



STATE *of* ORGANIC PRODUCE

2021

PRESENTED BY ORGANIC PRODUCE NETWORK



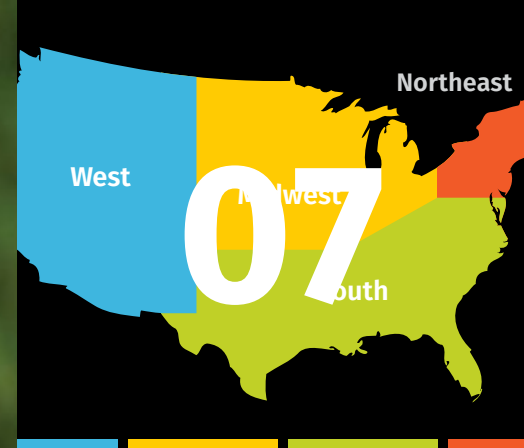
Organics: Our Commitment to the Future

At Divine Flavor, our philosophy of growing organics is deeper than just a certification or a label, **it's a promise to our customers.**

Consumers deserve to eat produce they can trust, free from pesticides or other unnatural applications. Being an organic producer means giving back more to the environment than what is taken away.

Organics is a commitment to the future and our sustainable approach for producing the best flavor in all our commodities.

*This is how we provide
BETTER FOOD FOR A BETTER WORLD.*



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divineflavor.com
BETTER FOOD FOR A BETTER WORLD.



HOMEGROWN
ORGANIC FARMS®

Citrus | Blueberries | Tree Fruit | Grapes

ORGANIC FRUIT IS OUR PASSION

We're family farmers and we've been exclusively growing and marketing certified organic fresh fruit since 1998 and have over 300 combined years of organic fresh fruit experience. Our tailor made product line offers a convenient, one-stop-shop option for all your organic program needs.



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Throughout 2021, the challenges of the global pandemic continued to be a part of our daily life. And while we hope the “new normal” is finally nearing its end, we never want to forget how our industry has been a guiding light for the country and the world during this difficult time. Day in and day out, the fresh produce industry has grown, harvested, and delivered some of the best bounty our planet has to offer—healthy, nutritious organic fruits and vegetables.

If the past two years have taught us anything, it is the resiliency of the people who grow and pack organic produce and the care and courage of those on the frontlines of grocery store operations across the country. Without fail, and without hesitation, our industry has gone above and beyond to fulfill its important role of feeding our nation.

As we look to the future, we would like to thank all those who have participated in making the Organic Produce Network a successful educational and marketing resource dedicated to uplifting and advancing the organic fresh produce industry.

To a bright and prosperous 2022,
Tonya Antle & Matt Seeley

Welcome

BAKO SWEET
CALIFORNIA'S SWEET SPOT

GROWN WITH LOVE

RICH WITH POTASSIUM FOR A HEALTHY HEART

USDA ORGANIC | American Heart Association Certified | ORGANIC IS NON-GMO & MORE

@BakoSweet | BakoSweet | @bakosweet | Country Sweet Produce | Bako Sweet Farm | @BakoSweet

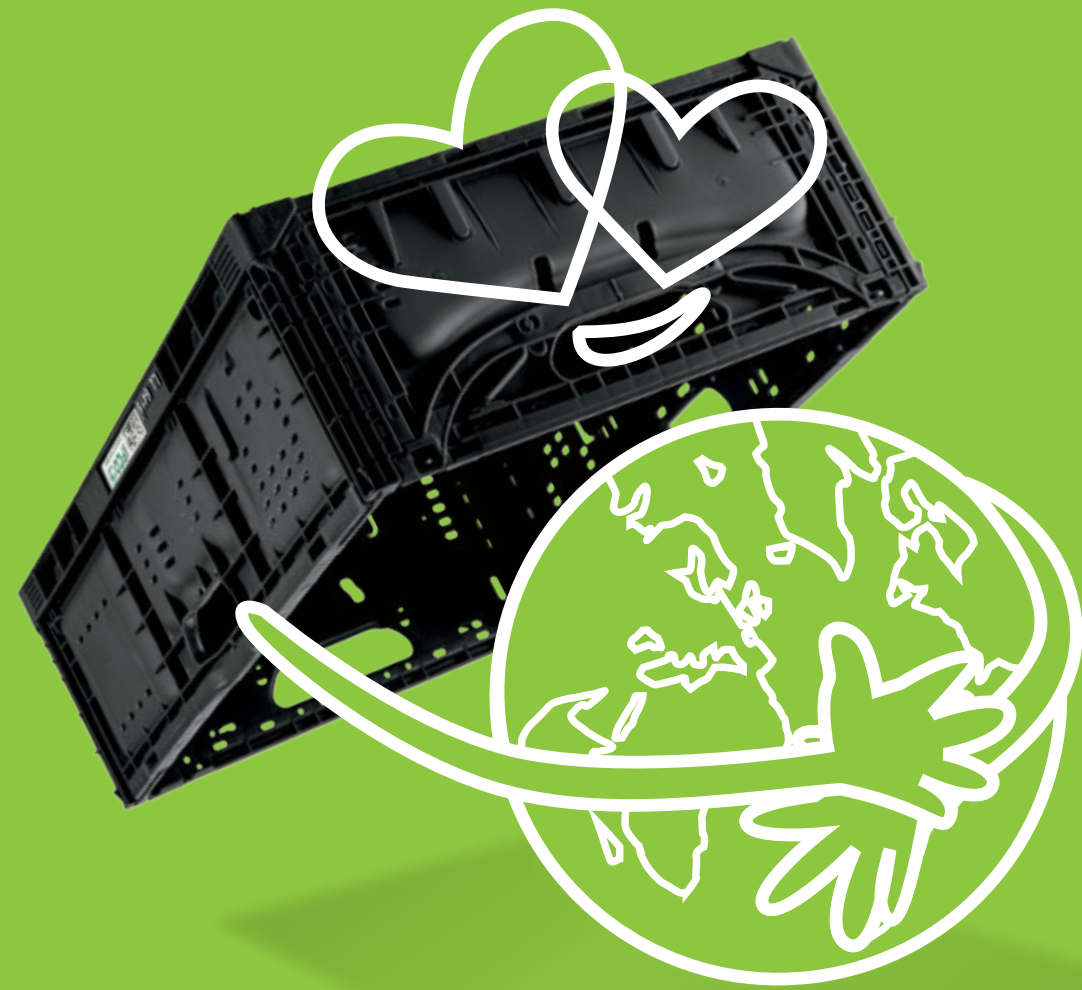
Bako Sweet® is now participating in The American Heart Association's Heart-Check Food Certification Program. Help your shoppers feel good about filling their basket and request samples from sales@countrysweetproduce.com | bakosweet.com



Less plastic for a happier planet.



Sales and Performance Overview



**This crate reduces
your environmental
footprint.**



IFCO crates require less resources –
saving water and energy.
Think inside the box with IFCO!

Organic Produce Sales up 5.5 Percent in 2021, Top \$9 Billion



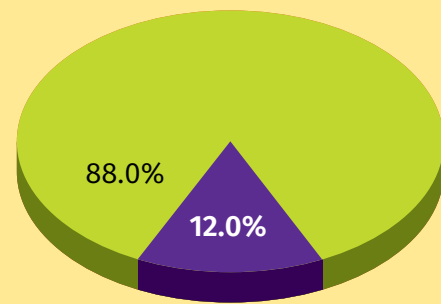
*All data & information
provided exclusively by Category Partners*



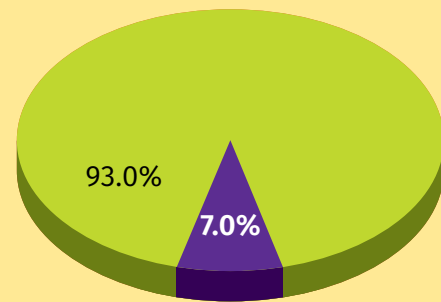
Organic fresh produce sales grew by 5.5 percent in 2021, topping \$9 billion for the first time, and outpaced conventionally grown produce in year-over-year gains in both sales and volume. Despite the return of foodservice, organic produce sales and volume at retail outlets still showed year-over-year growth in all four quarters of last year. Total organic fresh produce sales for 2021 were \$9.2 billion, an increase of \$477 million compared to 2020. Working again with Category Partners, the Organic Produce Network has created an annual report highlighting 20 of the leading category performers in organic produce, which will be described individually later on. This sales and performance overview section looks at organic produce's share of the total fresh produce market, the top 10 organic produce items (by both sales and volume), overall organic produce performance by region, and the year-over-year percentage change in sales for both conventional and organic produce.

Conventional vs. Organic

Topping \$9 billion in sales, organic produce outperformed conventional in terms of both year-over-year sales and volume growth in 2021. While conventional produce posted a sales gain of 1.9% and a volume loss of -3.3%, organic produce saw a 5.5% increase in sales and a 2.1% increase in volume.



● Conventional ● Organic

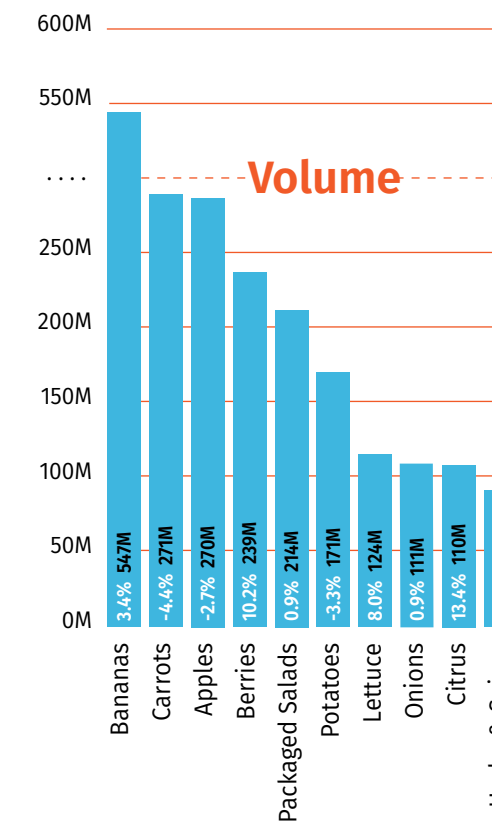
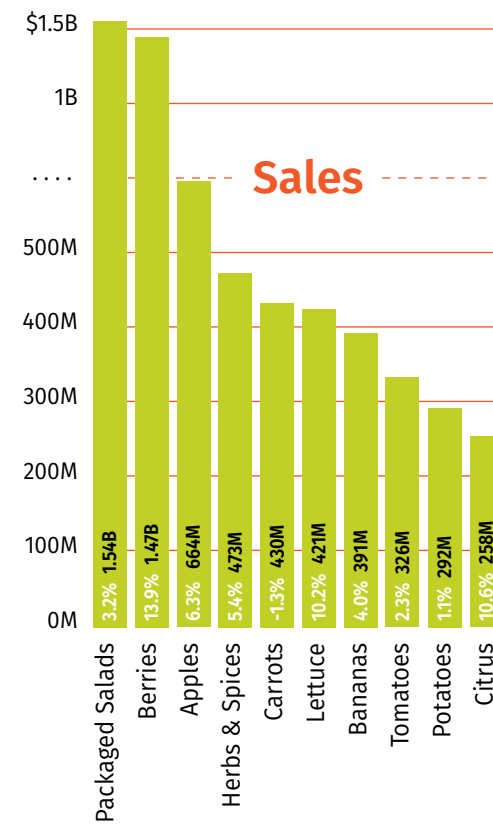


Total Produce Share \$

Total Organic Sales \$9,222,021,505
 Organic Sales Change (YOY) 5.5%
 Organic Sales Share 12.0%

Total Produce Share Volume

Total Organic Volume 3,094,697,666
 Organic Volume Change (YOY) 2.1%
 Organic Volume Share 7.0%



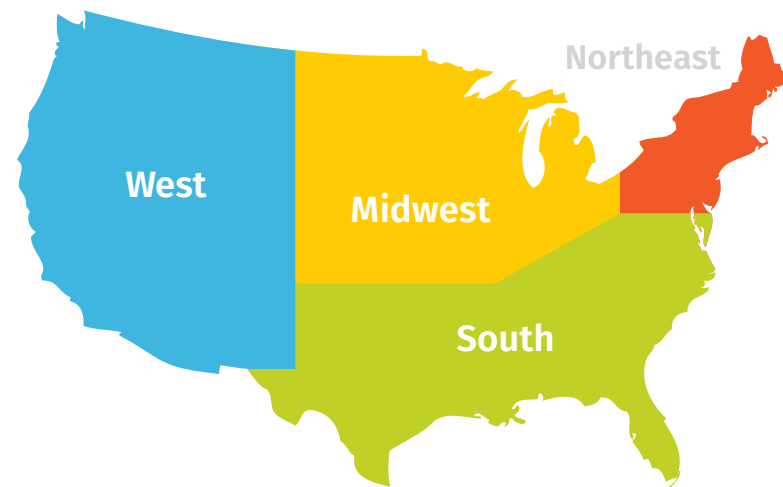
Top 10 Organic Categories

Packaged salads remained the largest driver of organic fresh produce dollars in 2021 with sales topping \$1.5 billion. Berries followed close behind with sales of \$1.47 billion, and apples took third place with sales of over \$660 million. The banana category was the top-volume mover of the organic fresh produce sector, and it posted a year-over-year volume increase of 3.4%.

