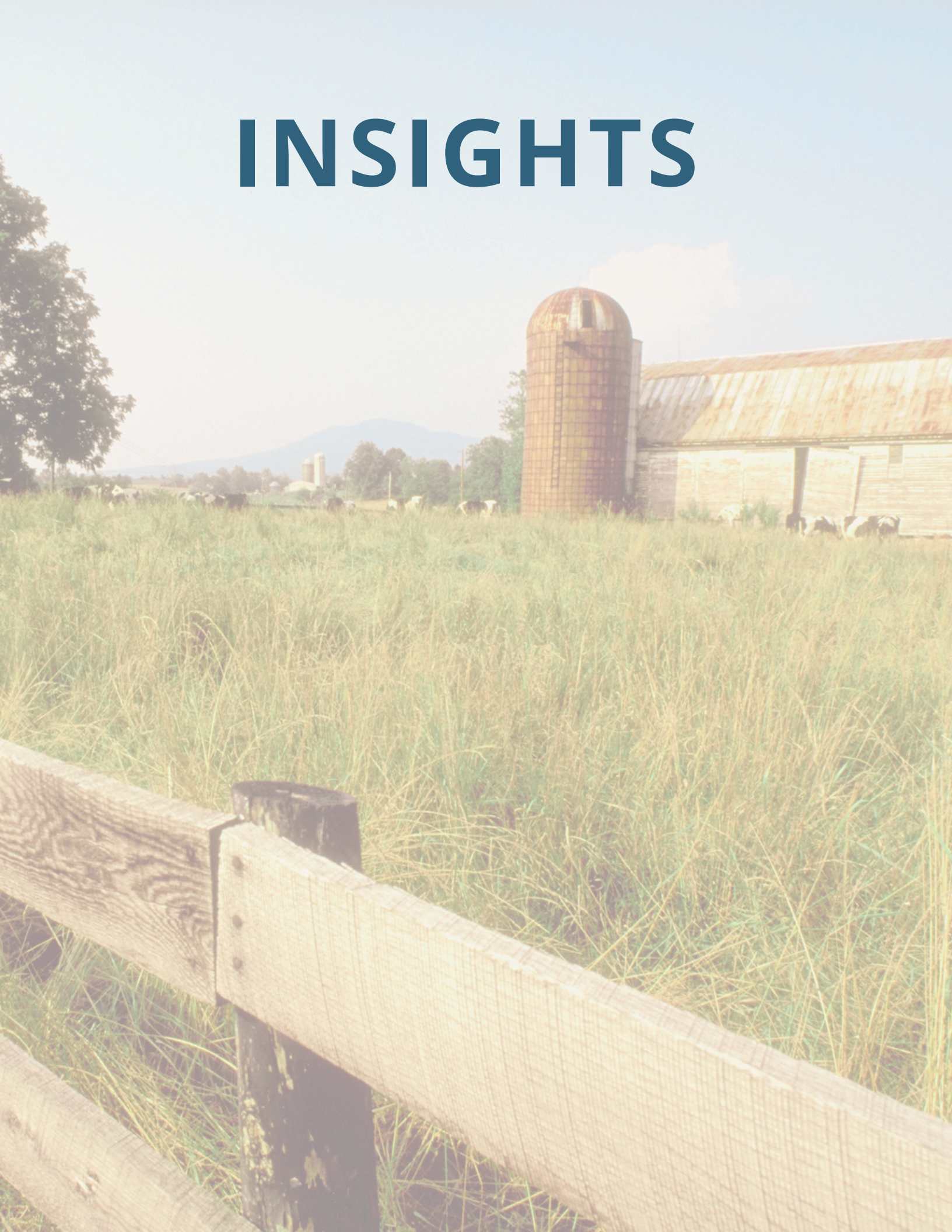
ETHNICITY

90%	White
4%	Multiple/Other
2%	American Indian
2%	Asian/Pac. Islander
1%	Black
1%	Hispanic

GENDER

64%	Male
36%	Female
1%	Other

INSIGHTS



FARMING MOTIVATIONS & GOALS

To begin, we looked at why farmers and ranchers are doing this work—their overall farming motivations. Across all respondents, they said **their primary motivations are to make a living for their family and to improve the environment.**

Most Describes Me:

	All States n=152	Plains States n=86	Non-Plains States n= 66
I want to make a living for my family	25%	22%	29%
I want to improve the health of the environment through my farming/ranching practices	22%	19%	26%
I want to improve my land and leave it better than I found it	18%	23%	11%
I want to improve my own health and/or the health of my family with the food I grow	14%	17%	11%
I want to carry on the legacy of farming/ranching in my family	12%	12%	12%
I want to improve my community	9%	7%	12%

Motivations among certified organic producers overall align with the response across all states. However, when we dug into this group by the size of their operation, we saw key differences in what is driving them.

Medium and large-scale certified organic producers–**those with over 100 acres in production–were more likely to say they are doing this work to make a living for their family.** In fact, this is the top reason given for producers in this segment.

The top motivation for smaller scale producers–**those with 100 acres or less in their operation–is environmental health,** and the second most reported motivation is to improve their community.

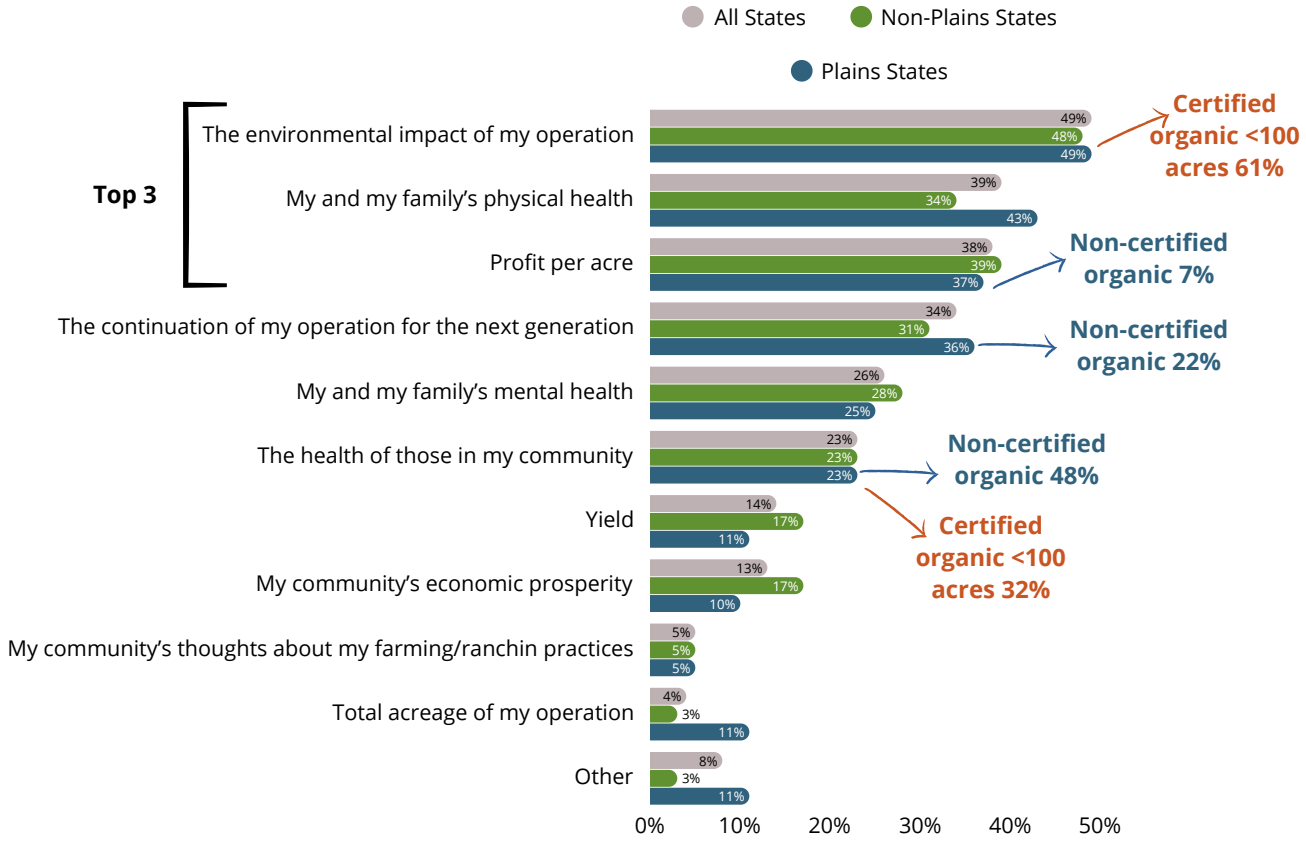
	Certified Organic	
	< 100 Acres n=31	>100 Acres n=50
I want to make a living for my family	13%	**36%**
I want to improve the health of the environment through my farming/ranching practices	**39%**	12%
I want to improve my community	**19%**	2%

Notably higher versus comparable segment.

Q10. Thinking about your farm or ranch and why you do the work you do, please review the following statements.Of these statements, please select which one most describes why you do this work and which one least describes why you do this work.

FARMING MOTIVATIONS & GOALS

When we look at the goals for their operation, the one thing that is most important to these producers is the environmental impact on the farm. **49% overall say environmental impact is a top goal for their operation.** Closely behind that are their and their family's physical health (39%), profit per acre (38%), and the continuation of their operation for the next generation (34%).



