



**ORGANIC
TRADE
ASSOCIATION**

The background of the cover is a circular collage. It features a world map in the upper left, a close-up of green leaves in the lower right, and a central image of a large cargo ship at a port with yellow and red containers and green cranes. A semi-transparent green circle is overlaid on the center of the collage.

U.S. ORGANIC EXPORTS REPORT

2025

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EXPORT OVERVIEW



Only companies with U.S. based manufacturing or farming operations were asked to complete the export questions. Companies with operations outside of the U.S. were only asked to participate if they actively exported good originating in the U.S. to other international destinations.

Of the 79 U.S. based companies completing the organic market sizing survey, which was fielded in parallel with the export survey, 56% indicated that at least some portion of their sales are international. This is a notable change from the 61% who reported they export in the 2024 survey, but that is likely due to the more export-focused companies completing only the export survey, not the overall market survey. On average these companies reported 84% of their organic products sales within the U.S. market, meaning roughly 16% of sales were shipped internationally. This domestic sales percentage is slightly less than the 90% reported last year, though remains steady among manufacturers alone (83%) which appears to equate to stronger exports for this group in 2024 as compared to the previous year's 96% of domestically reported sales.

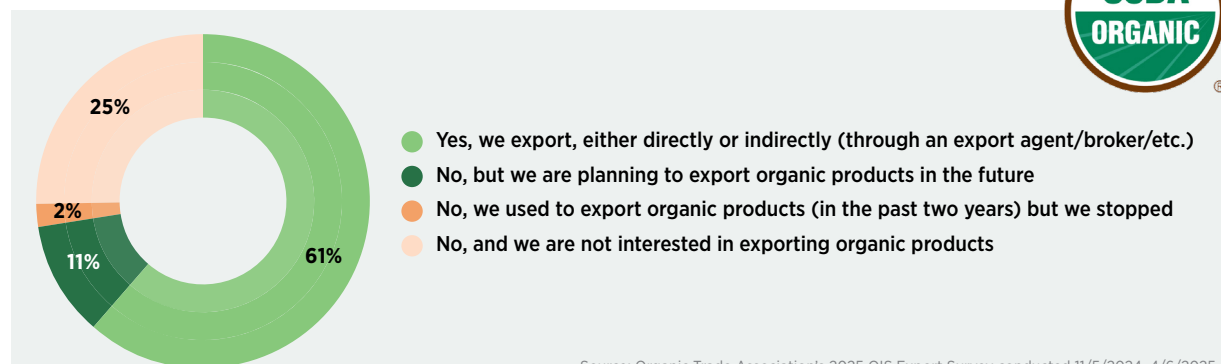
Among the companies with U.S. facilities completing either the market sizing or export surveys, 61% indicated that they are currently exporting, including 66% of non-growers. This



is down slightly from last year, when 69% of respondents indicated that they were exporting (68% of non-growers), but up from the 51% reported in the 2023 survey.

The smallest companies continue to be the least likely to export, while medium-sized companies appear to be most interested. Of those with total organic product revenue (both domestic and foreign) of greater than \$50 million, 63% are exporting, and 70% of those with revenue in the \$5million to \$50 million range are exporting. Only 44% of those with an annual organic revenue of under \$5 million are exporting. Last year, the results were similar, with 43% of small companies exporting.

FIGURE 1.1. Does your company currently export organic products outside the U.S.?



Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024–4/6/2025 and Organic Industry Survey conducted 10/31/2024–1/27/2025. n=114

ESTIMATED ORGANIC EXPORT MARKET VALUE

Based on U.S. organic sales totaling \$71.6 billion in 2024 and considering that 75% to 80% of the domestically sold organic products are from U.S.-based manufacturers and growers, organic exports are estimated at approximately \$3.3 billion, or 4.7% of the value of domestic organic product sales. This estimate reflects both the product categories most likely to be exported and the limited exports tracked by the United States Inter-

national Trade Commission, which primarily covers fresh produce, dairy, and coffee. More than 90% of those export sales are estimated to be from organic food products, with refrigerated products like dairy and meat being the least exported food products. Fresh produce is estimated to account for about 24% of exports while non-food products continue to contribute less than 10% of export revenue.



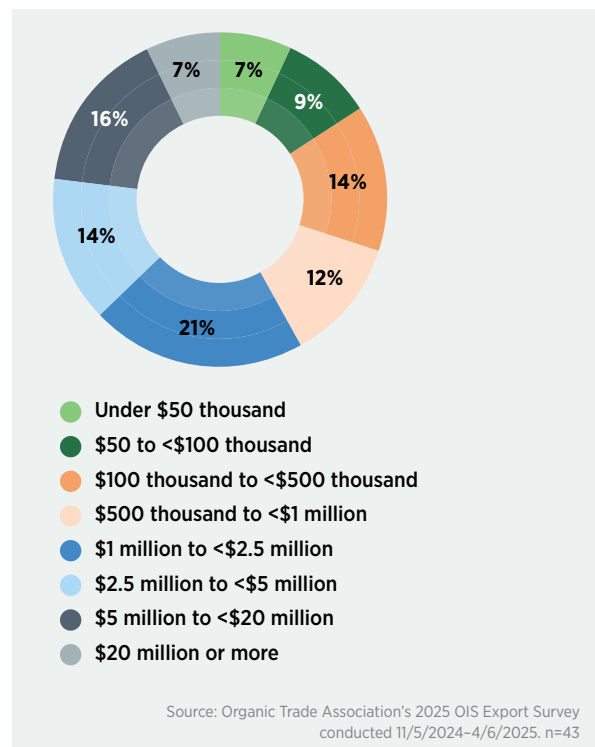
EXPORTING COMPANIES



EXPORTER PROFILE

Companies both large and small are exporting products, resulting in a wide range of organic export volumes. For 16% of respondents, the value of organic exports in 2024 was less than \$100 thousand, which is similar to the 20% reported last year. 58% reported that their organic exports exceeded \$1 million in value, which is a slight increase from the 52% who reported those sales levels last year.