**Dollar and volume values have been rounded to the nearest million. Volume is measured in pounds.*

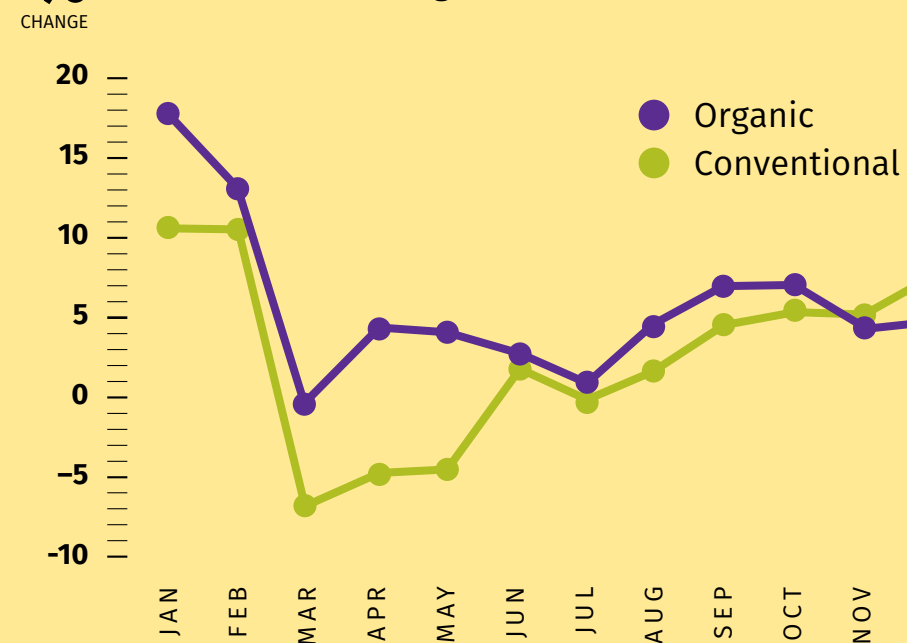
Regional Organic Performance

All four regions showed year-over-year sales gains in 2021. The South was the top performer in both sales and volume growth, with increases of 7.6% and 4.3%, respectively.



	West	Midwest	South	Northeast
Sales	\$2,808,316,150	\$1,415,161,940	\$2,857,617,693	\$2,127,884,248
Sales Change (YOY)	\$97,432,039	\$60,191,255	\$201,819,659	\$118,895,620
Sales % Change (YOY)	3.6%	4.4%	7.6%	5.9%
Volume	944,748,377	492,146,931	1,005,934,347	649,311,276
Volume Change (YOY)	350,323	4,848,234	41,271,846	10,620,911
Volume % Change (YOY)	0.0%	1.0%	4.3%	1.7%

YOY Sales Change

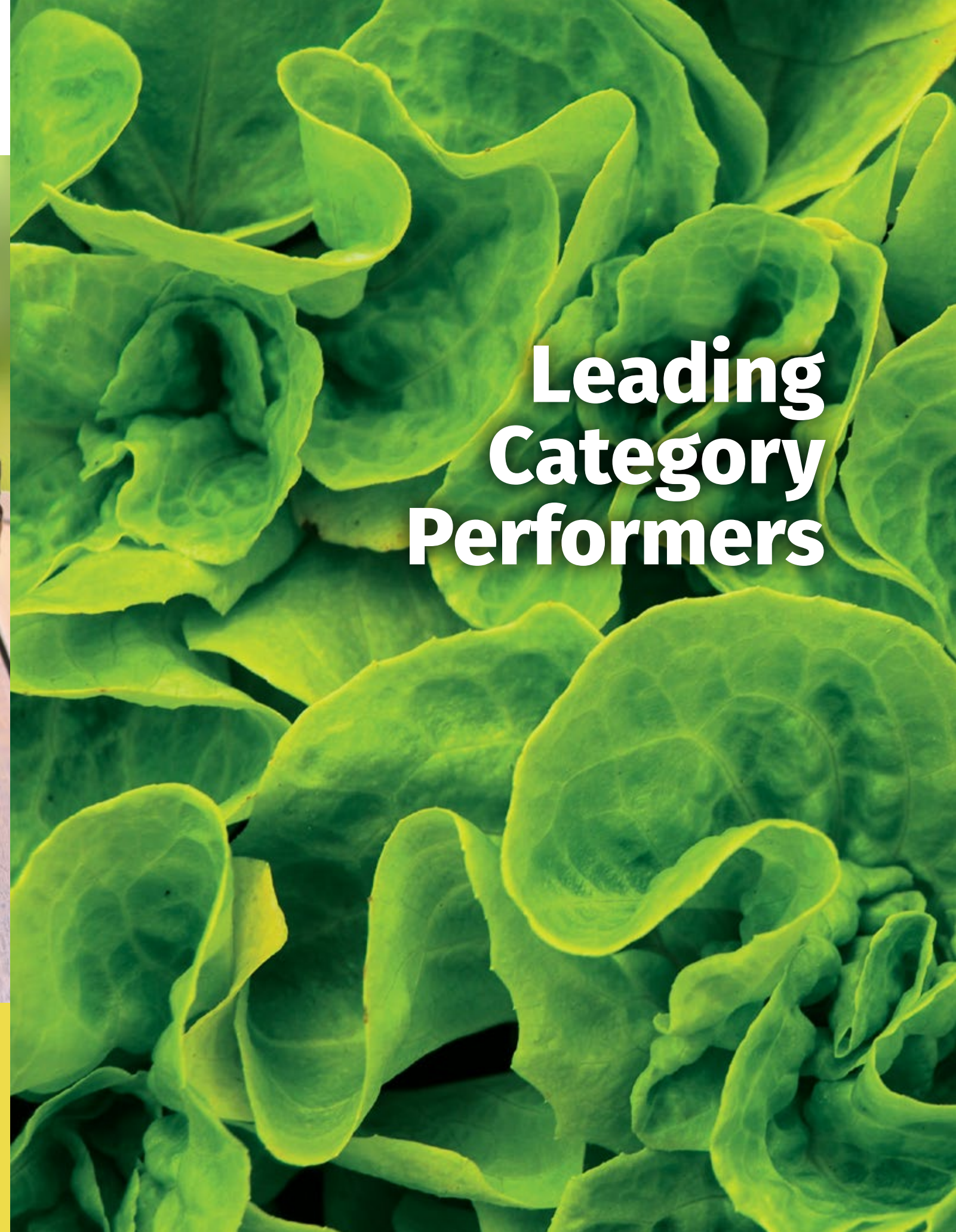


Year-Over-Year Percentage Change in Sales, Conventional vs. Organic

Throughout 2021, organic produce surpassed conventional in terms of year-over-year sales growth, except during the end of the year. Organic produce's strongest rate of sales growth compared to conventional occurred around April.



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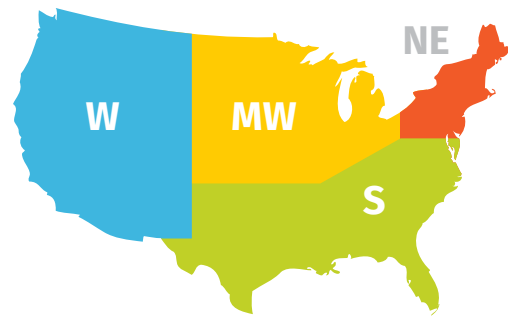
Leading Category Performers

**100%
REDUCTION
OF PLASTIC**

**EASY TO
BREAK DOWN
AND RECYCLE**

**AVAILABLE IN
ALL ORGANIC
VARIETIES**

Packaged Salads | #1 in Sales



Regional Performance

The South was the top-performing region for **organic packaged salads** with total sales of more than \$506 million, while the Midwest saw the greatest year-over-year sales increase (4.5%).

	W	MW	S	NE	SE
Sales	\$423,708,226	\$278,758,615	\$506,584,045	\$335,316,593	
Sales Change (YOY)	\$3,771,242	\$11,906,920	\$20,425,063	\$12,251,550	
Sales % Change (YOY)	0.9%	4.5%	4.2%	3.8%	
Volume	58,873,426	38,273,304	71,082,827	45,428,030	
Volume Change (YOY)	-760,339	1,065,569	993,387	607,582	
Volume % Change (YOY)	-1.3%	2.9%	1.4%	1.4%	



Currently, Organic Salads, the largest portion of the Organic Produce category, is growing at +3% in the L52W. We have seen some surprises in growth, like organic coleslaw, which is growing at +35% in sales \$ in the L52W. With trends like these, we can see that consumers are still preparing meals in their home, but have also added eating out back into their routines.

Jessica Harris

Product Manager, Organics, Taylor Farms



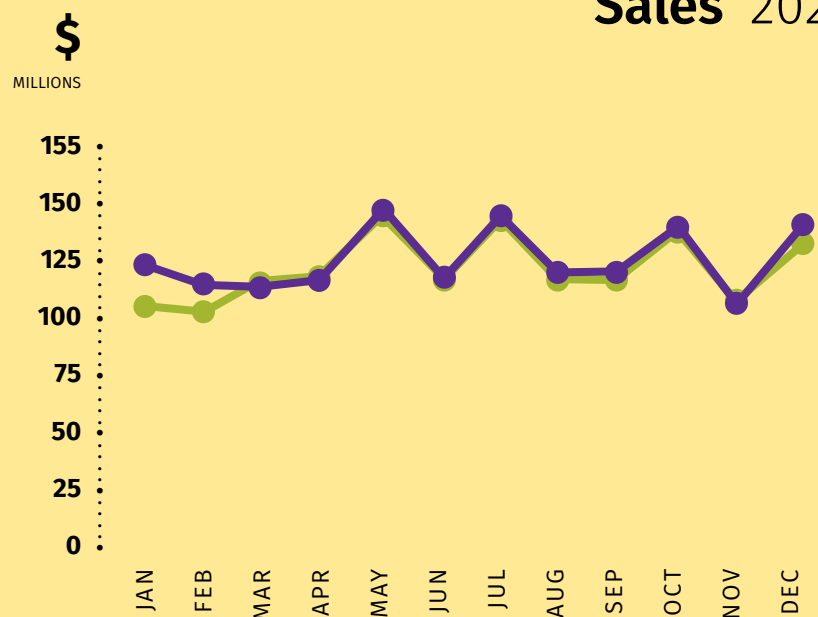
Packaged Salads

Organic sales continue to outpace conventional [in terms of] overall sales growth. I think consumers are paying more attention to what they are putting in their bodies—not to say conventionally grown produce is bad as more consumption of fruits and vegetables is a good thing! The convenience of the salad category as well as more availability on a consistent basis on organically grown produce has certainly helped with the consistent growth.

Dan Canales

SVP of Sales, Marketing and Processing, Ippolito International

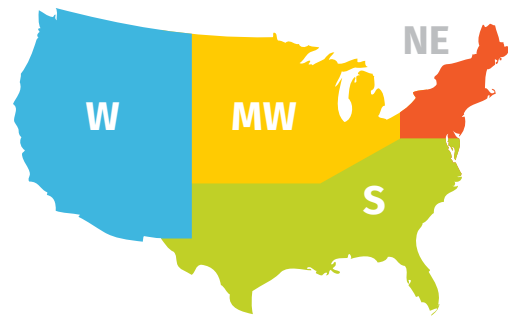
Sales 2021 vs. 2020



The **organic packaged salad** category had its most significant year-over-year sales gains during the first two months of 2021.

● 2021
● 2020

The largest driver of organic fresh produce dollars in 2021, organic packaged salads topped \$1.5 billion in sales and commanded a sizable 73% price premium over their conventional counterparts. Compared to the double-digit year-over-year gains enjoyed by the category in 2020, organic packaged salads slowed considerably in both sales (3.2%) and volume (0.9%) in 2021, likely due to foodservice coming back online as COVID restrictions eased and lockdowns ended.



Regional Performance

With more than \$435 million in sales, the West was the top-performing region for **organic berries**, and it also showed the greatest year-over-year increases in both sales (15.6%) and volume (12.2%).