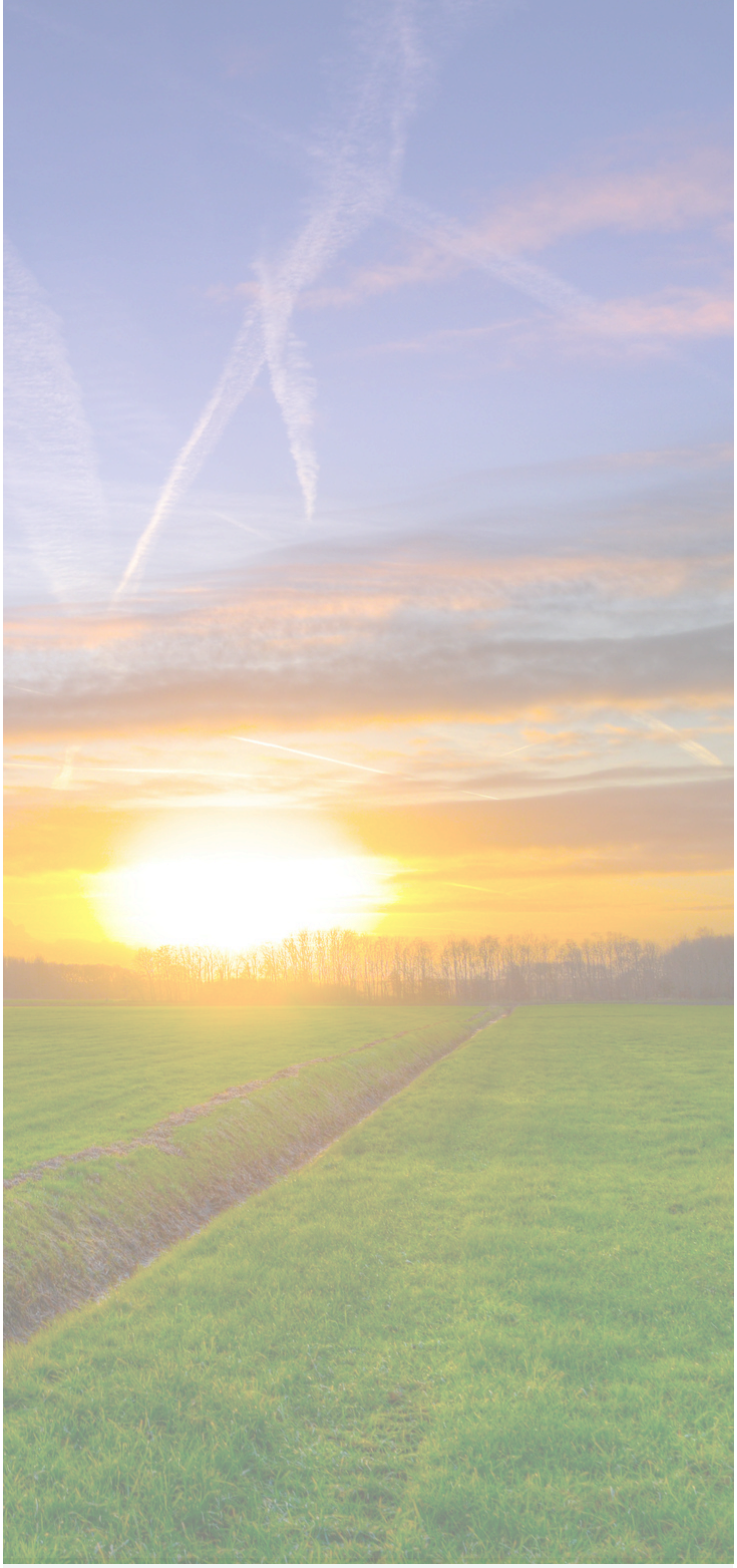
There are some notable variations by segment:

Non-certified organic producers place a higher priority on the health of those in their community health (48%), and unlike the other groups, they are much less motivated by the continuation of their operation for the next generation (22%) and profit per acre (7%).

Overall, the certified organic and non-organic segments' operational goals look very similar. **Non-organic** producers have a a bit more concentration among the top choices. 58% overall say environmental impact is a top goal for their operation, followed by their family's physical health (50%), profit per acre (50%), and the continuation of their operation for the next generation (42%).

Smaller scale certified organic operators are much more driven by environmental impact (61%) and the health of those in the community (32%). This contrasts starkly with larger scale certified organic operators where 40% have environmental goals and only 10% have community health goals.

Q11. When you think about the goals of your operation, which of the below are most important to you? Please select up to three choices.



QUOTE

"I hope our farm can leave behind a long lasting impact on family, friends, and community that we tried our best to better the environment and local economy. I hope my children can learn to not only treat the land properly but to also to treat others well and to give back to the community when able. I hope people look back and remember our family name and farm as one of the ones they could always call for advice or a helping hand."

OPERATIONAL LEGACY

Interestingly, when we asked producers to describe their legacy, very similar themes emerged regardless of certification status.

Sustainability and Land Stewardship: Producers aim to improve soil health, enhance ecosystems, and engage in responsible land and resource management.

Community Impact: Producers recognize their role in a profession at a crossroads. They want to demonstrate that farming can still be a way of life and that nutritious food comes from the soil. They hope to inspire the next generation to pursue careers in agriculture.

Farm Continuity: They hope to keep the land in agriculture and pass on a farm that is thriving–both environmentally and economically sustainable.

Quality and Ethical Production: Producers want to improve the quality of food, while treating animals humanely. They aim to offer products that are healthy, local, and ethically sourced, aligning their values with their business practices.

A Model for Others: They want to create a replicable, profitable model for others in the industry, sharing their knowledge and methods for others to follow.

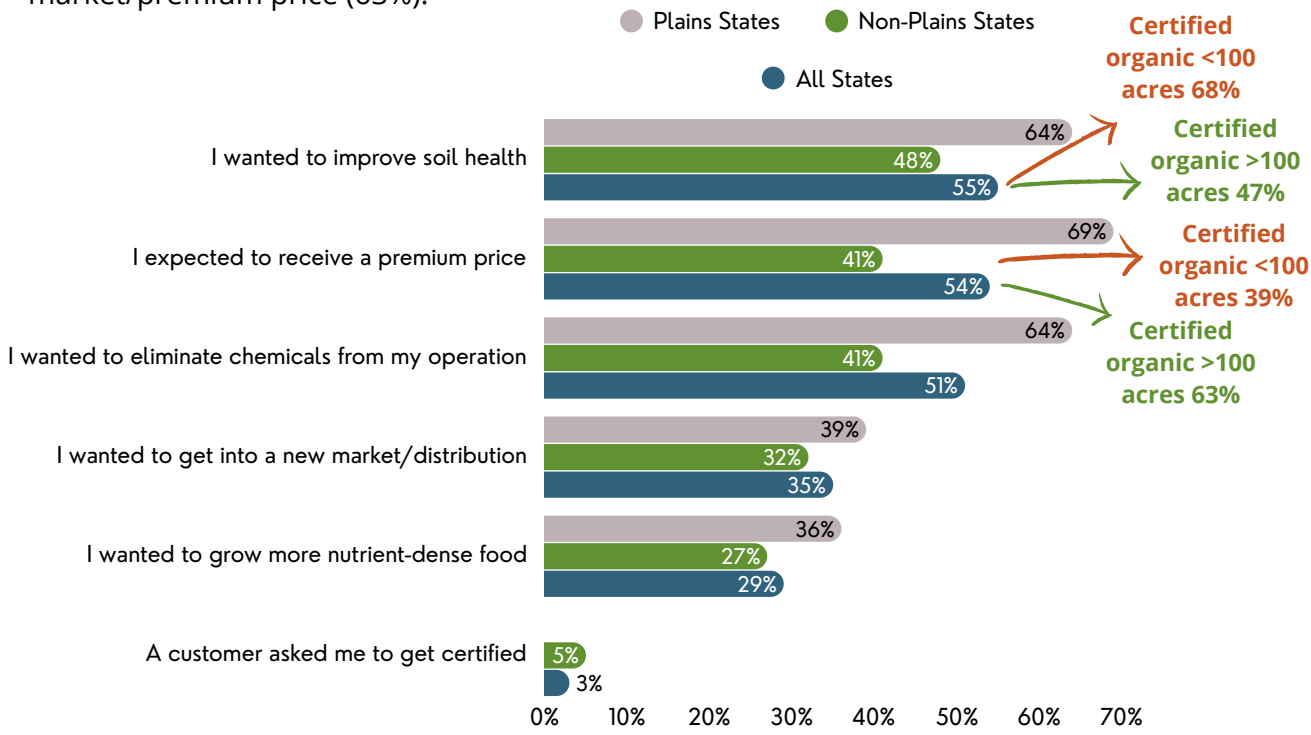
Q12. What do you want the legacy of your farm or ranch to be? Please describe it in as much detail as possible.

ORGANIC MOTIVATIONS

Next we turn to the USDA organic certified producers in our study to understand what motivated them to move to organic practices and certification.