FIGURE 2.1. What is your estimated total 2024 *organic* export sales volume (include sales of all organic products manufactured in the U.S. and sold with the intent of exporting outside of the U.S., including sales to U.S. export agents/brokers)?



For the second year in a row, none of the companies surveyed indicated that they had started exporting organic products in the last year. On average, companies have been exporting organic products for 14 years, which is in line with the range of 10 to 15 years reported over the last several years.

FIGURE 2.2. For how many years has your company been exporting organic products?

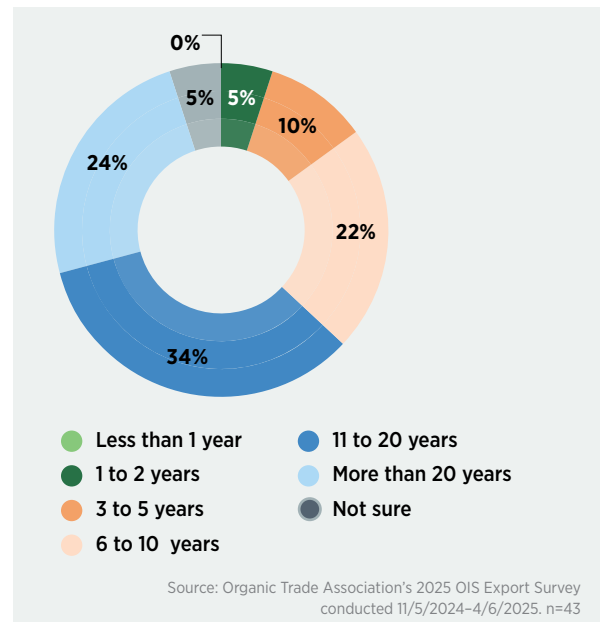
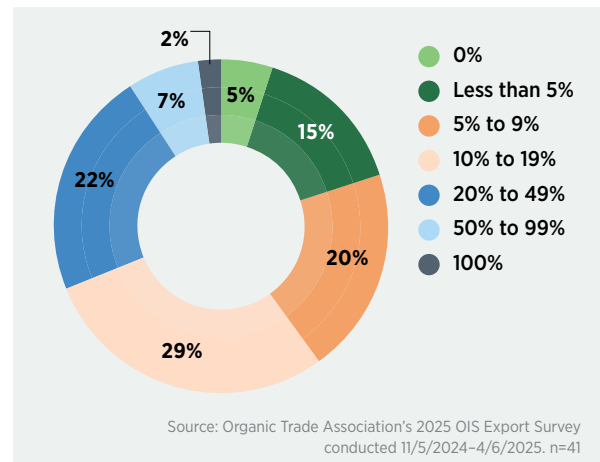


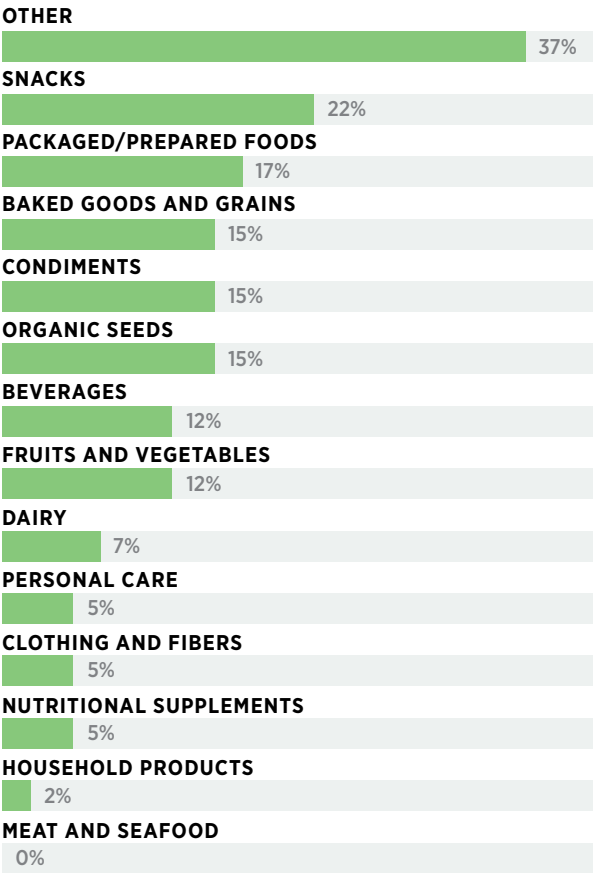
FIGURE 2.3. What percentage of your 2024 *organic* sales are expected to be exports (include sales to U.S. export agents/brokers)?



Companies are exporting a wide variety of products, including 22% who indicated that they are exporting organic snacks. Last year, packaged/prepared foods was the most popular consolidated organic product category, but this year the snacks category was more popular.



FIGURE 2.4. What type of **organic** products did you export in 2024?



Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024–4/6/2025. n=41

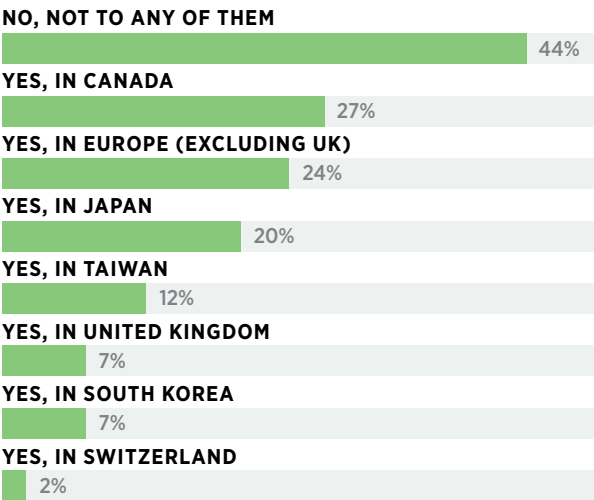
The ever important “other” category included these items this year:

- Organic mints and pastilles
- Flavors
- Food ingredients
- Couscous/pasta/rice/grains
- Vegetable oils
- Lentils, chickpeas, grains
- Oils, peanut butter powder
- Dried whole leaf sea vegetables
- Mattresses and bedding
- Herbal tea
- Organic almonds
- Bedding
- Feed ingredient
- Oats
- Almonds

ORGANIC EQUIVALENCY

Positive sentiment regarding organic equivalency agreements flagged a bit this year, with 44% of respondents indicating that these agreements have not had a positive effect on their exports, up from 38% last year. Canada continues to be the region where agreements have had the largest positive impact, but with only 27% of companies reporting that positive impact this year, the perceived bump is down considerably from the 43% who indicated positive effects from the Canadian equivalency agreement last year. Exporters are more positive about Europe this year, with 24% reporting that the agreements have helped, up from last year's slump of 10%.

FIGURE 2.5. Since the implementation of equivalency arrangements between each of the listed countries, have your organic exports increased to any of these countries?



Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024–4/6/2025 and Organic Industry Survey conducted 10/31/2024–1/27/2025. n=41

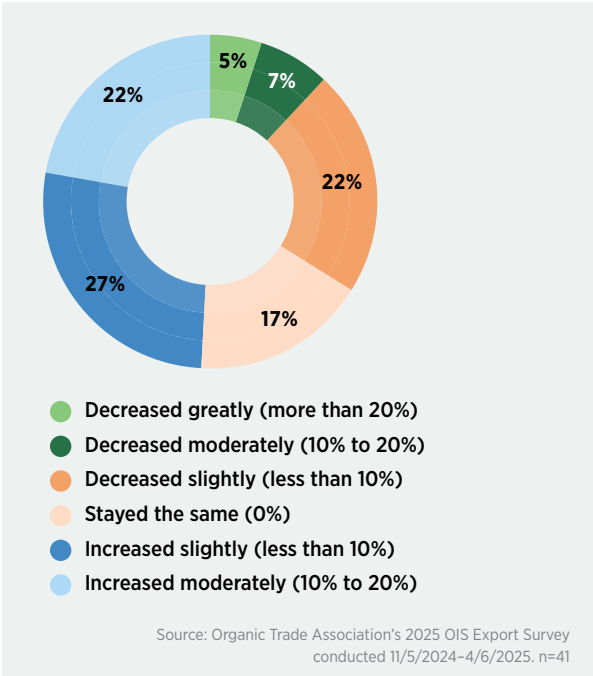


EXPORT GROWTH

Approximately half (49%) of companies surveyed indicated that their organic exports increased in 2024. While this is down from the 61% who reported sales increases for 2023, it's on par with the 50% who reported increases for 2022.

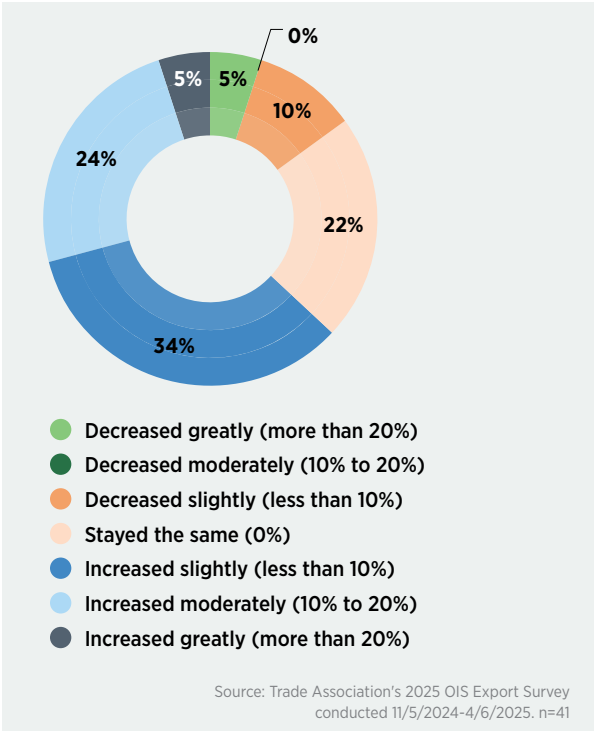
Overall growth of exports for 2024 is estimated to have been in the low single digits, with growth appearing to slow compared to 2023 rates. While many companies reported gains, others indicated large reductions in their export sales.

FIGURE 2.6. Did your organic exports sales increase or decrease from 2023 to 2024?