	West (W)	Midwest (MW)	South (S)	Northeast (NE)	Other
Sales	\$435,614,552	\$219,375,123	\$428,720,864	\$388,889,775	
Sales Change (YOY)	\$58,811,783	\$25,607,066	\$55,548,438	\$40,146,898	
Sales % Change (YOY)	15.6%	13.2%	14.9%	11.5%	
Volume	68,137,317	37,596,648	71,477,851	61,730,866	
Volume Change (YOY)	7,391,746	3,914,982	7,017,798	3,866,715	
Volume % Change (YOY)	12.2%	11.6%	10.9%	6.7%	



You don't need a crystal ball to predict continued growth for organic produce items. Organic strawberries and raspberries are getting stronger demand for organic options, and it's going to be challenging to find that right mix of organic versus conventionally grown produce that is going to be the correct combination for growers to meet the demand of their customers.

Jim Grabowski
 Director of Marketing,
Well•Pict Berries

Honestly, all of the organic berries complement each other and work together to drive sales at retail. That said, organic blueberries and organic strawberries combined make up the biggest percentage of the organic berry category. Organic raspberries and organic blackberries continue to make great gains, though.

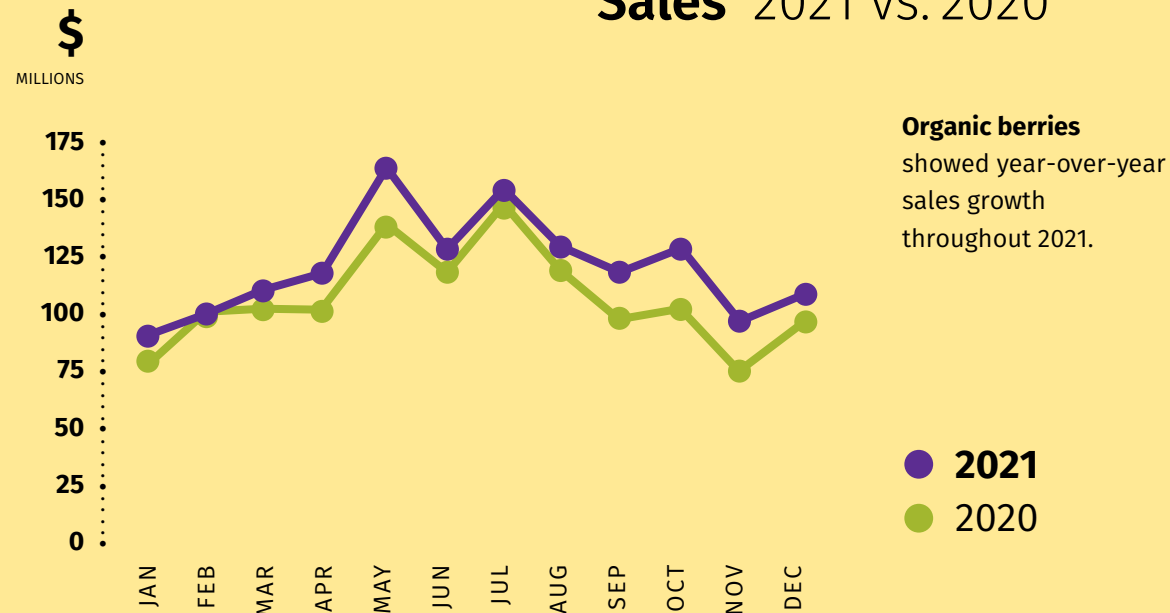
Brian Vertrees
 Director of Business Development,
Naturipe Farms

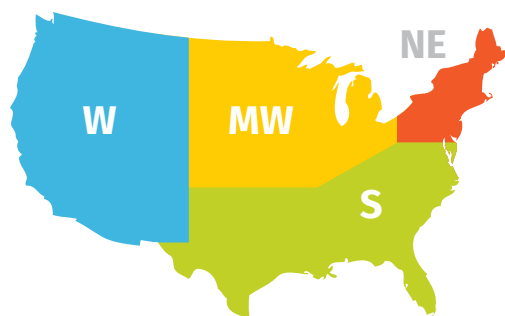


Berries

The #2 organic fresh produce category by annual sales dollars, organic berries raked in close to \$1.5 billion in 2021, increasing by an impressive 13.9% from 2020. With a year-over-year volume gain of 10.2%, organic berries (which include strawberries, blueberries, raspberries, and blackberries) continued to surge in popularity in 2021, and they also commanded a significant price premium of 60% over their conventional counterparts.

Sales 2021 vs. 2020





Regional Performance

The South was the only region that saw a year-over-year increase in **organic apple** volume (0.4%), and it also showed the best year-over-year sales performance (12.4%).

	W	MW	S	NE
Sales	\$179,839,771	\$100,067,785	\$235,065,376	\$147,992,137
Sales Change (YOY)	\$6,635,730	\$5,013,869	\$25,962,462	\$1,728,783
Sales % Change (YOY)	3.8%	5.3%	12.4%	1.2%
Volume	70,632,336	41,559,536	98,367,973	58,903,936
Volume Change (YOY)	-2,492,114	-744,990	392,430	-4,573,069
Volume % Change (YOY)	-3.4%	-1.8%	0.4%	-7.2%



The organic category has grown immensely in the past 10 years. While many commodities are catching up to the demand, and the year-over-year increase in demand has slowed a bit, it by no means has plateaued. Storage of organic apples has always been the biggest challenge. As techniques have improved, we have been able to make the crop last later in the season and expect the same in this upcoming year.

Chuck Sinks

President of Sales and Marketing, Sage Fruit Company

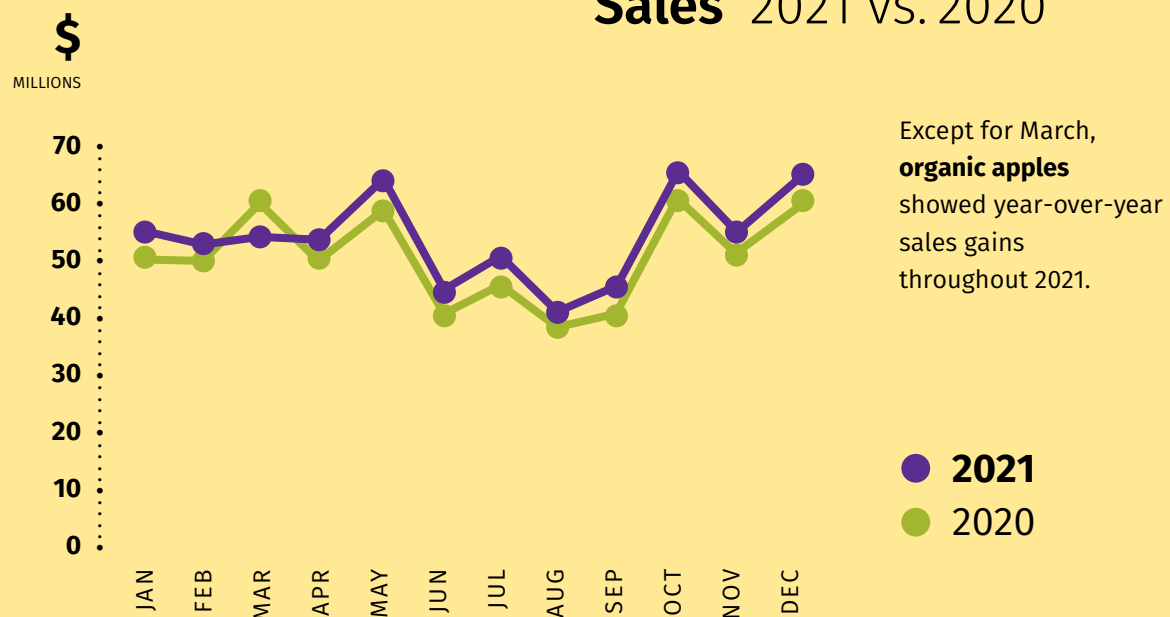
We want to make organics our number one offering every day. We are here for one's organic needs every day of the year. There's not a day that we can't help you fill your shelves with whatever organic product [consumers] are looking for within our core makeup.

Dan Davis

Organic Category Manager, Starr Ranch Growers

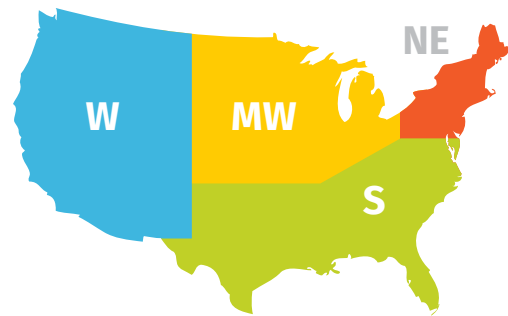
Apples

Sales 2021 vs. 2020



While organic apples didn't have the double-digit year-over-year gains they logged in 2020, the category still managed to post a 6.3% increase in sales in 2021, which was especially impressive given that volume actually decreased year over year (-2.7%). As the third-largest driver of 2021 organic fresh produce dollars, organic apples boasted retail sales of more than \$663 million and a solid price premium of 41% over their conventional counterparts.

Herbs & Spices | #4 in Sales

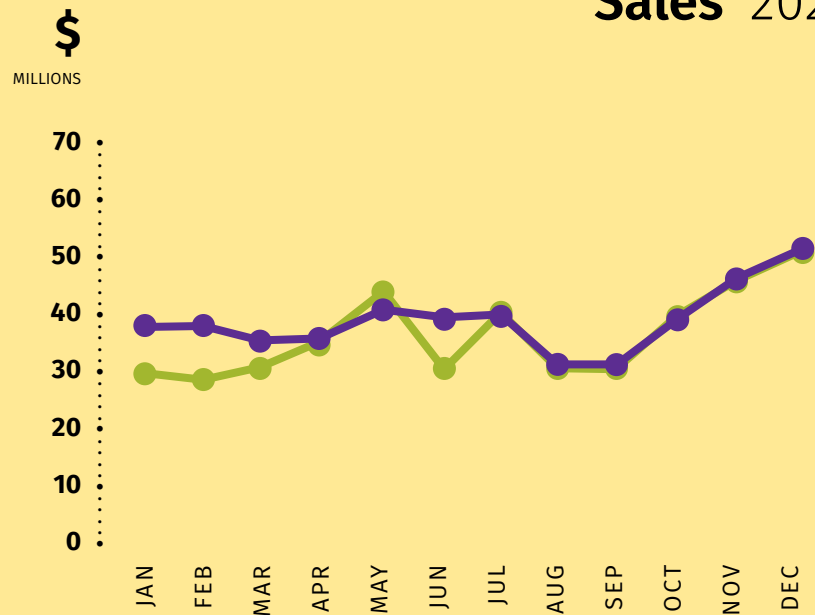


Regional Performance

The Northeast had the most significant year-over-year sales increase (10.1%) of **organic fresh herbs and spices** in 2021, while the South had the highest total sales (\$159 million).

	W	MW	S	NE	SE
Sales	\$138,169,401	\$71,938,436	\$158,563,135	\$104,010,599	
Sales Change (YOY)	\$7,030,225	\$413,536	\$7,271,821	\$9,551,173	
Sales % Change (YOY)	5.4%	0.6%	4.8%	10.1%	
Volume	29,522,521	11,080,215	21,125,819	17,761,721	
Volume Change (YOY)	-383,326	-747,129	-1,747,768	713,317	
Volume % Change (YOY)	-1.3%	-6.3%	-7.6%	4.2%	

Sales 2021 vs. 2020



The **organic fresh herbs and spices** category posted its largest year-over-year sales increases in the first two months of 2021.

● 2021
● 2020



The packaged herb category is roughly 70% organic, which is rather unheard [of] in our industry, and we continue to see that shift up each year. Herbs followed up a record 2020 year with another strong showing in 2021. Driven by the marked shift towards more in-home dining, the category is up over 24% vs. 2019. From an operational standpoint, the year was extremely challenging.

Steve Wright
Chief Customer Officer,
Soli Organic

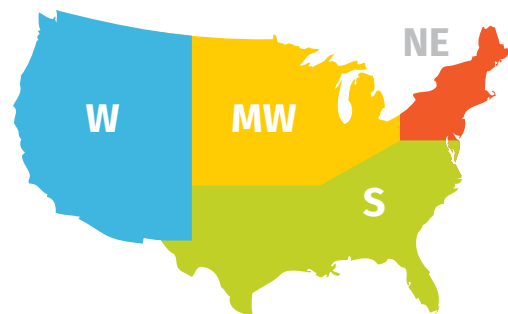
Organic culinary herbs had another great year as consumers continued to drive demand for fresh, quality herbs year-long and during the holidays. We've witnessed impressive growth in the herb category during the past couple years for both retail and home-delivery channels, and we hope 2022 will be no exception.