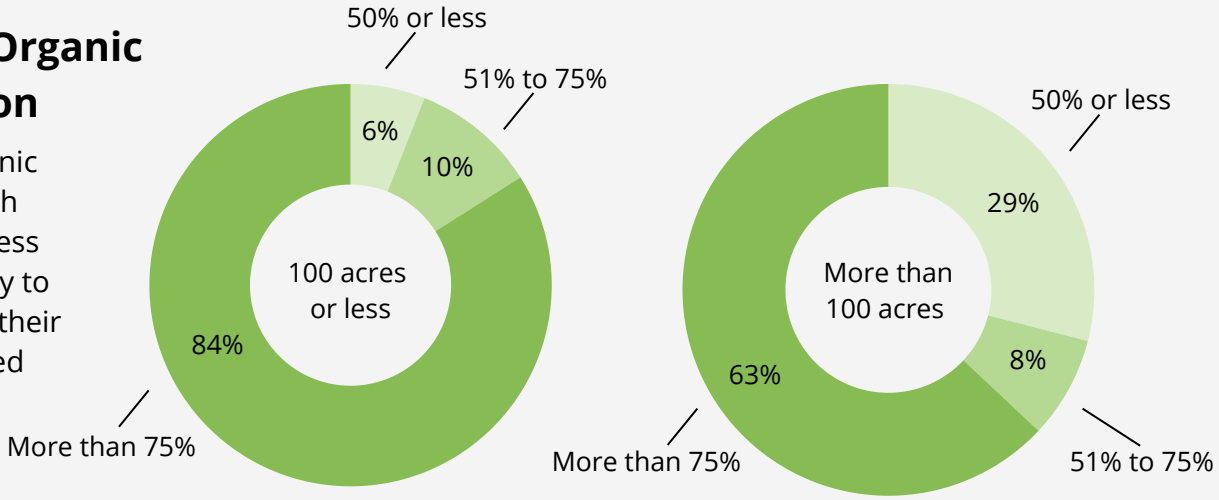
They primarily pursued certification for the the market opportunity/profitability, environmental impact, and their desire to improve the land. They also have a desire to ensure farming is viable for the next generation.

This is largely true regardless of operation size with two exceptions: smaller scale certified organic producers were more likely to have been motivated by the opportunity to improve soil health (68%) and larger scale producers were more likely to have been motivated by the market/premium price (63%).



Acres in Organic Production

Certified organic producers with 100 acres or less are more likely to have most of their land in certified organic production.



Q23. What originally made you decide to pursue organic certification? Select all that apply.
Q25. What portion of your acres in production are you certified organic?

ORGANIC MOTIVATIONS

We asked certified organic producers to share the most rewarding and most challenging aspects of running a certified organic operation, and they said:

Rewards

- Removing toxic chemicals
- Improved operation, built successful business
- Getting a better price for product
- Seeing biodiversity on the farm
- Improved food quality
- Improved soil health
- Building trust with customers
- The challenge/learning
- Being able to operate more independently from big ag
- Reducing the size of operation and making more money
- Crop diversity
- Consumers instantly understand USDA Certified Organic label
- Knowing the kids are safe on the farm

Challenges

- Paperwork, record-keeping, annual inspection
- Weed control
- Keeping up with the rules and regulations to maintain certification
- Inputs - costs, ineffectiveness, process to verify before use
- Lack of technical support
- Increased labor needed
- Contamination from neighboring farms

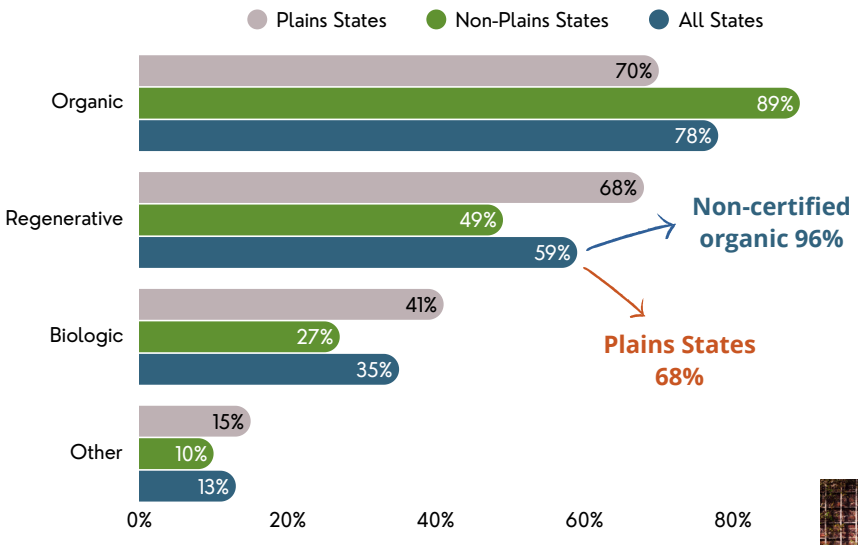
Q27. What has been the most rewarding part of running an organic certified operation?
Q28. What has been the most challenging part of running an organic certified operation?

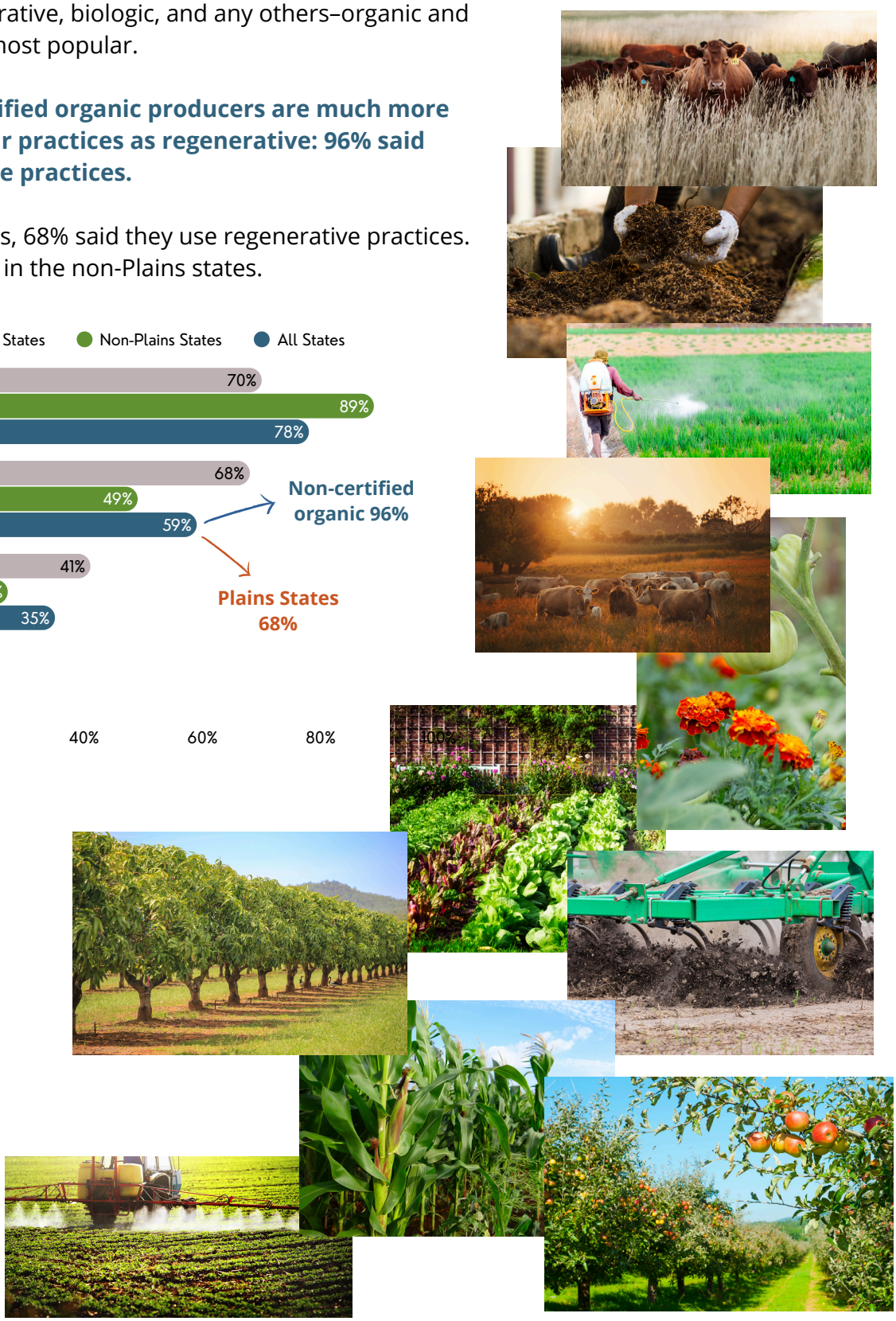
PRACTICES

When asked to self-identify which category of practices they are using–organic, regenerative, biologic, and any others–organic and regenerative are the most popular.

By segment, **non-certified organic producers are much more likely to identify their practices as regenerative: 96% said they use regenerative practices.**

And in the Plains states, 68% said they use regenerative practices. This compares to 49% in the non-Plains states.





Q15. Are you using any of the following practices? Select all that apply.

PRACTICES

We also dove a level deeper and asked all the producers in our survey to tell us about the specific practices they use on their farm or ranch–everything from compost tea to agroforestry to chemical fungicides.

Across all states and all respondents, the top practices are:

78% Cover crops
73% Crop rotation
67% Organic seed (Non-GMO)
61% Manure
60% Compost
52% Tillage
50% Drip or pivot irrigation
48% Green manure
44% Natural mineral amendments
42% Mulching
38% Natural barriers

35% Companion planting
35% Locally adapted seed varieties
34% Integrated pest management
33% Open-pollinated seeds
33% Hybrid seeds
32% Intercropping
32% Diatomaceous earth
31% Compost tea
31% Holistic planned grazing
30% Seed saving practices

While overall practices by region do not vary, there are a few notable differences. Producers in the Plains states are more likely to use crop rotation and holistic planned grazing and less likely to use lime and gypsum.