Approximately two-thirds (63%) of companies are expecting organic exports to increase in 2024, which is an optimism that is typical of forecast growth. Export sales expansions of more than 10% are being predicted by 29% of respondents, which is up from the 14% predicting this type of growth in 2024. Indeed, it appears that restrained optimism was well placed for 2024, so hopefully the stronger predicted growth for 2025 will be on point.

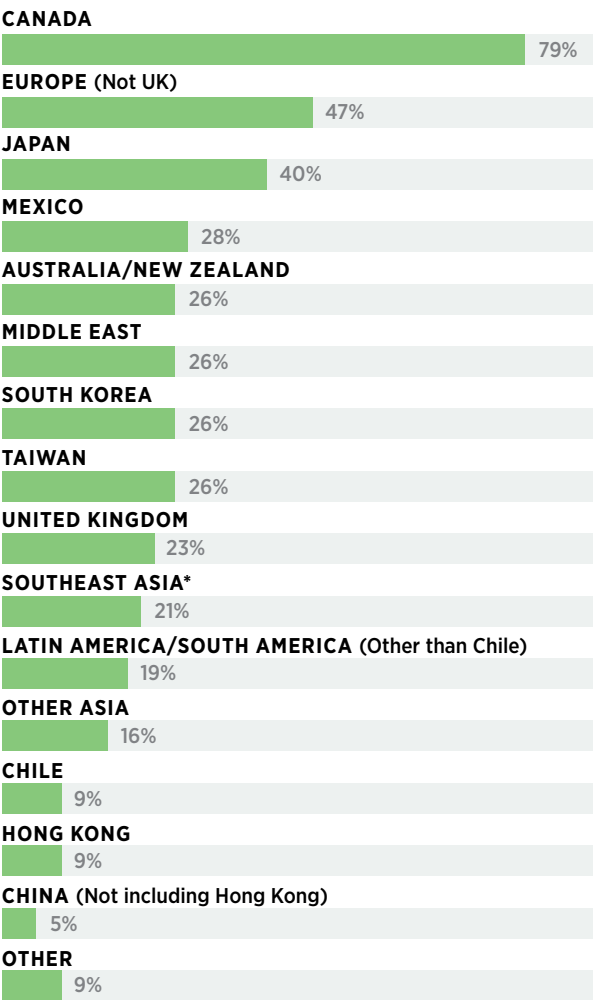
FIGURE 2.7. Do you expect your organic exports sales to increase or decrease from 2024 to 2025?



EXPORT EXPANSION

Canada, Europe (excluding the UK), and Japan are the most common export markets for these companies. In fact, four out of five surveyed companies are exporting to Canada.

FIGURE 2.8. To which of these countries are you currently exporting *organic* products from the U.S.? To which of these countries are you currently exporting *organic* products from the U.S.?



*Singapore, Malaysia, Vietnam, Philippines, Indonesia, Thailand

Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024-4/6/2025. n=43

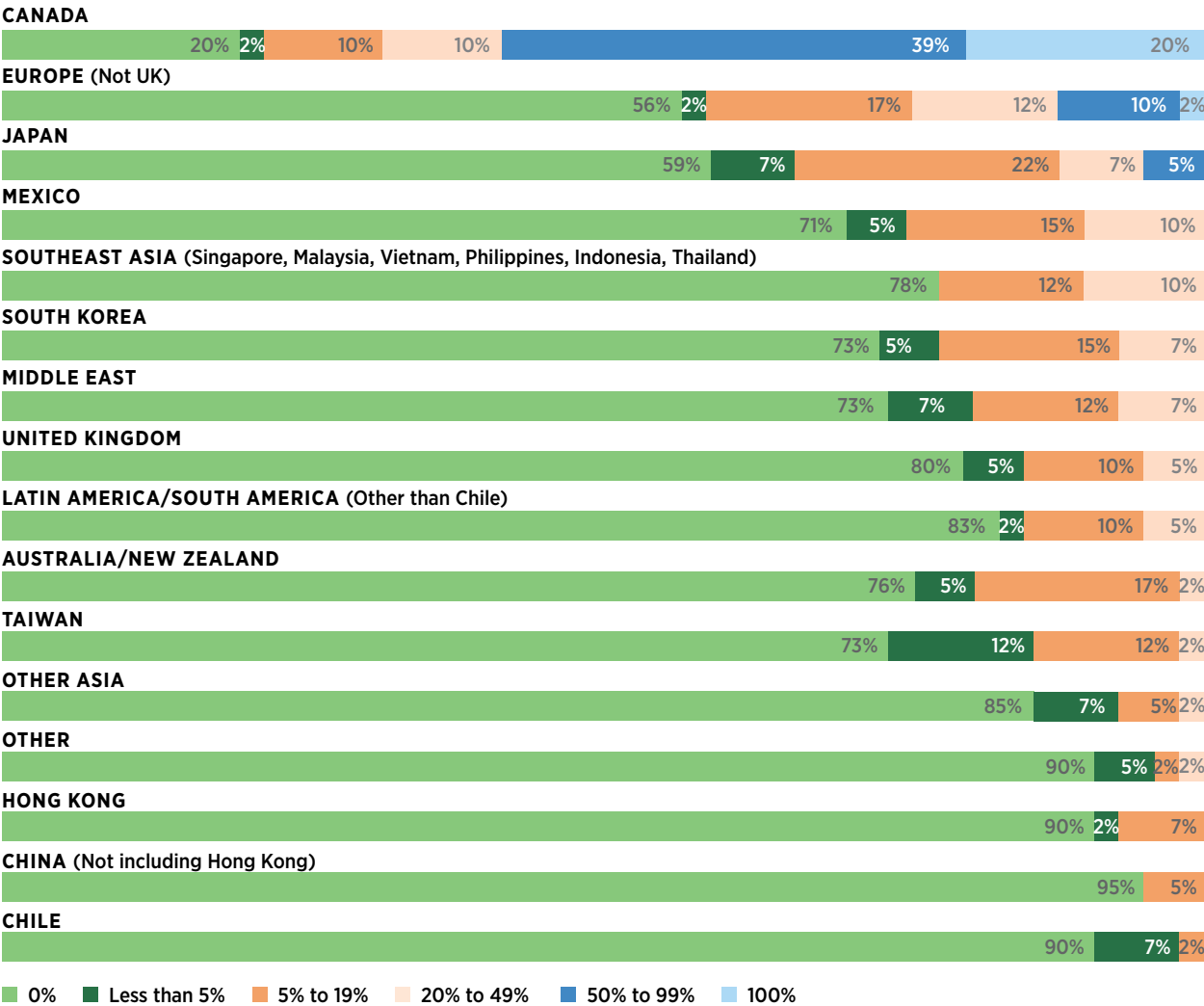
In terms of sales allocation, Canada is also the largest. On average, Canada accounts for 53% of organic export sales reported here, followed by Europe with 14% of sales and Japan at 7%. 59% of surveyed exporters indicated that Canada accounts for at least half of their export sales.