Dani Loustalot
Marketing Manager,
Jacobs Farm Del Cabo

Herbs & Spices

In 2021, organic fresh herbs and spices took a breather from the breakneck double-digit growth spurt they exhibited in 2020. The category's year-over-year sales increased by a moderate 5.4% in 2021, while volume showed a small decline of -2.7%, suggesting that the surge in home cooking seen during the first year of COVID may have waned slightly as restaurants started reopening in 2021.

Carrots | #5 in Sales



Regional Performance

All four regions saw year-over-year declines in **organic carrot** volume in 2021, and the Midwest was the only region that managed to eke out a year-over-year sales gain (0.3%).

	W	MW	S	NE
Sales	\$121,837,270	\$75,741,144	\$135,353,412	\$95,915,181
Sales Change (YOY)	\$(2,312,501)	\$204,315	\$(1,378,382)	\$(2,175,030)
Sales % Change (YOY)	-1.9%	0.3%	-1.0%	-2.2%
Volume	71,532,847	49,885,629	88,884,871	60,178,714
Volume Change (YOY)	-3,749,255	-1,273,350	-3,807,083	-3,555,513
Volume % Change (YOY)	-5.0%	-2.5%	-4.1%	-5.6%



[During 2020], demand for organic carrots, as well as many other organic products, skyrocketed as retailers purchased all products available to satisfy homebound consumers. Therefore, it was not unexpected that organic carrot sales in 2021 were lower than in 2020 as vaccines returned some normalcy to life. This enabled consumers to dine outside the home where organic produce lacks the presence found in retail stores. ... While there is some concern about how shoppers will adjust their purchase behavior in this high-inflation environment, we remain hopeful that the value organic carrots offer for their contribution to a healthy lifestyle and a sustainable future will continue to generate sales growth in 2022.

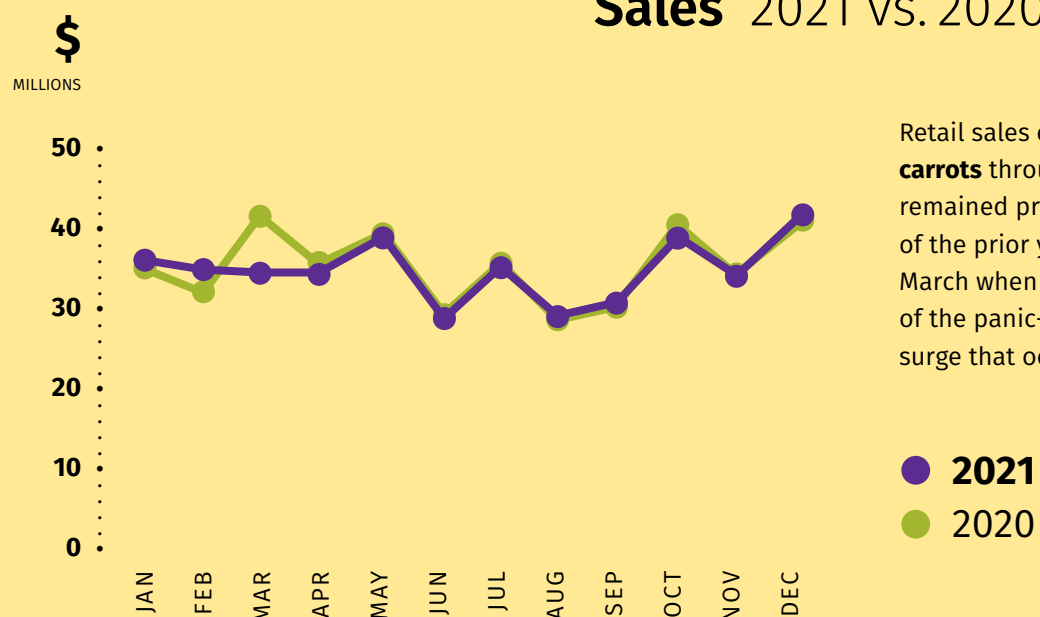


Carrots

David Bright
VP of Marketing,
Grimmway Farms

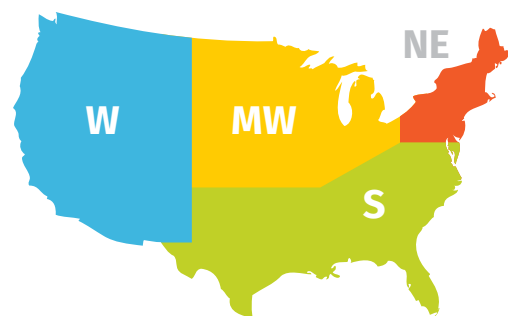


Sales 2021 vs. 2020



Retail sales of **organic carrots** throughout 2021 remained pretty close to those of the prior year, except in March when they fell far short of the panic-buying sales surge that occurred in 2020.

● 2021
● 2020



Regional Performance

The South saw the largest year-over-year increases in both sales (15.5%) and volume (15.4%) of **organic lettuce** in 2021.

	W	MW	S	NE
Sales	\$130,961,015	\$56,047,447	\$131,061,563	\$101,822,550
Sales Change (YOY)	\$8,538,062	\$4,722,732	\$17,617,226	\$7,945,416
Sales % Change (YOY)	7.0%	9.2%	15.5%	8.5%
Volume	36,450,398	19,138,727	47,041,693	21,121,347
Volume Change (YOY)	1,576,213	697,070	6,282,211	593,515
Volume % Change (YOY)	4.5%	3.8%	15.4%	2.9%



Consumers today value organic produce not only for the health of themselves and their family but also that of the environment. The quality and freshness of our produce is paramount, but consumers also want to know that their greens and veggies are grown, processed, and packaged responsibly. Organic farming sequesters carbon, restores soil health, and promotes biodiversity, and these beneficial environmental factors are becoming increasingly important in the purchasing decisions of our consumers.

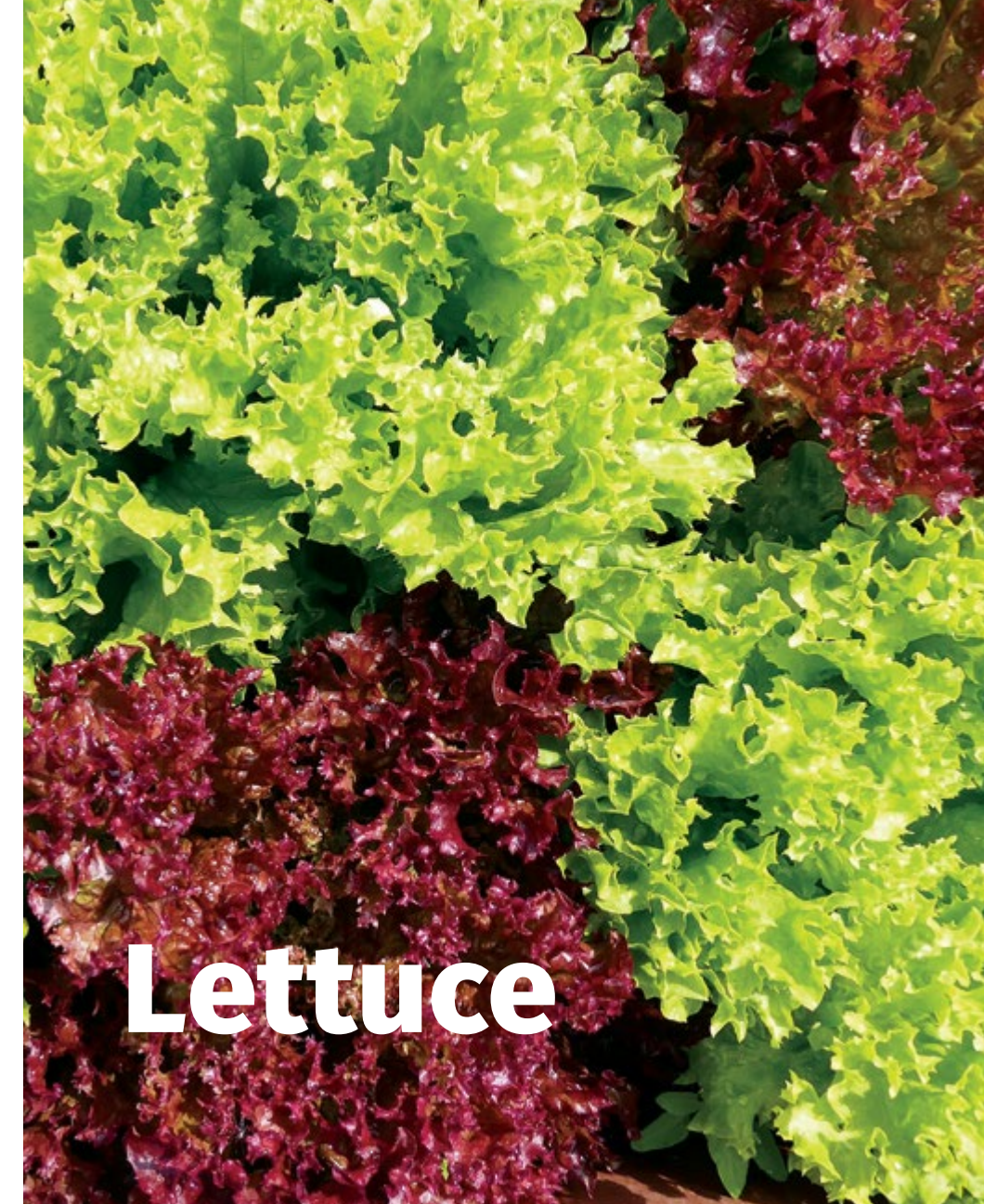
T. Bruce Taylor

VP of Organics & Earthbound Farm Brand, Taylor Farms

I think moving forward, we learned we really need to stay connected with our trading partners so that we understand what their goals are ... so that we can be nimble and flexible and agile and deal with overproduction situations and ... communicate our cost pressures and stable pricing together.

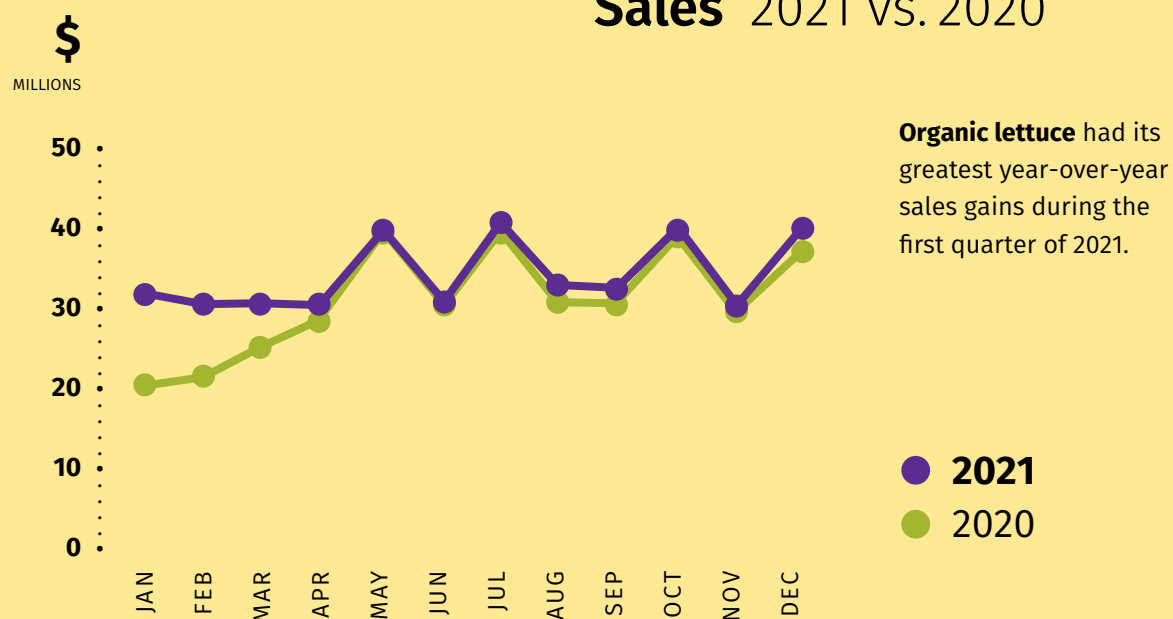
Heather Fuller

VP of Sales, Braga Fresh



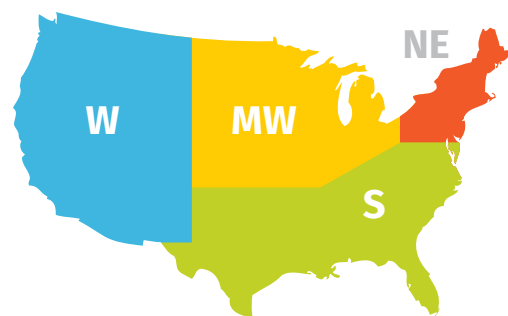
Lettuce

Sales 2021 vs. 2020



In contrast to organic packaged salads, organic lettuce showed very strong year-over-year growth in both sales (10.2%) and volume (8%) in 2021, which could be the result of a consumer shift back to purchasing unpackaged items following the first year of COVID. A top contributor to 2021 organic fresh produce dollars, organic lettuce logged nearly \$421 million in retail sales, and with a price premium of 87%, this salad staple sold at a cost nearly double its conventional counterpart.