	Plains States n=78	**Non-Plains States n=61**
Crop Rotation	**82%**	62%
Holistic Planned Grazing	**38%**	21%
Lime	15%	**34%**
Gypsum	9%	**25%**

Notably higher versus comparable segment.

Q47 - Q53. Which of the following, if any, do you use in your operation? Select all that apply.
Showing practices selected by 30% or more of respondents. Full data set in appendix.

PRACTICES

If you were to step foot on these farms, you'd likely notice the certified organic farms and non-organic farms look and feel more similar to each other while the non-certified organic farm stands out. Certified organic and non-organic are heavily focused on cover crops, crop rotation and inputs–organic or synthetic. **Certified organic producers have the highest rate of tillage of any segment.**

Non-certified organic producers, on the other hand, are more diversified in their practices. In addition to cover cropping and crop rotations, these producers are also busy mulching, saving seeds, installing and caring for permaculture and natural barriers, harvesting rainwater and more.

CERTIFIED ORGANIC

- ∧ **80%** Organic seed
- **78%** Crop rotation
- ∧ **75%** Cover crops
- ∧ **72%** Tillage
- ∧ **67%** Manure
- ∧ **62%** Compost
- ∧ **53%** Green manure
- **52%** Drip or pivot irrigation
- ∧ **44%** Natural mineral amends.
- **44%** Natural barriers
- **33%** Mulching
- **33%** Beneficial insects
- ∧ **33%** Diatomaceous earth
- **33%** Precision agriculture

NON-CERTIFIED ORGANIC

- **85%** Cover crops
- ∧ **81%** Heirloom seed varieties
- ∧ **78%** Organic seed
- ∧ **78%** Compost
- ∧ **78%** Mulching
- **70%** Crop rotation
- ∧ **67%** Open-pollinated seeds
- ∧ **59%** Companion planting
- ∧ **56%** Drip or pivot irrigation
- ∧ **52%** Natural mineral amends.
- ∧ **52%** Locally adapted seeds
- ∧ **52%** Seed saving practices
- **48%** Manure
- ∧ **48%** Integrated pest mgmt.
- ∧ **48%** Holistic planned grazing
- **44%** Green manure
- ∧ **44%** Diatomaceous earth
- **44%** Intercropping
- ∧ **44%** Compost tea
- ∧ **44%** Neem oil
- ∧ **44%** Permaculture
- **41%** Beneficial insects
- **41%** Hybrid seeds
- ∧ **33%** Rainwater harvesting
- **30%** Natural barriers
- **30%** Seaweed extracts
- ∧ **30%** Insecticidal soaps

NON-ORGANIC

- **74%** Cover crops
- **57%** Crop rotation
- **57%** Manure
- ∧ **57%** Chemical herbicides
- ∧ **48%** Holistic planned grazing
- ∧ **43%** Synthetic fertilizers
- **35%** Green manure
- **35%** Compost tea
- **30%** Drip or pivot irrigation
- **30%** Natural mineral amends.
- **30%** Locally adapted seeds
- **30%** Intercropping
- **30%** Beneficial insects
- **30%** Hybrid seeds

AVERAGE NUMBER OF PRACTICES SELECTED

13 Certified organic

16 Non-certified organic

11 Non-organic

∧ Notably higher compared to at least one other segment shown here.

Q47 - Q53. Which of the following, if any, do you use in your operation? Select all that apply.
Showing practices selected by 30% or more of the segment. Full data set in appendix.

PRACTICES

Differences exist when we look at organic operations by size too. Larger certified organic operations are much more likely to be tilling the ground with 81% saying they use this practice. And while it's a smaller percentage, 25% and 23% said they use chemical herbicides and synthetic fertilizers, respectively.

Meanwhile, smaller scale certified organic operations are more likely to use irrigation systems and practices that introduce diversity like mulching companion planting, intercropping, and heirloom seeds.

CERTIFIED ORGANIC 100 ACRES OR LESS	CERTIFIED ORGANIC MORE THAN 100 ACRES
77% Cover crops	**85%** Organic seed
71% Crop rotation	**83%** Crop rotation
71% Organic seed	^ **81%** Tillage
^ **68%** Drip or pivot irrigation	^ **75%** Manure
65% Compost	**73%** Cover crops
58% Tillage	**60%** Compost
55% Manure	**58%** Green manure
55% Natural mineral amends.	^ **48%** Precision agriculture
55% Natural barriers	**42%** Drip or pivot irrigation
^ **52%** Mulching	**38%** Natural mineral amends
45% Green manure	**38%** Natural barriers
^ **45%** Companion planting	**38%** Diatomaceous earth
^ **45%** Intercropping	**33%** Lime
42% Beneficial insects	**33%** Hybrid seeds
^ **39%** Heirloom seed varieties	^ **25%** Chemical herbicides
39% Seaweed extracts	^ **23%** Synthetic fertilizers
32% Locally adapted varieties	
32% Open-pollinated seeds	
32% Botanical insecticides	

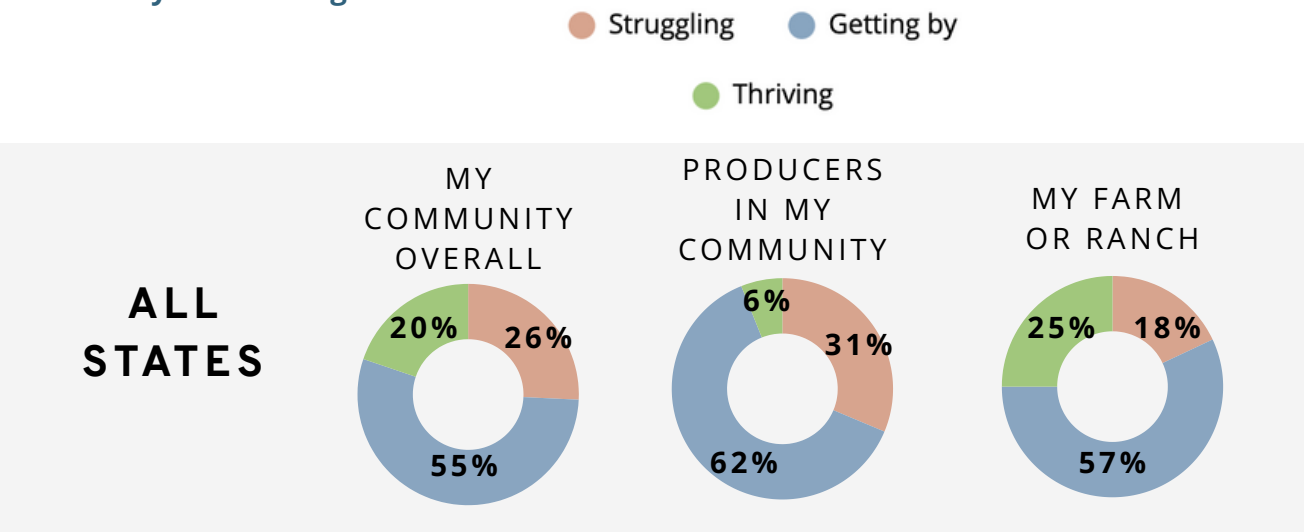
^ Notably higher compared to the other segment shown here.

Q47 - Q53. Which of the following, if any, do you use in your operation? Select all that apply.
Showing practices selected by 30% or more of the segment, with two exceptions for the 'More than 100 Acres' segment. Full data set in appendix.

COMMUNITY SNAPSHOT

In the interviews with producers, they often spoke about the state of their communities. To better understand this, we asked producers in the survey to rate their community, neighboring farmers and ranchers, and their own farm or ranch.

Across all respondents in all states, they see their farm or ranch as doing about as well as the community overall, but better than other farms and ranches in their community. **While 25% say their own operation is thriving, only 6% say other farms and ranches in their community are thriving.**