Other export areas mentioned included:

- Ghana, South Africa
- Caribbean
- United Arab Emirates, Dubai, Kuwait
- Caribbean



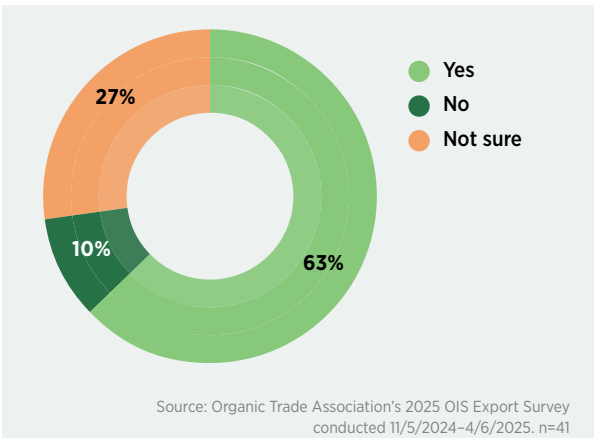
FIGURE 2.9. What percentage of your organic exports (by sales dollars) are sold to each of these countries?



Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024–4/6/2025. n=41

Two-thirds (63%) of companies that export organic goods are planning to expand into new markets while only 10% have no plans to enter new markets in the next two to three years. Companies appear to be more optimistic about market expansion than they were last year, when only 44% had plans to enter new markets in 2024–2026.

FIGURE 2.10. Do you plan to enter new export markets in the next 2–3 years?

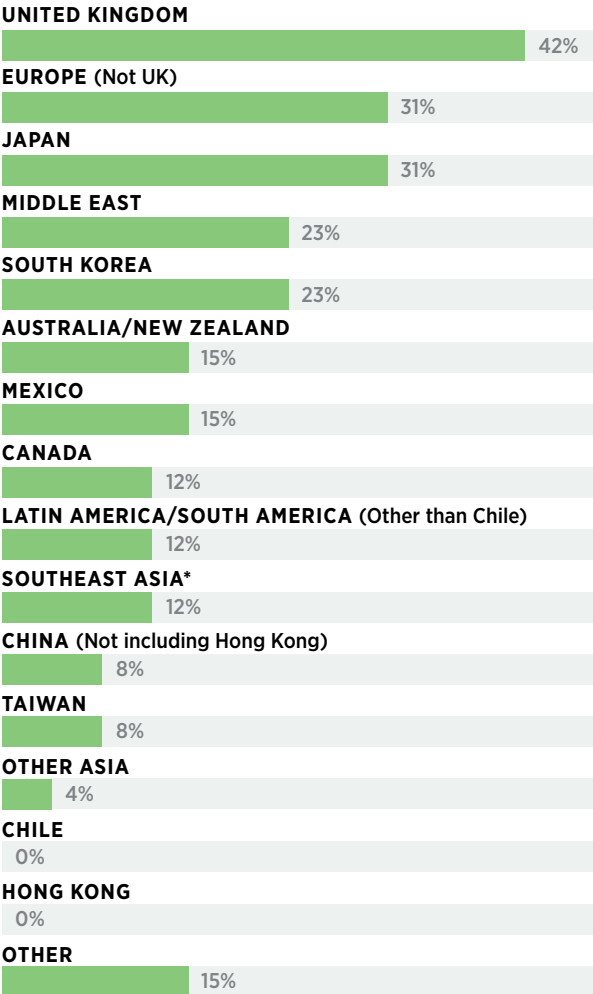


As a sign that trade is rebalancing post-Brexit, 42% of companies are interested in beginning to export to the United Kingdom in the next two to three years. Mainland Europe and Japan are also destinations of interest. The UK was also one of the top countries of interest last year.

Other listed areas of expansion include:

- Latin America
- West/South Africa
- Middle East, Asia, Europe, Latin America
- Canada

FIGURE 2.11. To which regions do you anticipate expanding your organic exports in the next 2-3 years?