Bananas | #7 in Sales



Regional Performance

The Northeast saw the largest year-over-year increases in **organic banana** sales (7.7%) and volume (5.2%), while the South had the most sales overall (\$130 million).

	W	MW	S	NE
Sales	\$121,177,715	\$65,967,965	\$130,224,621	\$72,936,127
Sales Change (YOY)	\$3,448,989	\$3,214,778	\$3,076,922	\$5,195,752
Sales % Change (YOY)	2.9%	5.1%	2.4%	7.7%
Volume	149,300,540	96,509,744	199,538,557	101,847,589
Volume Change (YOY)	739,566	4,024,398	8,503,390	5,002,661
Volume % Change (YOY)	0.5%	4.4%	4.5%	5.2%



We believe that by sharing the 'true cost' of food and educating consumers about what takes place prior to eating a banana, we feel energized about opportunities that exist moving forward.

Mayra Velazquez de Leon
President and CEO,
Organics Unlimited

Our industry has undergone intense cost pressure and has absorbed it to ensure that consumers can continue buying affordable organic bananas. However, the current commodity pricing surge has made this effort unbearable any longer. Packing material prices have risen nearly 20 percent, and plastic bags have gone up 15 percent. Labor costs have also increased nearly double-digit as we have supported our workforce throughout the pandemic. As most experts indicate, there is no end in sight to these cost pressures.

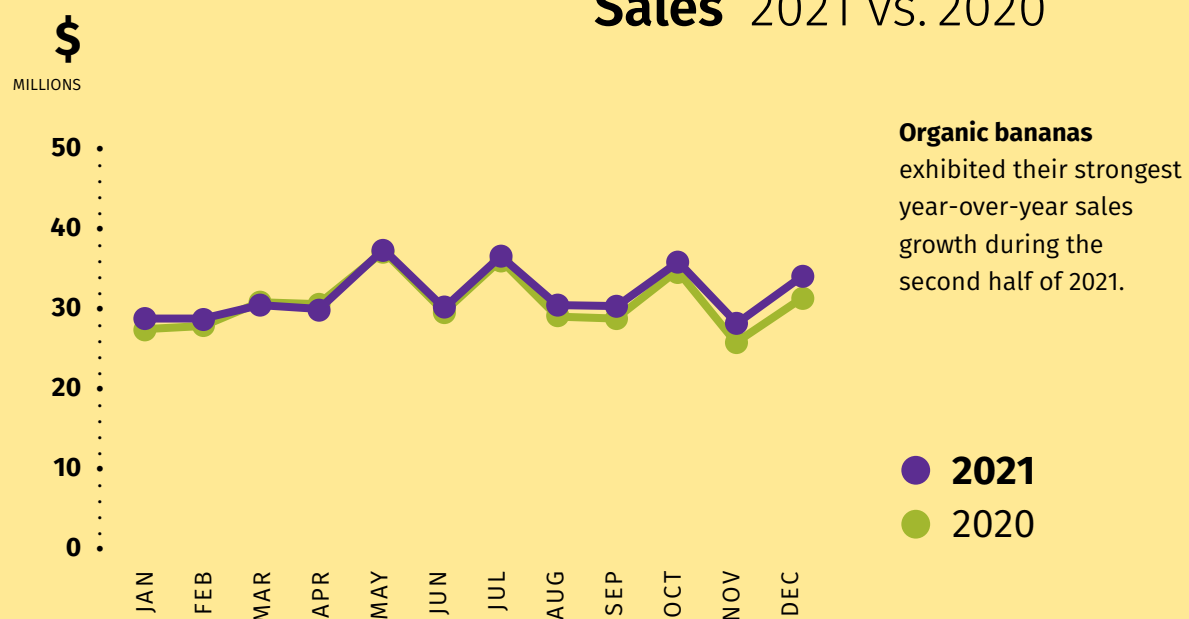
Joint Statement of
Coliman Bananas,
Organics Unlimited, and
Tropical Organic Growers



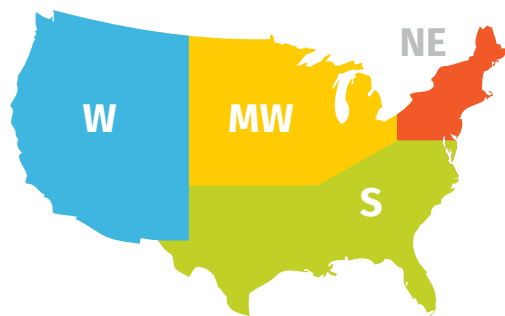
Bananas

With close to 550 million pounds sold in 2021, organic bananas remained the top-volume mover of the organic fresh produce category by a longshot. The consumer favorite posted a 4% year-over-year increase in sales and a 3.4% increase in volume. And despite its frequent loss-leader status, the category still managed to squeeze out a 25% price premium over its conventional counterpart.

Sales 2021 vs. 2020



Tomatoes | #8 in Sales



Regional Performance

The Northeast had the largest year-over-year increases in **organic tomato** sales (6%) and volume (4.1%), while the West had the most sales overall (\$112 million).

	W	MW	S	NE
Sales	\$111,991,816	\$45,984,252	\$92,096,021	\$75,614,270
Sales Change (YOY)	\$541,015	\$1,432,326	\$1,102,283	\$4,260,290
Sales % Change (YOY)	0.5%	3.2%	1.2%	6.0%
Volume	27,560,779	11,420,702	23,251,420	17,820,324
Volume Change (YOY)	802,702	210,063	329,495	702,272
Volume % Change (YOY)	3.0%	1.9%	1.4%	4.1%



33% of Gen Z shoppers want their produce department to carry more organic and greenhouse-grown produce according to FMI. As more consumers become educated on the environmental benefits of sustainable greenhouse growing, we expect more demand for organic greenhouse-grown produce specifically.

Tiffany Sabelli

Director of Sales,
Pure Flavor

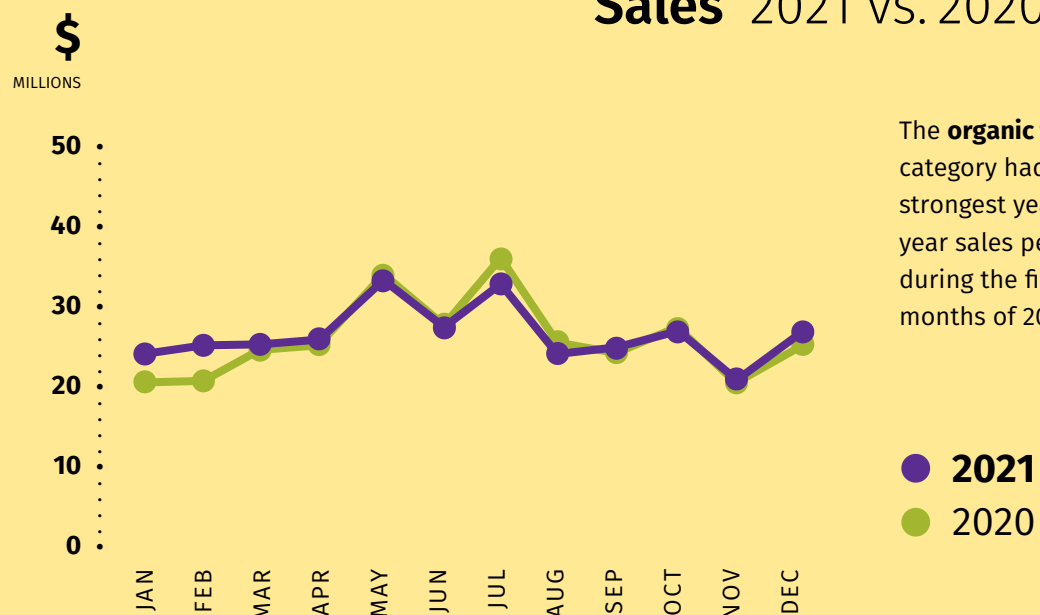
Even as technology improves in greenhouse growing and production, more and more consumers are looking for healthier, environmentally sustainable alternatives. While this is a massive opportunity, it can also become a challenge. The demand for organic produce is becoming greater, and with quality and flavor at the forefront, we must ensure that our focus on delivering the best remains strong, even as demand increases.

Jaclyn Ducharme

Communications Specialist,
Mastronardi Produce

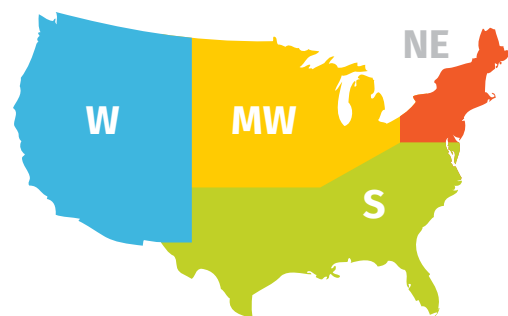
Tomatoes

Sales 2021 vs. 2020



The **organic tomato** category had its strongest year-over-year sales performance during the first two months of 2021.

Potatoes | #9 in Sales



Regional Performance

All four regions saw year-over-year declines in **organic potato** volume, but the West was the only one that also posted a year-over-year sales loss (-2.3%).

	W	MW	S	NE
Sales	\$87,946,087	\$39,070,125	\$98,266,234	\$66,654,159
Sales Change (YOY)	\$(2,034,666)	\$443,243	\$4,479,517	\$310,278
Sales % Change (YOY)	-2.3%	1.1%	4.8%	0.5%
Volume	51,040,304	24,857,042	58,617,136	35,983,682
Volume Change (YOY)	-3,721,150	-1,531,607	-119,377	-406,945
Volume % Change (YOY)	-6.8%	-5.8%	-0.2%	-1.1%



As organic potatoes become more popular with consumers, and as more families begin to favor organic produce, we will see the demand for larger pack sizes escalate. [Also], offering this organic product in a compostable bag attracts buyers who value sustainability. It is everyone's responsibility to take care of the earth where our potatoes grow.

Jessica Hughes
Director of Innovation,
EarthFresh Farms

The Klamath basin has seen normal yields in regard to Yellow and Russet potatoes with Russet sizing skewing quite large. The red crop was significantly down with smaller potatoes and about a 30% decrease in yield. Washington State also experienced lower yield overall but especially in regard to red potatoes, and contrary to the Klamath basin crop, they saw smaller-sized russets.

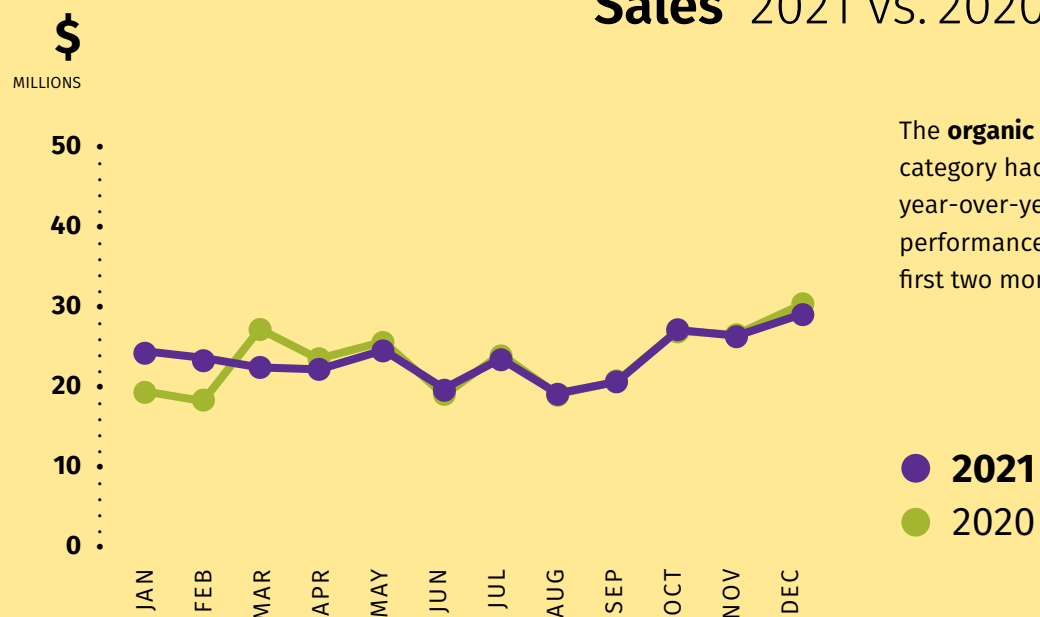
Sydney Fairchild
Marketing and Compliance,
Bridges Produce



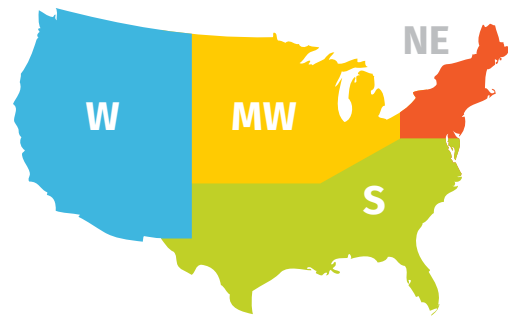
Potatoes

In 2021, organic potatoes lost nearly all of the year-over-year momentum they exhibited in 2020, eking out a 1.1% increase in sales and posting a loss of -3.3% in volume. As the world opened back up last year, COVID-related consumer stockpiling of long-lasting staples like potatoes, carrots, and hard squash significantly declined. On a positive note, organic potatoes commanded a substantial 114% price premium over their conventional counterparts in 2021 and achieved retail sales of more than \$292 million.