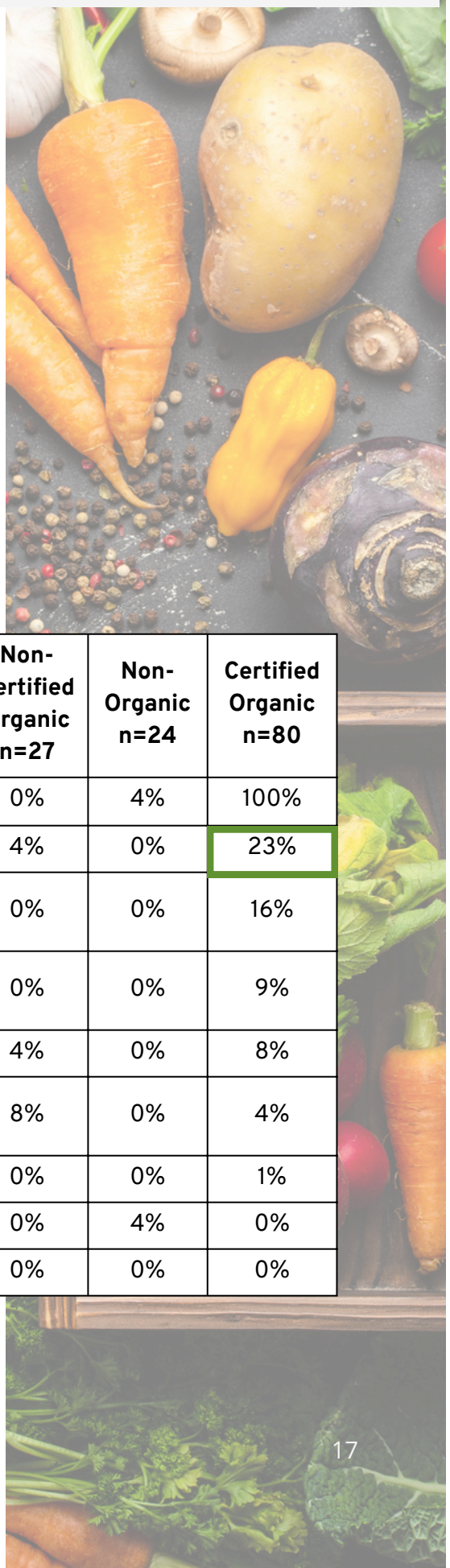
Looking at the data by certification status, **37% of non-certified organic producers say their farm or ranch is thriving versus 21% of certified organic and 22% of non organic producers.** When we combine this with the data we saw earlier on how non-certified organic producers rank profit per acre–significantly lower in operational goals (7%, compared to certified organic at 42% and non-organic at 50%)–we might conclude that non-certified organic producers consider "thriving" outside of economic terms more than other groups.

Certified organic farmers see their farm doing just about as well as the community overall until we dive a bit deeper. 29% of smaller scale certified organic operations (100 acres or less) say their farm or ranch is struggling. This compares to only 10% of larger scale certified organic producers. When we split this at 250 acres, the difference is even more stark–**30% of certified organic producers with 250 acres or less say their farm or ranch is struggling compared to only 5% of those with over 250 acres.**

The combination of smaller scale organic producers admitting they are struggling, 18% overall saying their farm or ranch is struggling, and 31% who think the farmers and ranchers in their communities are struggling is worrisome. While we are not yet to solutions section of this report, we certainly need to be prepared to consider the ways in which we can better support all producers–and especially smaller scale producers.

Q37. How would you describe your community? Select one.
Q38. How would you describe the farmers and ranchers in your community? Select one.
Q39. How would you describe your farm or ranch? Select one.

CERTIFICATION STATUS & INTEREST



Certification Status

By far the most common certification among all respondents in the survey is USDA Organic Certification (58%). A far second to that is Non-GMO Certification (14%).

Certified Organic producers are most likely to have another certification, with Non-GMO being the most popular (23%).

Respondents from Plains states are less likely to have USDA organic certification compared to thise in non-Plains states.

Non-certified organic and non-organic producers have few certifications period. As you'll see though this doesn't mean they are entirely opposed to certification.

"I already have this certification"	All States n=144	Plains States n=79	Non-Plains States n=63	Non-Certified Organic n=27	Non-Organic n=24	Certified Organic n=80
USDA Organic Certified	58%	47%	71%	0%	4%	100%
Certified Non-GMO	14%	13%	16%	4%	0%	23%
Real Organic Project Certified	9%	8%	10%	0%	0%	16%
Regenerative Organic Certified (ROC)	5%	4%	7%	0%	0%	9%
Certified Humane	5%	4%	7%	4%	0%	8%
Certified Naturally Grown	4%	5%	3%	8%	0%	4%
Certified Biodynamic	1%	0%	2%	0%	0%	1%
Food Alliance Certified	1%	0%	2%	0%	4%	0%
Regenified	1%	1%	0%	0%	0%	0%

Notably higher versus comparable segments.

Q19. How interested are you in pursuing each of the following certifications?
Full data set in appendix.

CERTIFICATION STATUS & INTEREST

Certification Interest

USDA Certified Organic was the most well-known certification among respondents in the survey--every respondent in the survey was familiar with it. It is not, however the certification they are most interested in pursuing. **50% of all respondents say they are very or somewhat interested in Regenerative Organic Certified (ROC), while only 20% overall say they are very or somewhat interested in USDA Organic Certification.**

There's no notable variation by geography, but there is variation by certification status. **Overall, non-organic producers are the least likely to be converted. They are especially disinterested in USDA Organic Certification–71% say they are not at all interested.** For this reason, we recommend focusing on the non-certified organic producers, where 65% say they are somewhat or very interested in USDA Organic Certified.

Very or Somewhat Interested	All States n=144	Plains States n=79	Non-Plains States n=63	Non-Certified Organic n=27	Non-Organic n=24	Certified Organic n=80
Regenerative Organic Certified (ROC)	50%	49%	48%	63%	25%	53%
Real Organic Project Certified	32%	29%	32%	42%	13%	34%
Certified Naturally Grown	35%	35%	32%	62%	25%	28%
Certified Non-GMO	32%	38%	22%	41%	33%	25%
Certified Humane	27%	30%	21%	41%	17%	25%
Certified Biodynamic	26%	27%	22%	41%	4%	27%
Regenified	26%	30%	17%	26%	26%	26%
USDA Organic Certified	20%	24%	14%	65%	13%	N/A
Food Alliance Certified	20%	23%	16%	33%	8%	18%

Notably higher versus comparable segments.

Q19. How interested are you in pursuing each of the following certifications?
Full data set in appendix.

CERTIFICATION INCENTIVES

Certification Incentives

Producers who are not certified say they might be encouraged with some combination of assistance and a program that provides more focus on outcomes.

		Non-Certified Organic	Non-Organic
Ease the financial burden	Cover the operational cost to transition to organic	41%	13%
	Connect me to a market willing to purchase my goods and pay a premium once I am certified	33%	22%
	Connect me to a market willing to purchase my goods and pay a premium during the transition	26%	30%
	Pay me a stipend to transition to organic	26%	9%
Focus on outcomes	Incorporate more focus on soil health	26%	26%
	Incorporate more focus on nutrient density	19%	17%
Provide transitional assistance	Walk me through the process to transition to organic	26%	17%
	Connect me to labor to help with the transition	19%	0%
Improve my community	Incorporate more focus on farmer, rancher & community health	0%	17%

Notably higher versus comparable segments.

Not everyone can be convinced. At least under the current mental model they have for organic certification–**22% of non-certified organic producers and 39% of non-organic producers say there is nothing that would encourage them to pursue organic certification.**

Q22. What might encourage you to pursue organic certification? Select all that apply.

MARKETS

Across all producers in all states in our survey, the top markets they report selling to currently are direct-to-consumer, organic distributor, commodity, farmer's market, direct-to-retail, and co-op. **The market more producers would most like to have the opportunity to sell into in the food-as-medicine market, followed closely by grocery stores.**

The data in our study suggests that more producers are looking to access markets that pay a living wage for thier products while also aligning to a mission.