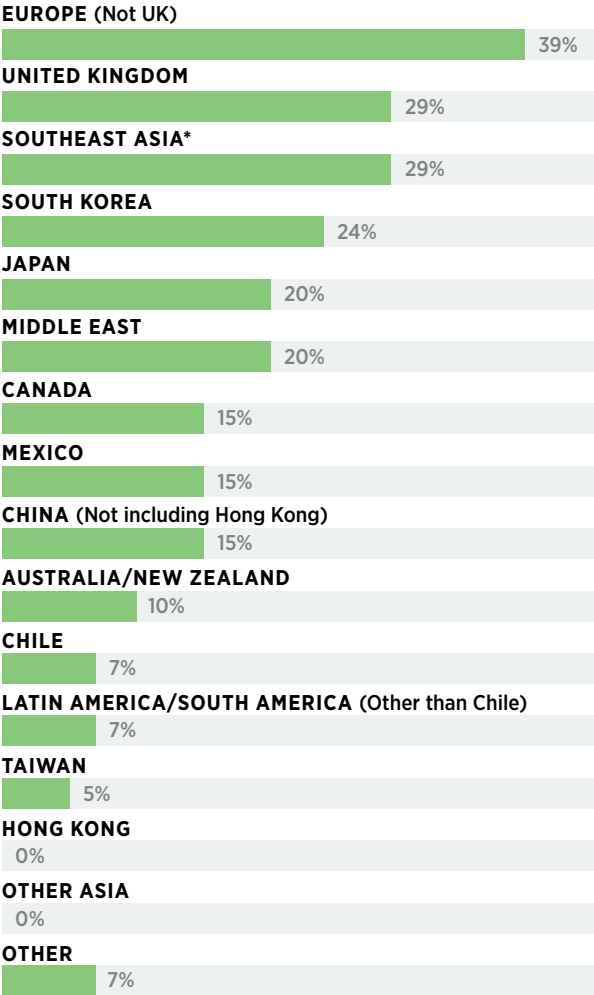
*Singapore, Malaysia, Vietnam, Philippines, Indonesia, Thailand

Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024-4/6/2025. n=26

Mainland Europe is perceived by 39% of organic exporters as offering the most exciting new export opportunities, with the UK and Southeast Asia following close behind. This is a change from last year when companies were more interested in opportunities in Mexico and Canada.

Several companies mentioned that they aren't sure that there are any exciting new opportunities currently, partially driven by political and tariff concerns.

FIGURE 2.12. What global region(s) offers the most exciting new organic export opportunities?



*Singapore, Malaysia, Vietnam, Philippines, Indonesia, Thailand

Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024-4/6/2025. n=41

EXPORT BARRIERS

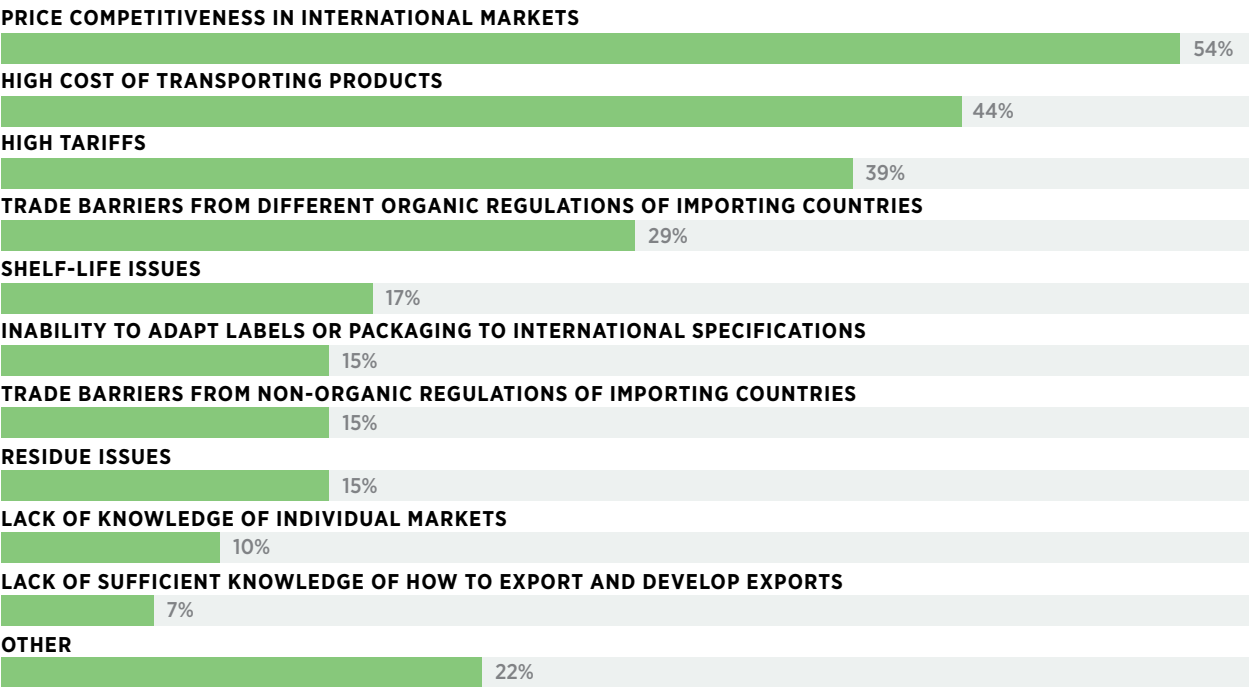
For more than half (54%) of companies participating in the organic export market survey, international price competitiveness is seen as the biggest barrier to their success as exporters. The high cost of transporting products along with high tariffs are also significant concerns. Price and transport were top factors last year, while tariffs are more top-of-mind than they were a year ago.