Sales 2021 vs. 2020



The **organic potato** category had its best year-over-year sales performance during the first two months of 2021.



Regional Performance

At \$85 million, the South had the highest **organic citrus** sales in 2021, and it also had the greatest year-over-year gains in both sales (19.9%) and volume (22%).

	W	MW	NE	S
Sales	\$76,087,411	\$36,847,309	\$84,776,054	\$59,599,700
Sales Change (YOY)	\$2,043,108	\$4,631,200	\$14,098,055	\$3,941,406
Sales % Change (YOY)	2.8%	14.4%	19.9%	7.1%
Volume	34,008,032	17,248,261	36,470,419	22,663,728
Volume Change (YOY)	1,648,651	2,071,701	6,579,898	2,779,754
Volume % Change (YOY)	5.1%	13.7%	22.0%	14.0%



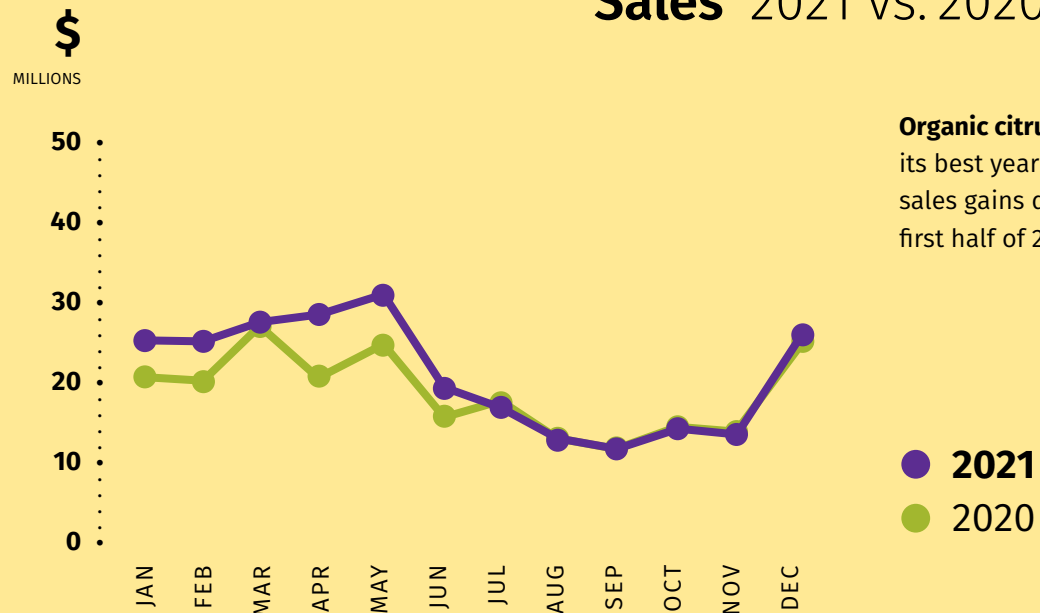
Our main crop is organic citrus, and we see continued growth in the organic market, especially for mandarins and specialty citrus items. Organic customers and consumers in particular are asking for mandarins by variety rather than as a generic mandarin. They seem to have a deeper curiosity about where their food comes from and the varietal details and characteristics. We love curious customers and consumers because we love to nerd out on fruit!

Bianca Kaprielian

CEO and Co-owner,
Fruit World Co.

Citrus

Sales 2021 vs. 2020



Organic citrus logged its best year-over-year sales gains during the first half of 2021.

According to IRI data, total US Organic Citrus dollar sales are up by double digits: + 13% in the last 52 weeks versus one year ago and + 33% versus two years ago (through week ending 12/19/21). This category continues to be a fast-growing segment in agriculture with no signs of slowing down.

Christina Ward

Senior Director, Global Marketing,
Sunkist Growers

Organic citrus continued to perform strongly in 2021, with double-digit year-over-year increases in both sales (10.6%) and volume (13.4%). Well-known for their immune-boosting properties, these vitamin C-rich fruits commanded an average price premium of 49% over their conventional counterparts and brought in a total of \$258 million in 2021 retail sales dollars.



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Grapes

#11 in Sales

Organic grapes roared back in 2021 in terms of year-over-year sales performance, posting a double-digit gain of 13.9% and total sales of more than \$248 million. (In 2020, organic grapes had suffered year-over-year decreases in both sales and volume.) This popular organic snacking fruit also showed a moderate year-over-year volume gain of 3.5% in 2021 and maintained a healthy price premium of 52% over conventional.

“Our goal is to complement the supply of organic grapes from California by bringing our [imported] organic grapes in just as California organic grapes are finishing in the market ... allowing our customers to continue to have grapes available for many months after California grapes have finished in the market.”

David Posner
Founder, President, and CEO,
Awe Sum Organics

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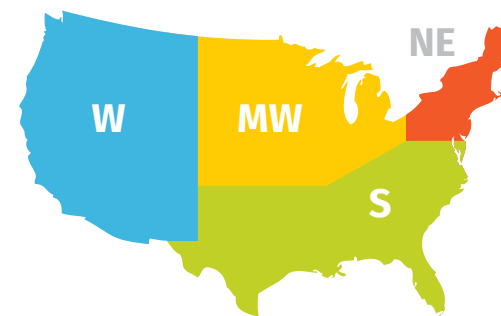
Fruit treated with Nexy forms a natural shield of protection against harmful pathogens in storage. For use in storage rooms and line application.

Features & Benefits

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- Increased pack out
- Decrease repacking
- No MRLs
- WSDA, NOP and OMRI-listed
- Environmentally safe application



www.deccous.com/nexy



Regional Performance

The South had the strongest year-over-year performance in **organic grape** sales (20.5%) and volume (14.1%), while the Northeast had the weakest (7.8% and -2.9%, respectively).

	W	MW	NE	S	Central
Sales	\$71,373,786	\$35,627,475	\$85,964,650	\$55,147,632	
Sales Change (YOY)	\$7,342,311	\$4,309,722	\$14,635,823	\$3,994,421	
Sales % Change (YOY)	11.5%	13.8%	20.5%	7.8%	
Volume	22,810,232	11,347,417	27,188,175	15,817,274	
Volume Change (YOY)	-538,242	225,929	3,358,587	-465,520	
Volume % Change (YOY)	-2.3%	2.0%	14.1%	-2.9%	



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Avocados

#12 in Sales

Organic avocados saw much more modest year-over-year gains in both sales (2.4%) and volume (1%) in 2021 compared to the double-digit increases the category enjoyed in 2020. Still, with over \$232 million in sales, this popular organic fruit remained a powerhouse item in 2021, averaging a respectable price premium of 40% over conventional.

“Even though organic avocados sometimes have a higher FOB cost, they continue to be incredibly promotable. Retailers are not shying away because of prices. Consumers see value in organic avocados. So we see great success on the retail level promoting them.”

Gahl Crane
Sales Director,
Eco Farms

Mushrooms

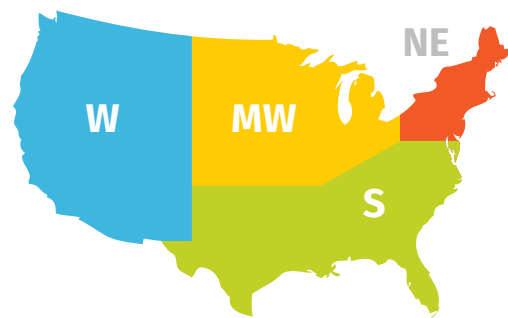
#13 in Sales

Organic mushrooms suffered year-over-year decreases in both sales and volume in 2021, though the sales decline (-1.5%) was much narrower than the volume loss (-8%). Despite its negative year-over-year performance, the organic mushroom category was still a significant driver of organic produce dollars, with total sales topping \$229 million and a substantial price premium of 60% (compared to conventional).

“Over the past two years, we have seen exponential growth in organic mushroom sales. I do not think it was because of the pandemic. We saw sales trending up before the pandemic. The trend started the year before.”

Kevin Donovan
National Sales Manager,
Phillips Mushroom Farms

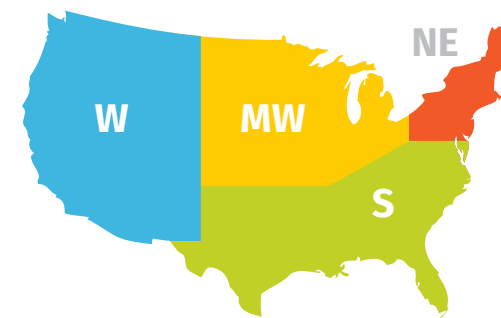
Regional Performance



The Northeast had the best year-over-year **organic avocado** performance with a sales increase of 6.7% and a volume gain of 8.9%, while the Midwest had the worst with a sales loss of -1.7% and a volume decline of -7.6%.

	W	MW	S	NE	SE
Sales	\$88,009,857	\$29,572,761	\$64,780,708	\$49,512,450	
Sales Change (YOY)	\$816,112	\$(511,589)	\$2,180,811	\$3,123,419	
Sales % Change (YOY)	0.9%	-1.7%	3.5%	6.7%	
Volume	25,331,361	8,591,214	18,064,133	16,529,867	
Volume Change (YOY)	232,349	-704,001	-205,204	1,357,038	
Volume % Change (YOY)	0.9%	-7.6%	-1.1%	8.9%	

Regional Performance



Organic mushrooms showed year-over-year declines in both sales and volume in all regions, except the Northeast where it enjoyed a 7.7% increase in sales.

	W	MW	S	NE	SE
Sales	\$76,553,443	\$62,618,496	\$52,297,404	\$37,798,911	
Sales Change (YOY)	\$(1,215,950)	\$(4,386,767)	\$(511,165)	\$2,695,934	
Sales % Change (YOY)	-1.6%	-6.5%	-1.0%	7.7%	
Volume	10,855,904	10,987,482	7,157,040	4,280,135	
Volume Change (YOY)	-697,783	-1,305,148	-773,399	-125,888	
Volume % Change (YOY)	-6.0%	-10.6%	-9.8%	-2.9%	



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Onions

#14 in Sales

With over \$214 million in retail sales in 2021, organic onions achieved year-over-year increases in both sales (4.5%) and volume (0.9%), an impressive feat considering the massive stockpiling of pantry items that occurred in 2020. The category also showed a very strong price premium of 78% over conventional, suggesting that consumers saw significant value in the organic version of this produce staple last year.

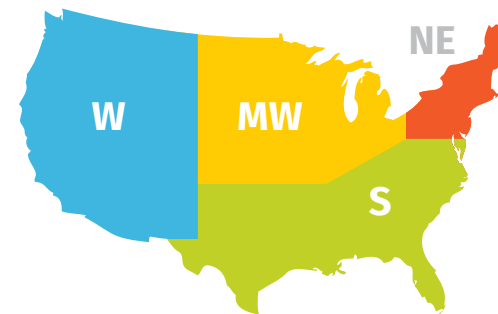
“The recalls seen in 2021 put a spotlight on the onion market and the importance of food safety in this category. The challenging weather caused shortages in the domestic market; therefore storage quantities are way down and will create very high demand in the Spring for Mexican onions.”

Sydney Fairchild

*Marketing and Compliance,
Bridges Produce*



*Diverse Product Lines
Year-Round Programs*



Regional Performance

Organic onions had the highest sales in the South (\$69 million), and that same region also showed the best year-over-year increases in both sales (8.2%) and volume (6.7%).