CURRENT MARKETS

46% Direct-to-Consumer

27% Organic Distributor

26% Commodity

22% Farmer's Market

22% Direct-to-Retail

20% Co-op

16% Grocery Stores

15% Food Hub/Regional Aggregator

14% Farmstand

13% CSA/Subscription Box

DESIRED MARKETS

38% Food-as-Medicine

27% Grocery Stores

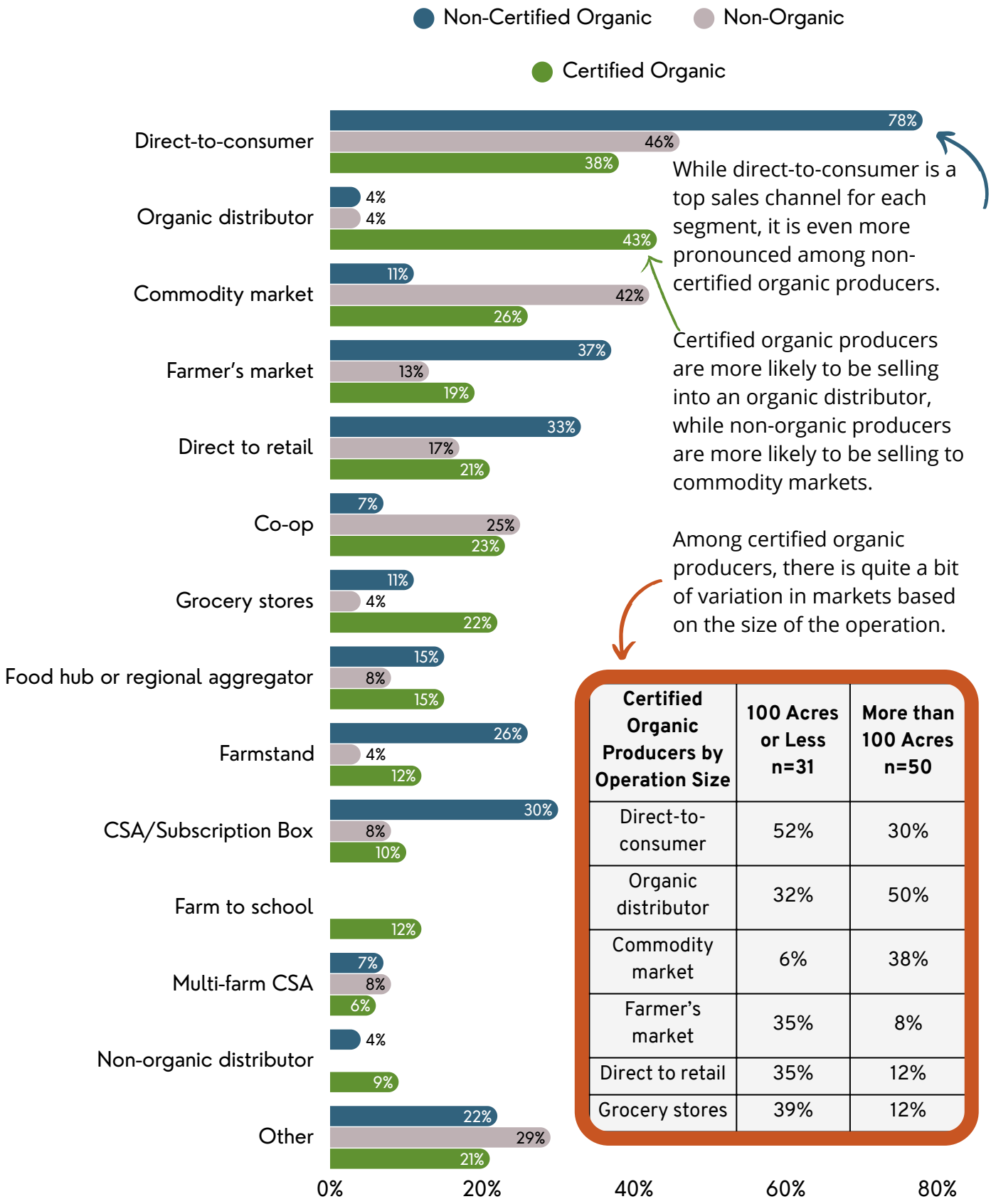
15% Restaurants

11% Farmer's Market

10% CSA/Subscription Box

Q16: What markets do you sell to/use to distribute your product? Select all that apply.
Q18: Imagine you have the opportunity to sell products from your farm or ranch to the following markets in your community. They will purchase whatever you have and you will receive the same premium price at any of these. Which one would you be most interested in selling to and which one would you be least interested in selling to? [Data shown is what respondents said they are most interested in.] Full data set in appendix.

MARKETS



While direct-to-consumer is a top sales channel for each segment, it is even more pronounced among non-certified organic producers.

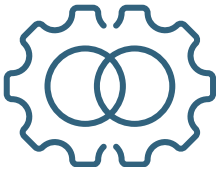
Certified organic producers are more likely to be selling into an organic distributor, while non-organic producers are more likely to be selling to commodity markets.

Among certified organic producers, there is quite a bit of variation in markets based on the size of the operation.

Certified Organic Producers by Operation Size	100 Acres or Less n=31	More than 100 Acres n=50
Direct-to-consumer	52%	30%
Organic distributor	32%	50%
Commodity market	6%	38%
Farmer's market	35%	8%
Direct to retail	35%	12%
Grocery stores	39%	12%

Q16: What markets do you sell to/use to distribute your product? Select all that apply.

BARRIERS TO ORGANIC PRODUCTION



Conventional mindset

Organic certification is built around a conventional system and encourages producers who approach the process with a conventional mindset. From this angle, it's largely a one-to-one substitution–swapping out the inputs they find critical to their current operation with new ones that will allow them to obtain and sustain organic certification.

When producers approach organic with a conventional mindset, they see inputs still needed for the weeds, pests, and plant diseases that are tougher to manage in an organic system. This can be a barrier for those who are certified to continue organic production and for those who might be interested in obtaining certification to see how they can economically benefit from the organic market.

Costs outweigh the benefits

The cost-benefit ratio is out of balance. Some producers don't see the potential increased value as enough of an incentive to outweigh the costs. This includes the financial, regulatory, and administrative burden. Many farmers felt the paperwork and process were too time-consuming and complicated, especially for smaller, diversified operations.

As commonly highlighted in other research, the cost and administrative burden are perceived barriers–and real barriers among those who say they were once certified, but are no longer certified.

Several respondents mention the difficulty of making a profit with the higher costs associated with organic farming, such as increased labor, materials, and input costs, alongside lower yields compared to conventional methods. Despite some success in markets, the financial sustainability of organic farming remains a concern.

Coffee shop talk

Producers talk with each other–this can be both a boost and a barrier to certification, depending on whom they are talking with. By far, producers are most likely to trust a neighboring farmer or rancher for advice. And next to that, they seek advice from their spouse or partner. There are many other sources–extension agents, conservation districts, and more–but none rise to the top when looking across all respondents in all states.

- A neighboring farmer or rancher – 46%
- My spouse/partner – 31%

Open-end feedback from the following question combined with interview analysis.
Q21. What would you say is the top reason why your operation is not currently organic certified? Select one.

BARRIERS TO ORGANIC PRODUCTION

Lack of faith that the premium market is there–or that it requires certification

Some farmers questioned whether the premium for organic products would be worth it, particularly in direct-to-consumer sales, because their customers either didn't demand organic certification or didn't place much value on it. For smaller, direct-to-consumer operations, personal relationships and trust were often seen as more important than certification.

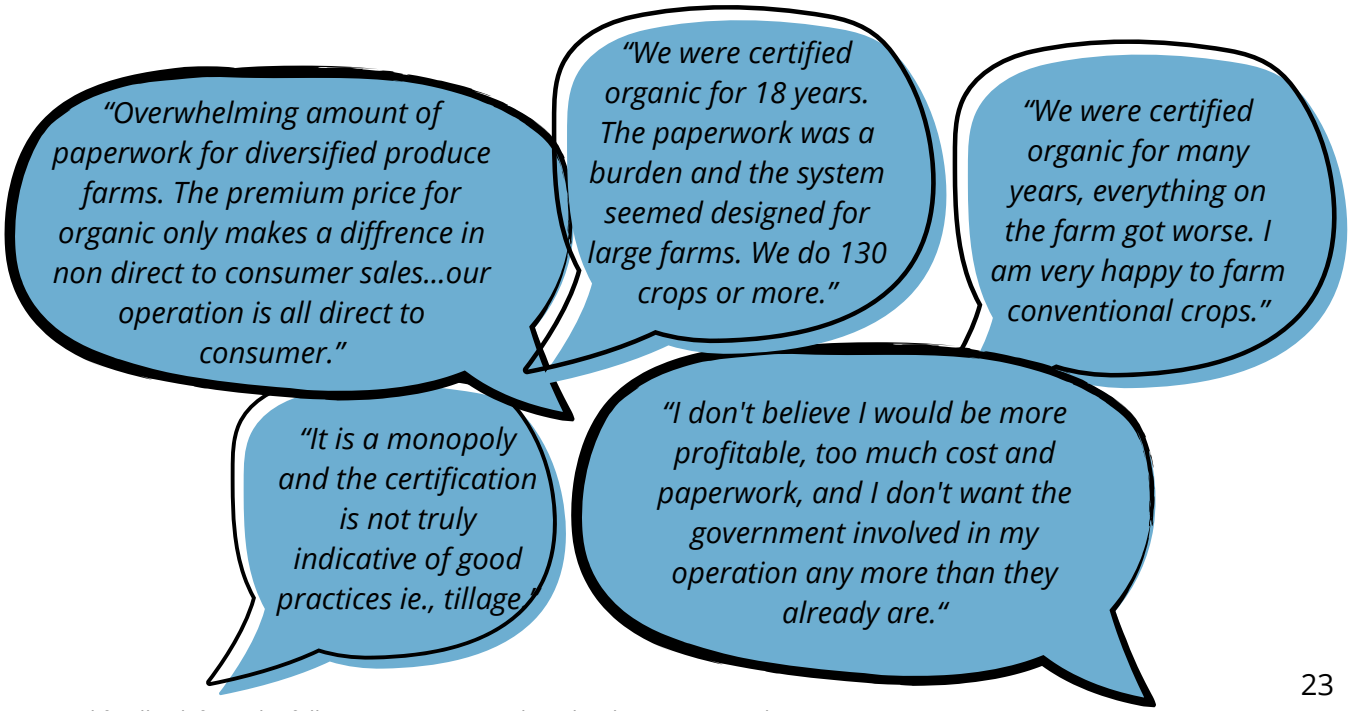
Misalignment with the facts of everyday farming

Producers who are organic certified have experienced the complexity and perceived red tape surrounding organic certification and compliance with rules are frequently mentioned. The time spent navigating certification processes, keeping up with evolving rules, and dealing with certifying agencies that may not fully understand farming practices are significant pain points.

In some cases, farmers also expressed a lack of interest in certification due to a belief that it didn't make a significant difference in their farming practices or product quality.

A vision beyond the market opportunity

While many producers are drawn to organic for the environmental benefits, there is a large segment of producers out there who feel these standards don't go far enough. This is especially true for those who are non-certified organic—many of them are pursuing standards beyond organic, and may even perceive USDA organic standards to be in opposition to the goals they are seeking for their land.



Open-end feedback from the following question combined with interview analysis.
Q21. What would you say is the top reason why your operation is not currently organic certified? Select one.

STRATEGIES TO OVERCOME ORGANIC BARRIERS

STRATEGIES TO OVERCOME ORGANIC BARRIERS

The data here and conversations we have had with producers highlight the need for structural changes in both certification systems and agricultural infrastructure to support the growth of organic production and ensure it maintains its original values and principles.