Other barriers mentioned were:

- Limited supply
- Logistics—hard to reach ports of export from the Midwest
- Sufficient supply, relationship building, time and focused effort needed
- Dedicated staff and time
- The organic tracing requirements are a *lot* of work for the value sometimes
- Finding the right trade partners
- Not applicable
- Consumer demand
- Anti-USA sentiment and tariff retaliation

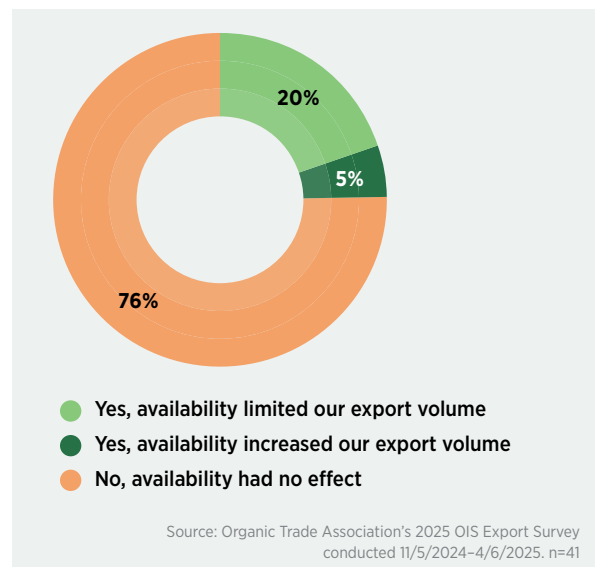
FIGURE 2.13. What are the biggest impediments/barriers to exporting to other countries?



Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024–4/6/2025. n=41

For three out of four companies, raw material supply didn't have an impact on their export volumes, but 20% did report constraints had limited their potential export volume. This view of the supply situation is similar to what was reported last year—when 23% of exporters had indicated that supply was limiting their export volumes.

FIGURE 2.14. In 2024, was the availability of organic raw materials a factor related to your company's organic exports sales volume?



Unfortunately, nearly half (44%) of exporters reported having to discontinue exports to certain countries in 2024 due to factors outside of their control. For 20% of respondents, competitiveness was the biggest issue, while supply and tariffs were also important concerns.

Additional countries/reasons mentioned:

- Japan due to high duty compared to dairy from New Zealand and Europe
- The supply of organic raw material is very low in the U.S. and the price is not competitive
- Japan (competitiveness)
- Port strikes and tariffs are an ongoing (large) threat
- 2-4D drift on products shipping to Europe so product was rejected
- Canada (2) [Competitiveness, tariffs]
- U.S./Europe Equivalency is not equivalent on exports

Reasons for discontinuing exports have shifted dramatically compared to last year when tariffs were of only minor concern while new organic regulations were causing more heartache.

FIGURE 2.15. Have you had to discontinue exports to any country in the last year for reasons outside of your control?



Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024–4/6/2025. n=41

NON-EXPORTING COMPANIES



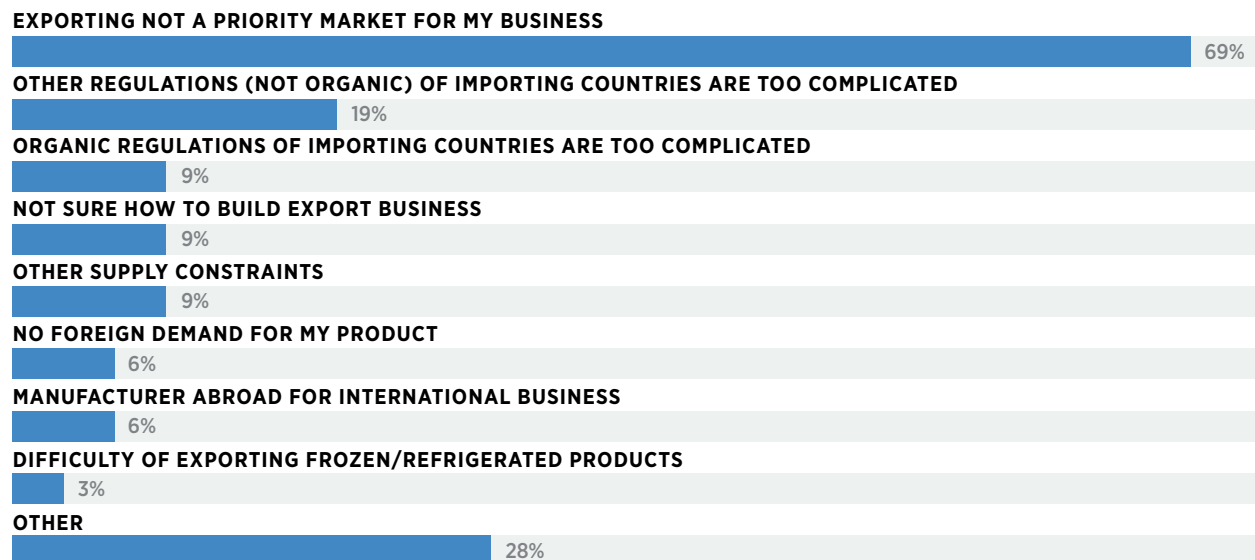
REASONS FOR NOT EXPORTING

Companies who do not export have other business priorities, as 69% indicated exporting was not a priority this year. There is a wide array of issues that discourage these companies from exporting, including regulatory concerns—related to organic (9%) and non-organic (19%) issues.