	W	MW	NE	S
Sales	\$63,791,149	\$30,527,436	\$68,687,381	\$51,003,061
Sales Change (YOY)	\$(120,318)	\$1,875,960	\$5,189,584	\$2,291,860
Sales % Change (YOY)	-0.2%	6.5%	8.2%	4.7%
Volume	33,574,297	16,696,155	39,956,371	20,852,183
Volume Change (YOY)	-905,298	376,432	2,514,741	-953,628
Volume % Change (YOY)	-2.6%	2.3%	6.7%	-4.4%

Bell Peppers

#15 in Sales

A popular choice for cooking, snacking, and salads, organic bell peppers posted small year-over-year gains in both sales (2.3%) and volume (3.1%) in 2021. The category totaled \$186 million in retail sales and commanded a price premium of 87% over conventional, showing that consumers were willing to pay top dollar for this versatile and nutrient-rich organic vegetable.

“Production costs are rising every year, and sometimes it’s not easy to pass those costs on to your customers, but we’ve been able to put together some very fair and equitable contracts with many of our customers, which really helps us keep our dedicated organic farmers in business.”

Rob Gurney
Sales Manager,
Veg-Land

Broccoli

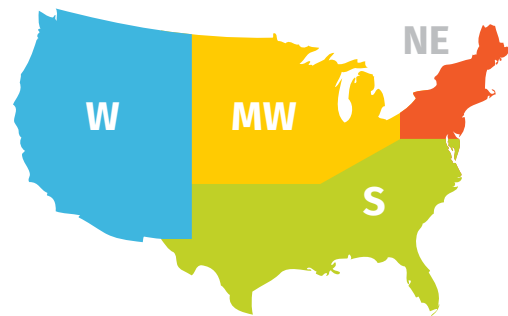
#16 in Sales

A star year-over-year performer in 2021, organic broccoli posted gains of 10.9% in sales and 8.8% in volume, suggesting this highly nutritious organic vegetable was top of mind for consumers. With over \$185 million in sales and a price premium of 53% compared to conventional, organic broccoli was a solid driver of 2021 organic fresh produce dollars.

“We value the Broccoli category for the rotational value it has for both our farming schedule and soil health. While yield pack and processing had steady volume for us in 2021, we saw strong YOY growth in 2021 with Josie’s Organics bunched Sweet Baby Broccoli.”

Kori Tuggle
VP Marketing,
Braga Fresh

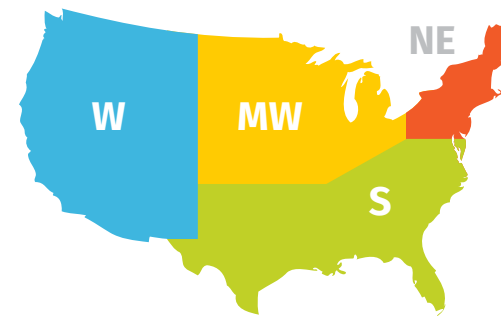
Regional Performance



Organic bell peppers had their best year-over-year performance in the Northeast where they posted a 7% increase in sales and a 15.5% gain in volume.

	W	MW	S	NE
Sales	\$59,288,510	\$26,107,869	\$60,410,131	\$40,489,510
Sales Change (YOY)	\$164,529	\$787,151	\$584,918	\$2,642,535
Sales % Change (YOY)	0.3%	3.1%	1.0%	7.0%
Volume	12,904,729	6,693,426	12,827,040	10,976,010
Volume Change (YOY)	-44,565	365,106	-507,924	1,469,519
Volume % Change (YOY)	-0.3%	5.8%	-3.8%	15.5%

Regional Performance



Organic broccoli enjoyed double-digit year-over-year sales increases in both the Northeast (14.2%) and the South (16.7%).

	W	MW	S	NE
Sales	\$68,632,705	\$22,454,283	\$51,465,551	\$42,257,407
Sales Change (YOY)	\$4,599,788	\$972,325	\$7,374,271	\$5,249,596
Sales % Change (YOY)	7.2%	4.5%	16.7%	14.2%
Volume	21,847,883	6,864,910	15,821,847	11,280,835
Volume Change (YOY)	942,495	103,814	2,826,394	677,066
Volume % Change (YOY)	4.5%	1.5%	21.7%	6.4%

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Celery

#17 in Sales

With a tiny sales increase of 0.5% and a -1.8% drop in volume, organic celery had a lackluster 2021 in terms of year-over-year performance. The popular organic juicing vegetable brought in \$177 million in 2021 retail sales and had a 32% price premium, making it one of the more reasonably priced organic produce commodities compared to conventional.



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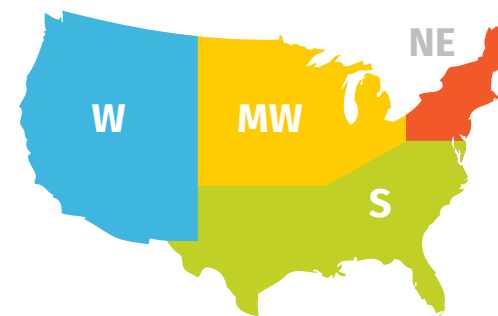


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NUTRIENTS



Regional Performance

With a 6% increase in sales and a 4% increase in volume, the South was a bright spot for year-over-year performance of **organic celery**.

	W	MW	NE	S	SE
Sales	\$48,408,123	\$27,759,789	\$54,665,953	\$45,581,135	\$45,581,135
Sales Change (YOY)	\$(3,273,091)	\$(557,795)	\$3,109,408	\$1,624,611	\$1,624,611
Sales % Change (YOY)	-6.3%	-2.0%	6.0%	3.7%	3.7%
Volume	21,092,455	12,300,798	24,121,495	14,886,351	14,886,351
Volume Change (YOY)	-1,541,041.55	-209,823	934,614	-536,976	-536,976
Volume % Change (YOY)	-6.8%	-1.7%	4.0%	-3.5%	-3.5%

Cucumbers

#18 in Sales

With double-digit year-over-year increases in both sales (10.5%) and volume (14.1%), organic cucumbers were a top performer in 2021. The refreshing organic vegetable also commanded an extremely impressive price premium of 126% over conventional, showing that consumers were willing to shell out more than double the cash for the organic version of this commodity.

“We are seeing very strong demand for euro cucumbers and have extended our Mexican season and increased production to meet that demand. We now have very steady production so can offer year-round contract pricing.”

Sydney Fairchild
Marketing and Compliance,
Bridges Produce

Squash

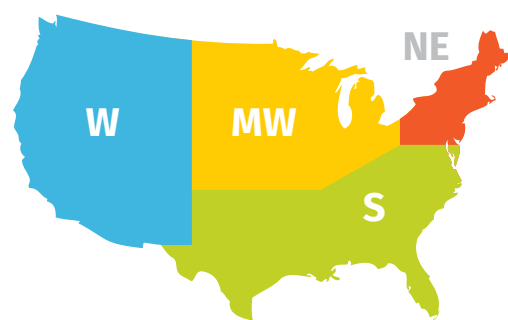
#19 in Sales

In 2021, organic squash showed significant year-over-year losses in both sales (-7.5%) and volume (-8.7%), likely due to a shift away from the consumer stockpiling of hard squash that occurred during the height of COVID in 2020. Despite its year-over-year declines, the category topped \$128 million in retail sales and showed a strong price premium over conventional of 69%.

“Organics and sustainability have always been important components of our success. To produce the best results, you have to grow the plants the way nature intended them to be. We want to be able to produce the same food that we would feed our own families.”

Michael DuPuis
Quality Assurance and
Public Relations Coordinator,
Divine Flavor

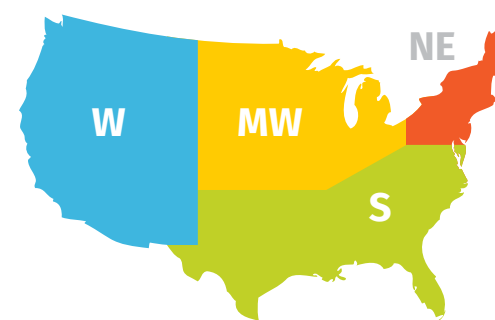
Regional Performance



Organic cucumber volume increased year over year by double digits in all four regions, and the Northeast had the strongest year-over-year sales performance (13.7%).

	W	MW	S	NE
Sales	\$48,283,210	\$23,480,955	\$46,845,896	\$40,310,880
Sales Change (YOY)	\$3,113,041	\$1,794,092	\$5,308,877	\$4,871,217
Sales % Change (YOY)	6.9%	8.3%	12.8%	13.7%
Volume	16,097,451	7,006,903	14,237,693	12,270,468
Volume Change (YOY)	1,503,849	695,805	2,178,384	1,773,024
Volume % Change (YOY)	10.3%	11.0%	18.1%	16.9%

Regional Performance



Organic squash saw its worst year-over-year performance in the Midwest, where it posted a sales loss of -13.4% and a volume decline of -13.7%.

	W	MW	S	NE
Sales	\$43,057,190	\$14,797,727	\$38,464,950	\$32,030,296
Sales Change (YOY)	\$(4,957,400)	\$(2,289,079)	\$(2,321,738)	\$(880,802)
Sales % Change (YOY)	-10.3%	-13.4%	-5.7%	-2.7%
Volume	19,566,288	6,621,232	13,237,089	10,503,920
Volume Change (YOY)	-2,724,134	-1,050,783	-579,177	-392,765
Volume % Change (YOY)	-12.2%	-13.7%	-4.2%	-3.6%

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Kale

#20 in Sales

With just over \$115 million in retail sales, organic kale posted a tepid year-over-year dollar increase of 0.9% and a similarly small volume gain of 1.4% in 2021. The organic version of this leafy green, which began exploding in popularity in the late 2000s, commanded a significant price premium of 63% over conventional, suggesting consumers saw it as a valuable organic commodity last year.

“Organic produce continued to trend upwards in 2021. Organic Kale, Brussels Sprouts, and Spinach are top items in consumers’ shopping carts. 2021 was a year of working from home and meal prepping.”

Hana Mohsin
Marketing Specialist,
Misionero

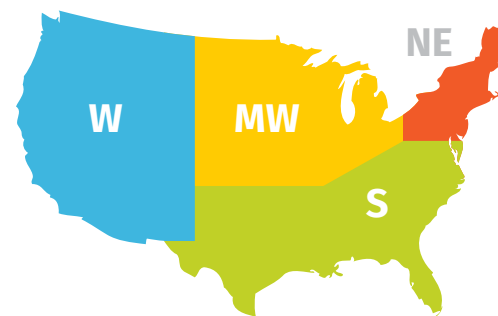
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Regional Performance



Organic kale had its biggest year-over-year volume gain in the Northeast (7.3%) and its strongest year-over-year sales performance in the South (3.2%).

	W	MW	NE	S
Sales	\$40,709,626	\$12,748,701	\$35,930,622	\$25,606,717
Sales Change (YOY)	\$167,167	\$(530,748)	\$1,104,135	\$365,232
Sales % Change (YOY)	0.4%	-4.0%	3.2%	1.4%
Volume	16,291,368	4,635,288	8,854,921	6,714,036
Volume Change (YOY)	9,307	141,855	-81,737	459,461
Volume % Change (YOY)	0.1%	3.2%	-0.9%	7.3%