01 Strengthen & Build Markets

Aggregated Markets. Provide incentives to rebuild local food aggregation markets. The food hubs, local co-ops, mills, and processing infrastructure that was established a hundred years ago has been restructured as farming has moved to a centralized, industrialized system. While this hits smaller-scale growers hardest, it applies at all levels. Provide financial incentives to support the development and expansion of local and regional food aggregation and infrastructure. Encourage these market leaders to support producers with pre-season crop planning, consolidated marketing and sales, and quality-based pricing.

Organic Subsidies. Introduce incentives and subsidies that favor organic crops. The prevalence of subsidies that support industrialized mono-cropping is so strong that there's little market incentive to shift to organic production. This can include provisions in programs supported in the Farm Bill like Supplemental Nutrition Assistance Program (SNAP) and the National School Lunch Program (NSLP) to shift purchasing to organic products at a premium price for producers. Get ahead of emerging markets like prescription food programs by positioning local producers and aggregators to support these markets. Provide incentives for food purchasers like health payers who are interested in locally-grown, nutrient-dense food markets.

Help Producers Profit. Producers need to make a living wage. While we want to be sure these programs are efficient, it should not come at the expense of producers' ability to continue to farm or ranch—or require them to have a second job to support the farm. Encourage quality and a superior product and incentivize markets to put producers at the center and ensure they are profiting.

Organic Buyer Directory. Create a directory of organic buyers and markets by region to connect buyers to the products they need and help producers understand where there is market demand.

Shared Infrastructure. Introduce or strengthen grant programs and incentives for shared infrastructure, such as wash-pack stations, refrigerators, refrigerated trucks, and specialized farm equipment. Encourage communities to share resources instead of requiring individual farms to invest in expensive equipment that ends up having a lot of downtime.

02 Focus Certification on Outcomes

Nature. Environmental outcomes like biodiversity, water quality, and soil health improvement are what initially draw so many producers to organic certification. And yet, the certification doesn't include any measure of environmental improvement. Adding environmental and outcomes-based measures would add credibility to the label for producers.

Soil Health. Many of the non-certified organic producers consider their practices to be "beyond organic." This is due, in part, to the fact that the soil health piece of the organic certification is not well enforced. Strengthening this portion of the certification could lead some producers to support USDA organic certification. Additionally, allowing hydroponics to become certified waters down and discredits the certification among some producers. Consider creating a separate distinction for hydroponically grown products, such as USDA Hydro-Organic Certified.

Human Health. Producers are beginning to understand that the way food is produced can impact their health positively or negatively. It often begins with a diagnosis for themselves or a loved one, or simply questioning why they must wear gloves or a full suit of protection to apply a product—and why they would want to then eat food with a dangerous product on it. They understand that toxic chemicals can negatively impact their personal, family, and community health. At the same time, more and more producers are learning about—and investing in—how their growing practices can impact nutrient-density. They recognize the connection between practices that focus on improving biology, high nutrient-density, and the ways in which food can be medicine. This is an emerging space that the USDA could invest in by providing financial assistance and incentives to organizations that are building the tools to test nutrient-density and then building those outcomes into the certification program, alongside food-as-medicine markets that will drive increased demand for nutrient-dense food.

Community-Based Outcomes. Repeatedly, producers talk about how their communities have changed as a result of the consolidation of farmland and move to industrialization. Rural communities are losing youth to urban and suburban life, small towns have lost the vibrancy that once lived there, and rural and urban communities alike are struggling with access to nutritious food. When we talk to producers—especially small and medium-scale producers of proteins and specialty crops—part of their mission is to keep young people in the community, reinstate health among the people who live there, and provide opportunities in agriculture for the next generation. They envision agriculture as an economic win for the community, although they acknowledge the long road to get there. These communities need financial support to re-open or rebuild the local infrastructure that has been gutted from communities across the nation. This includes things like refrigerators, trucks, mills, grain cleaning, and local food distribution centers.

03 Expand Technical Assistance, Education, and Mentorship

Organic Extension Services. Producers who are seeking information on organic certification are largely left to their own devices—or at least that's how they feel. They have questions and need support before, during, and after certification. Building expertise at the extension level could provide a much-needed local resource to support producers with technical assistance, education, and support for transitioning to organic production. This service could support producers with:

- Pre-application assistance. Provide resources to answer producers' questions before they even begin the application process.Create pre-assessments to help farmers understand requirements and processes. Explain certification requirements in accessible terms.
- Application Assistance. This is especially needed among smaller, more diversified producers. The application process is more time consuming for them because they have a more diversified operation and need to document, say, thirty varieties of seed instead of two.
- Educational events. Organic field days, organic farm tours, and events on specific components such as completing the Organic Systems Plan could help boost awareness and connections among the local community of organic or organic-curious producers.
- Responsive product guidance. Producers are frustrated at the difficulty in understanding when products are/are not allowed and they don't always get the timely response they need to be able to apply the product when it is needed—the weather and growing process do not wait.

Mentorship and Regional Producer Networks. The best and most trusted teachers for producers are other producers. Left on their own, they are relying on certification agencies which are not suited to answer detailed questions or provide guidance. The aforementioned organic extension services could help connect and build a stronger mentor-mentee network. In addition to one-on-one mentorship, develop local groups of organic farmers who can meet regularly to share knowledge, practices, and potentially even equipment. Offer specialized support for small farmers as well as new and underserved farmers.

04 Make Administrative & Program Improvements

Graduated Certification. Provide incentives for producers who are making the commitment to the organic pathway. Consider creating a label to indicate to buyers and consumers that the product has not had synthetic chemicals applied to it, while it is moving toward organic certification.

Paperwork simplification. Farming and ranching systems are complex, so it's not entirely surprising that the process of certification and record-keeping is also complex. However, that shouldn't keep us from trying to do better for producers. We ask so much of them already, it's worth doing a deep-dive into the process to identify opportunities to simplify and ease the burden on producers. This applies to the application process as well as the process of documentation once certified. There is likely a way to find equilibrium between meaningful standards and excessive bureaucracy. Review standard to see where there are areas that are not ultimately serving the desired outcome.

Financial Assistance. Provide financial assistance to help with the administrative burden of the application and transition process. Expand cost-share programs to help ease the burden on producers—especially smaller producers. Make it easier for organic producers, especially smaller organic producers to get coverages for losses. Consider alternatives to certification. How can USDA help producers arrive at the same goal—environmental and health outcomes—without the burdens and barriers that come along with certification?

05 Partner with Regenerative Organic Certification (ROC)

Develop Partnership. Non-certified organic and certified organic producers alike are most interested in Regenerative Organic Certification. This certification builds upon USDA Organic Certification and could be a draw for producers who align with the stricter soil health requirements, humane treatment of animals, and producer well-being. Consider a partnership with the Regenerative Organic Alliance, which oversees the Regenerative Organic Certification (ROC), to help producers prepare to expand their certification. Thinking of ROC as a next-level organic certification could help draw interest among more producers.

Methodology

METHODOLOGY

The insights within this report are a combination of qualitative and quantitative insights gathered by Think Regeneration in 2024 and 2025.

Qualitative
Think Regeneration spoke with a total of 36 farmers, ranchers, and ag industry professionals across individual interviews and working group sessions. They conducted individual interviews between September 2 and October 11, 2024. and working group sessions between March 4 and 7, 2025.

Quantitative
Think Regeneration fielded an online survey between November 7, 2024 to January 18, 2025. 152 farmers and ranchers nationwide, including 86 from the Great Plains states (Colorado, Kansas, Nebraska, Oklahoma, North Dakota, and South Dakota) responded to the survey.

Potential respondents were contacted via partnering organizations including those in the Transitioning to Organic Partnership Program (TOPP) and mining of online databases for producers including the Organic Integrity Database, Organic Consumers Association, and Regenerative Farmers of America. This is not a nationally representative sample.

Note on statistical significance
At a 80% confidence level, the sample sizes in this survey will generally be significant over 15% variance between responses. A 20% variance generally gets to 90% confidence level. For this reason, most of the quantitative differences noted are over 15% variance.

Acknowledgements

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Thank you!

Our programs accelerate change by creating new food markets, sharing peer-to-peer education, fostering healthy communities, and supporting entrepreneurs.

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Appendix

FARMING MOTIVATIONS

Most Describes Me:

	All States n=142	Plains States n=86	Non-Plains States n= 66	Non-Certified Organic n=27	Non-Organic n=24	Certified Organic n=81	Certified Organic	
							< 100 Acres n=31	>100 Acres n=50
I want to make a living for my family	25%	22%	29%	26%	25%	27%	13%	36%
I want to improve the health of the environment through my farming/ranching practices	22%	19%	26%	30%	21%	22%	39%	12%
I want to improve my land and leave it better than I found it	18%	23%	11%	11%	25%	17%	10%	22%
I want to improve my own health and/or the health of my family with the food I grow	14%	17%	11%	19%	21%	10%	6%	12%
I want to carry on the legacy of farming/ranching in my family	12%	12%	12%	0%	8%	15%	13%	16%
I want to improve my community	9%	7%	12%	15%	0%	9%	19%	2%

Q10. Thinking about your farm or ranch and why you do the work you do, please review the following statements.Of these statements, please select which one most describes why you do this work and which one least describes why you do this work.