Beyond the answer options provided, the “other” reasons mentioned included:

- Not interested
- We are not meeting the domestic demand
- Lack of organic dairy supply (2)
- Company does not have expertise in this area and think market opportunity is limited
- We specifically want to keep our food local
- We make goods abroad and import into the U.S. We have had private label business in which goods made in Mexico were exported to Europe.
- Substantial domestic market still to be captured
- Competition
- No margin to spend money to export

FIGURE 3.1. Why is your company not currently exporting organic products?

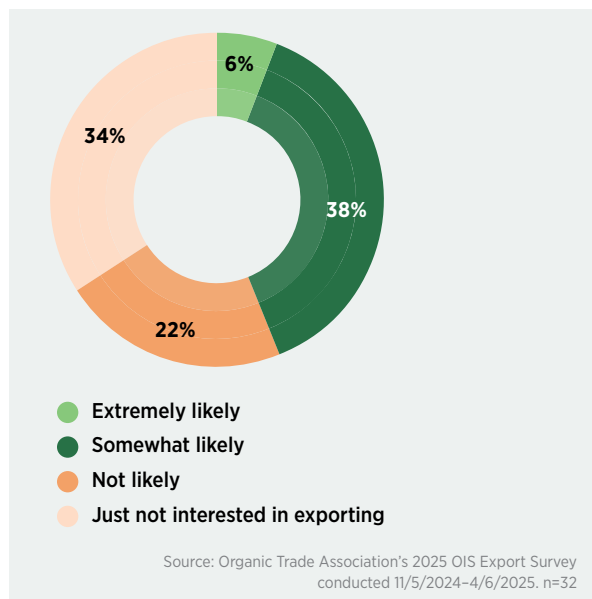


Source: Organic Trade Association's 2025 OIS Export Survey conducted 11/5/2024–4/6/2025, n=32

FUTURE INTEREST IN EXPORTING

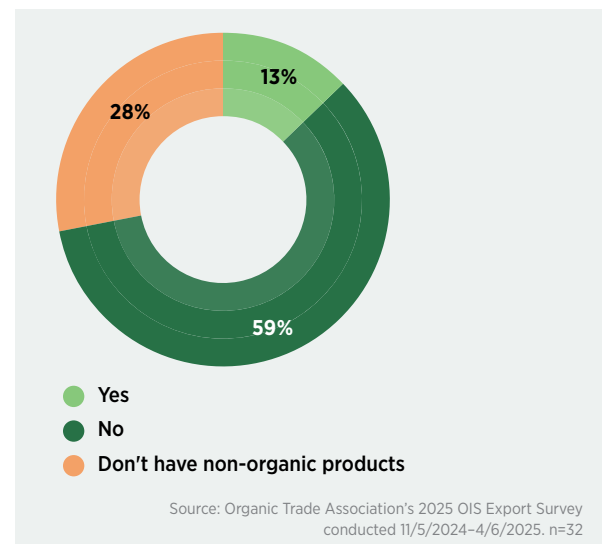
There are signs that some companies would be interested in exporting organic products if barriers were removed, with 38% indicating that it was somewhat likely they would start exporting and 6% indicating it was extremely likely.

FIGURE 3.2. If these barriers were resolved, how likely would your company be to start exporting its organic products?



Most companies that aren't exporting organic products are also not exporting their non-organic products. Only 13% of these companies export non-organic products, which is consistent with last year's findings.

FIGURE 3.3. Do you export your non-organic products?



OTA SUPPORT TO ENCOURAGE EXPORTING



When asked what OTA could do to help encourage companies to export their organic products, here is what respondents said:

- Not sure (2)
- Project finance sources for domestic solutions
- Keep up the fight (for us all)
- Cover the cost
- Provide tools to understand the certification equivalencies with other countries.
- OTA should keep training Brand Owners (formulators, and marketers of supplements) on the value of USDA NOP certification and the protocols that they must follow in order to use the USDA Organic logo.
- Find market for my product
- Tariffs providing a very uncertain business plan for us



METHODOLOGY AND ACKNOWLEDGMENTS



METHODOLOGY

The Organic Trade Association's (OTA) 2025 Organic Export Survey was conducted and produced by the trade association in conjunction with the key partners acknowledged below.

In order to encourage deeper industry participation in the organic exports survey, companies completing OTA's annual market sizing survey were asked an introductory question about their U.S. organic export activities. Those who are actively exporting were then directed to the separate OIS exporter survey, which was fielded from November 5, 2024 through April 6, 2025. Additionally,



companies with a significant focus on organic product exports were directly invited to participate in the export survey. This combined effort resulted in a larger response rate than in recent years.

ACKNOWLEDGMENTS

ORGANIC TRADE ASSOCIATION

The Organic Trade Association (OTA) is the membership-based business association for organic agriculture and products in North America. It is the leading voice for the organic trade in the United States, representing more than 500 organic businesses across 50 states and 9,500 organic producers through its Farmers Advisory Council. Its members include growers, shippers, processors, certifiers, farmers' associations, distributors, importers, exporters, consultants, retailers, and others. Its Board of Directors is democratically elected by its members. Its mission is to promote and protect organic with a unifying voice that serves and engages its diverse members from farm to marketplace.



The Organic Trade Association would also like to thank the following individuals for their work on the report:

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