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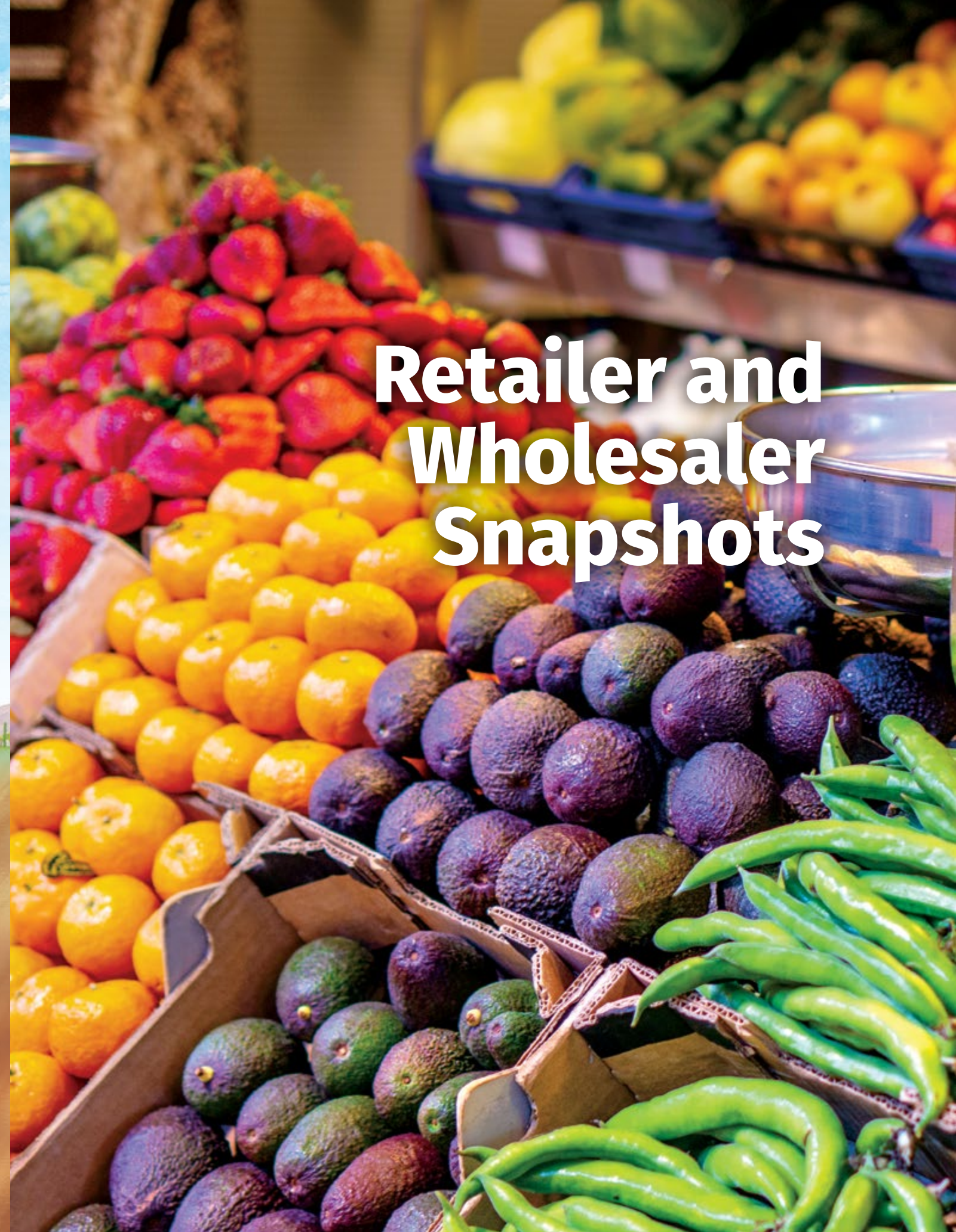
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Retailer and Wholesaler Snapshots



Retailer & Wholesaler Snapshots

As the country moved into the second year of the pandemic, sales of organic fresh produce at retail continued to climb, increasing by 5.5% percent from the previous year.



I think COVID is creating a situation where everybody is going to be a little bit more innovative.

Archie Williams

Senior Buyer,
Associated Wholesale Grocers



Clean, healthy, and environmentally friendly products are very important to us, so it's essential that we provide our customers with the choice of organic produce when available. We have also seen a rise in demand for organic produce throughout the years as people learn more about its benefits (less chemical exposure, higher nutrient density, and positive environmental impact).

Kristen Quito

Head of Product,
Eataly North America



I love the role of the buyer ... It starts with a handshake with a farmer.

Michael Schutt

Director of Produce & Floral,
Raley's



We believe in going forward in areas that we're strong in. We know we're good at organic. We're passionate about organic! And we're focused on quick turns, high quality, and excellent customer service. We want to build community and build it in a natural way by being true to who we are as a company and having honest interactions with people.

Chris Miller

Produce Director and
Meat and Seafood Coordinator,
MOM's Organic Market



Without our farmer relationships, we're nothing! We have such an amazing lineup of wonderful farmers that we work with throughout the year.

Keith Bidwell

Supply Chain Manager,
MilkRun



Over four years ago, I observed and stated that the customer/consumer wanted it all—a great in-store shopping experience, the ability to order online and pick up, and the ability to order online and have the goods delivered, all depending on their desire at the time. Not all retailers can do this, but the ones who do win! The pandemic leapfrogged this demand by half a decade, and now we must capture that demand, answer it, and grow it!

Steve Junquero

Former President and COO,
Save Mart Supermarkets



As we move forward, the food industry will be a place where survival of the fittest—the most innovative, relevant, resonant, and customer-centric retailers—will be the law of the land.

Jim Donald

Co-Chairman
Albertsons Companies



We are looking forward to the continued success of PCC's organic produce sales and the new challenges of high demand spurred by the restored freedom of post-pandemic shopping.

Joe Hardiman

Senior Produce Merchandiser,
PCC Community Markets



Organic produce sales are a big part of Stew Leonard's. I'm still seeing 10-15 percent growth every year.

Bovey Lu

Produce & Seafood Manager,
Stew Leonard's



Organics is going to continue to grow. It's going to continue to be one of our priorities to bring in. ... We're going to continue to push organics at Target. It's going to be a big goal for us as we move forward.

Robby Cruz

Vice President of Produce,
Target



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2021 Events

OPS

Organic Produce Summit

September 15-16

OGS

Organic Grower Summit

December 1-2



Organic Produce Summit



The 2021 **Organic Produce Summit** (OPS) brought together many members of the organic fresh produce community in Monterey, CA, on **September 15-16**.

With 1,200 attendees, engaging farm tours, and informative educational sessions, OPS created an energetic space for organic producers and buyers to discuss hot issues affecting the industry, including controlled environment agriculture (CEA), e-commerce, and opportunities and obstacles for organic fresh produce in a post-COVID world.

Two engaging keynote presentations focused on what the organic produce industry can do to continue its strong growth, and a sold-out trade show floor of 150 exhibitors wrapped up the fifth annual OPS.

“Indoor agriculture is increasingly playing a more meaningful role in our fresh produce supply in terms of volume, variety, and geographical footprint. The ability of indoor ag to provide predictability and resiliency for supply, coupled with its lower impact on both the environment and resource use, is drawing substantial interest from both investors and consumers. Clearly, the future will be a hybrid one, and our panels will explore how quickly and responsibly this will happen.”

Walter Robb
Former Co-CEO,
Whole Foods

“If I convey anything today, it is the power of storytelling. The future of organics and the future of supermarketing comes down to storytelling.”

Jim Donald
Co-Chairman,
Albertsons

“COVID changed the way people buy products, so retailers need to change the way they sell products.”

David Bishop
Partner,
Brick Meets Click

“As an industry, we have to relook at the way we go to business. And we can't be working on it siloed. And when I think about from the grower side of the business and the retailer side of the business, sometimes we go about it siloed versus working together on what that solution looks like. And I think ... the opportunity we have as an industry is let's be open and honest and work with each other on what [the shift to e-commerce] looks like as we move forward.”

Robby Cruz
Vice President of Produce,
Target

“Organic clearly serves the conscious consumer, and as the crisis slows down, as COVID gets normalized, we're going to ... have to answer to that consumer with a responsible package.”

Ricardo Crisantes
Chief Commercial Officer,
Wholesum

“There are 8 billion people to feed in the world. The best thing we can do is feed them organic food.”

Larissa Zimmeroff
Author and
investigative journalist



ORGANIC GROWER SUMMIT™

PRESENTED BY WESTERN GROWERS & OPN



The 2021 **Organic Grower Summit** (OGS), presented by Western Growers and Organic Produce Network (OPN), was held on **December 1-2**, in Monterey, CA. The event featured a sold-out trade show floor of organic produce supply chain and service provider partners offering organic growers the opportunity to find solutions to some of their most vexing problems.

A series of eight different educational sessions covered a wide array of important topics for organic farmers and crop specialists. The show concluded with Vic Smith, CEO of JV Smith Companies, being presented the fourth annual “Grower of the Year” award and a dynamic keynote session featuring the next generation of organic growers.

“It is energizing to hear from other organic growers and shippers about their challenges and solutions [and to] learn about new organic technologies and increasing organic market share.”

Bianca Kaprielian
Co-Founder and CEO,
Fruit World

.....
“OGS is a great opportunity for growers to get the latest in innovation and industry trends that are impacting the organic segment for fresh produce.”

Dave Puglia
President and CEO,
Western Growers

“Over the past three decades, Vic has worked tirelessly to encourage water conservation, natural methods for pest control, and always found ways to share information about those practices with other organic farmers. His dedication to the environment and community is what makes the organic sector special and [makes] him so deserving of the title of Grower of the Year.”

Greg Milstead
Director of Sales,
Southwest Region,
AGCO

“There are no shortcuts. A lot of it is learning your soil, learning your ranch, learning your trees. A lot of it is ham and eggging ... trying to figure out what works from year to year. If your acreage doesn’t lend itself to organics, don’t do it.”

Scott Mabs
CEO,
Homegrown Organic Farms

.....
“If you are not paying attention to technology, you are going to be left behind. We use a lot of technology, always looking at new ways to solve problems.”

Josh Roberts
President & General Manager,
Triangle Farms

“The unique agricultural relationship between the US and Mexico continues to evolve and adapt with strong organic expertise on both sides of the border. Mexico’s promotion of organic agriculture has bolstered organic production and continues to entice more US-based growers into entering the Mexican organic market.”

Kelly Damewood
President,
CCOF



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Diversifying Inputs, Diversifying Research

The **Rodale Institute Southeast Organic Center (SOC)** in Chattahoochee Hills, Georgia, aims to take the research strategies perfected at the Rodale Institute headquarters in Pennsylvania and tailor them specifically for farmers in the Southeast.

The team at the SOC has partnered with Clemson University to study the effects of diverse organic inputs such as cereal rye, hairy vetch, and chicken manure combinations on vegetable production. Comparing Piedmont heavy clay to Coastal Plain sandy soils, two major land resource areas supporting organic farmers in the Southeast, researchers are focusing on soil health, yield, and nutrient quality under conventional and reduced-till systems.

While the nutrient analysis is still outstanding, the research team made progress looking at the cover crop biomass in the first year. In 2021, the seeding rate of 60lbs/acre rye and 15lbs/acre vetch were found to be not nearly enough to provide weed control. Biomass between the two sites ranged from 1,200 lbs/acre to 3,000 lbs/acre. However, 4,000 - 10,000 lbs/acre, depending on climate and soil microbial activity, has shown to be necessary for weed control. In the next year of the project, seeding rates will be doubled and reanalyzed.



CDFA Reports Organic Agriculture in California Continues to Grow

The **California Department of Food and Agriculture (CDFA)** reports that California accounts for 36 percent of all organic production in the United States, with figures for organic production and organic sales continuing to grow.

According to the most recent numbers, California organic production increased 22 percent from 1,796,080 acres in 2014 to 2,186,551 acres in 2020. This includes a 6 percent increase between 2,064,883 acres in 2019 to the 2020 figure.

In regard to the most recent sales of organic products in California, CDFA reports 2020 sales totaled \$11.99 billion, which is an increase of 14 percent from 2019. Statewide producer, handler, and processor gross sales in 2020 were \$4,109,254,903, \$6,200,411,415, and \$1,681,671,636, respectively. The top five counties in terms of overall gross sales for 2020 were Monterey County, Los Angeles County, Santa Cruz County, Kern County, and Merced County.

The information mentioned above and more can be found in the "California Agricultural Statistics Review 2020-2021," scheduled to be published in early 2022 on the CDFA California Agricultural Production Statistics webpage.



April Joy Farm Talks Food Insecurity



April Joy Farm is a 24-acre diversified certified organic farm in Ridgefield, Washington. Owner/farmer and **Organic Farming Research Foundation (OFRF)** board member April Thatcher is interested in improving soil health and native habitat and growing organic food for a CSA program and a local community partnership that addresses food insecurity.

April Joy Farm utilizes solar energy and partners with its utility company's "Green Lights Program" to offset 100 percent of its electricity use each year. In 2020, 61.5 percent of the farm's energy came from an on-farm solar array, avoiding roughly 7.2 metric tons of CO2 and sequestering carbon equivalent to 120 tree seedlings grown for 10 years.

"I've reduced my energy expenses and improved my farm's carbon footprint," says Thatcher. "I'm proud to be providing leadership for my entire community around energy efficiency, and my customers appreciate that their farmer is focused on reducing the environmental impacts of our collective 'food-print.'"



Growing Future Organic Farmers

The **CCOF Foundation's Future Organic Farmers** grant is the only fund in the nation that provides grants exclusively to organic agriculture students. Along with funding partners, CCOF supports this new generation of organic professionals through direct financial assistance for organic education. These students are the future of organic agriculture!

Adelio Coronel, a Future Organic Farmer grant recipient, is committed to growing healthy organic food to support his local community and the environment. Coming from a long line of farmers, Coronel always knew that he wanted to continue the tradition. "Chemicals may be easier and faster, but at the same time it's hurting us in the end. Many people built this organic movement, and I believe in moving it forward by providing healthy food and a better environment," he says.

Armed with the technical and educational support of ALBA's PEPA program and the direct financial support from the CCOF Foundation, Coronel now runs his own small organic farm. "The grant was the motivation that enabled us to move on," he says. "It helped pay for my studies and buy the things I needed to get started farming. Every dollar was well invested, and it served me a lot. It was an emotional realization to know that I can do this; I'm not alone—it was really tremendous." The CCOF Foundation will continue supporting the vision of students like Adelio Coronel—to help them thrive as organic farmers and land stewards.



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