PRACTICES

	All States n=139	Plains States n=78	Non-Plains States n= 61	Non-Certified Organic n=27	Non-Organic n=23	Certified Organic n=79	Certified Organic	
							100 Acres or Less n=31	More than 100 Acres n=48
Cover crops	78%	83%	72%	85%	74%	75%	77%	73%
Crop rotation	73%	82%	62%	70%	57%	78%	71%	83%
Organic seed (Non-GMO)	67%	63%	72%	78%	22%	80%	71%	85%
Manure	61%	64%	57%	48%	57%	67%	55%	75%
Compost	60%	55%	66%	78%	26%	62%	65%	60%
Tillage	52%	50%	54%	22%	22%	72%	58%	81%
Drip or pivot irrigation	50%	50%	49%	56%	30%	52%	68%	42%
Green manure	48%	54%	41%	44%	35%	53%	45%	58%
Natural mineral amendments	44%	37%	52%	52%	30%	44%	55%	38%
Mulching	42%	38%	46%	78%	22%	33%	52%	21%
Natural barriers	38%	36%	41%	30%	22%	44%	55%	38%
Locally adapted varieties	35%	37%	31%	52%	30%	29%	32%	27%
Beneficial insects (e.g., ladybugs)	35%	37%	33%	41%	30%	33%	42%	27%
Heirloom seed varieties	35%	40%	30%	81%	26%	20%	39%	8%
Companion planting	35%	33%	36%	59%	26%	27%	45%	15%
Integrated pest management (IPM)	34%	35%	33%	48%	17%	29%	29%	29%
Hybrid seeds	33%	41%	23%	41%	30%	28%	19%	33%
Open-pollinated seeds	33%	31%	36%	67%	17%	25%	32%	21%
Intercropping	32%	32%	31%	44%	30%	28%	45%	17%
Diatomaceous earth	32%	37%	26%	44%	26%	33%	26%	38%
Holistic planned grazing	31%	38%	21%	48%	48%	22%	16%	25%
Compost tea	31%	36%	25%	44%	35%	24%	26%	23%
Seed saving practices	30%	31%	28%	52%	22%	24%	23%	25%
Seaweed extracts	28%	23%	34%	30%	22%	29%	39%	23%
Precision agriculture	24%	26%	23%	0%	26%	33%	10%	48%
Lime	24%	15%	34%	15%	13%	29%	23%	33%
Chemical herbicides	22%	26%	18%	0%	57%	16%	3%	25%
Neem oil	22%	22%	21%	44%	17%	15%	19%	13%
Synthetic fertilizers	19%	21%	16%	0%	43%	14%	0%	23%
Botanical insecticides	19%	19%	20%	22%	0%	24%	32%	19%
Permaculture	18%	17%	20%	44%	4%	13%	19%	8%
Bone meal	17%	14%	21%	19%	4%	19%	23%	17%
Blood meal	17%	17%	16%	19%	4%	16%	13%	19%

Q47 - Q53. Which of the following, if any, do you use in your operation? Select all that apply.

PRACTICES (CONT'D)

	All States n=139	Plains States n=78	Non-Plains States n= 61	Non-Certified Organic n=27	Non-Organic n=23	Certified Organic n=79	Certified Organic	
							100 Acres or Less n=31	More than 100 Acres n=48
Gypsum	16%	9%	25%	11%	4%	20%	10%	27%
Rainwater harvesting	15%	13%	18%	33%	9%	10%	16%	6%
Biochar	13%	14%	11%	26%	17%	8%	19%	0%
Chemical pesticides	13%	14%	11%	4%	17%	11%	0%	19%
Chemical fungicides	12%	13%	11%	0%	17%	11%	0%	19%
Insecticidal soaps	12%	13%	10%	30%	4%	8%	13%	4%
Agroforestry	11%	9%	13%	22%	13%	8%	16%	2%
Swales	10%	6%	15%	15%	9%	8%	16%	2%
Contour farming	9%	13%	5%	0%	9%	14%	10%	17%
GMOs	8%	13%	2%	0%	22%	5%	0%	8%
Synthetic water treatments	2%	0%	5%	0%	0%	3%	0%	4%

Q47 - Q53. Which of the following, if any, do you use in your operation? Select all that apply.

COMMUNITY SNAPSHOT

All States n=140	My Community Overall (Q37)	The Farmers and Ranchers in My Community (Q38)	My Farm or Ranch (Q39)
Struggling	26%	31%	18%
Getting by	55%	62%	57%
Thriving	20%	6%	25%

Plains States n=79	My Community Overall (Q37)	The Farmers and Ranchers in My Community (Q38)	My Farm or Ranch (Q39)
Struggling	22%	29%	16%
Getting by	63%	66%	57%
Thriving	15%	5%	27%

Non-Plains States n=61	My Community Overall (Q37)	The Farmers and Ranchers in My Community (Q38)	My Farm or Ranch (Q39)
Struggling	31%	34%	20%
Getting by	44%	57%	57%
Thriving	25%	8%	23%

Q37. How would you describe your community? Select one.
Q38. How would you describe the farmers and ranchers in your community? Select one.
Q39. How would you describe your farm or ranch? Select one.

CERTIFICATION STATUS & INTEREST

Certified Organic Producers n=80	Very + Somewhat Interested	Very Interested	Somewhat Interested	Not at all Interested
Regenerative Organic Certified (ROC)	53%	29%	23%	15%
Real Organic Project Certified	34%	14%	20%	16%
Certified Biodynamic	27%	10%	17%	31%
Certified Non-GMO	25%	10%	14%	36%
Certified Humane	25%	9%	16%	24%
Certified Naturally Grown	28%	8%	20%	34%
Regenified	26%	7%	20%	22%
Food Alliance Certified	18%	3%	16%	28%

Non-Certified Organic Producers n=27	Very + Somewhat Interested*	Very Interested	Somewhat Interested	Not at all Interested
Regenerative Organic Certified (ROC)	63%	41%	22%	26%
Certified Naturally Grown	62%	27%	35%	19%
USDA Organic Certified	65%	22%	41%	33%
Real Organic Project Certified	42%	19%	23%	23%
Certified Biodynamic	41%	19%	22%	30%
Certified Humane	41%	18%	22%	26%
Certified Non-GMO	41%	15%	26%	37%
Food Alliance Certified	33%	15%	19%	26%
Regenified**	26%	15%	11%	22%

Non-Organic Producers n=24	Very + Somewhat Interested	Very Interested	Somewhat Interested	Not at all Interested
Regenified	26%	22%	4%	35%
Certified Non-GMO	33%	17%	17%	46%
Certified Naturally Grown	25%	8%	17%	33%
Regenerative Organic Certified (ROC)	24%	4%	21%	38%
Certified Humane	17%	4%	13%	33%
Food Alliance Certified	8%	4%	4%	33%
USDA Organic Certified	13%	0%	13%	71%
Real Organic Project Certified	13%	0%	13%	46%
Certified Biodynamic	4%	0%	4%	35%

*Some fields do not add up to 100% due to rounding

Q19. How interested are you in pursuing each of the following certifications?

MARKETS

Current Markets	All States n=143	Plains States n=80	Non-Plains States n=63	All States				
				Non-Certified Organic n=27	Non-Organic n=24	Certified Organic n=81	Certified Organic	
							100 Acres or Less n=31	More than 100 Acres n=50
Direct-to-consumer	46%	49%	43%	78%	46%	38%	52%	30%
Organic distributor	27%	28%	25%	4%	4%	43%	32%	50%
Commodity market	26%	35%	14%	11%	42%	26%	6%	38%
Farmer's market	22%	24%	19%	37%	13%	19%	35%	8%
Direct to retail	22%	21%	24%	33%	17%	21%	35%	12%
Co-op	20%	20%	21%	7%	25%	23%	19%	26%
Grocery stores	16%	14%	19%	11%	4%	22%	39%	12%
Food hub or regional aggregator	15%	13%	17%	15%	8%	15%	26%	8%
Farmstand	14%	10%	19%	26%	4%	12%	19%	8%
Community support agriculture (CSA)/box delivery	13%	15%	11%	30%	8%	10%	16%	6%
Farm to school	7%	8%	6%	0%	0%	12%	23%	6%
Multi-farm community supported agriculture (CSA)	6%	9%	3%	7%	8%	6%	10%	4%
Non-organic distributor	6%	6%	6%	4%	0%	9%	6%	10%
Other	22%	21%	24%	22%	29%	21%	23%	20%

Q16: What markets do you sell to/use to distribute your product? Select all that apply.

MARKETS

Desired Markets - Selected 'Most Interested'	All States n=143	Plains States n=80	Non-Plains States n=63	All States				
				Non-Certified Organic n=27	Non-Organic n=24	Certified Organic n=81	Certified Organic	
							100 Acres or Less n=31	More than 100 Acres n=50
Food-as-medicine: Providing food for people in your community who have chronic diseases and measure health outcomes of improved diet	38%	43%	32%	56%	33%	30%	29%	30%
Grocery store: Local grocery sourcing local goods	27%	23%	32%	15%	21%	35%	29%	38%
Restaurants: Local restaurants sourcing local ingredients	15%	13%	17%	15%	13%	16%	16%	16%
Farmer's market: Local market where producers can set up a booth and sell goods	11%	10%	11%	4%	25%	10%	13%	8%
Community-supported agriculture (CSA): Subscription service where members receive a box of goods on a regular basis	10%	11%	8%	11%	8%	10%	13%	8%

Q18: Imagine you have the opportunity to sell products from your farm or ranch to the following markets in your community. They will purchase whatever you have and you will receive the same premium price at any of these. Which one would you be most interested in selling to and which one would you be least interested in selling to?
Data shown here is from the selection 'Most Interested'