



20 EUROPEAN 25 ORGANIC CONGRESS

**STRENGTHENING ORGANIC ROOTS FOR
A COMPETITIVE AND SUSTAINABLE 2050**

25-27 JUNE

WARSAW, POLAND

#EUorganic2030

#EOC2025



US Perspectives Market review - Organic Market Trends 2025

Presented by

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Co-CEO



**ORGANIC
TRADE
ASSOCIATION**





ORGANIC TRADE ASSOCIATION



The Organic Trade Association (OTA) is the membership-based business association for organic agriculture and products in North America.

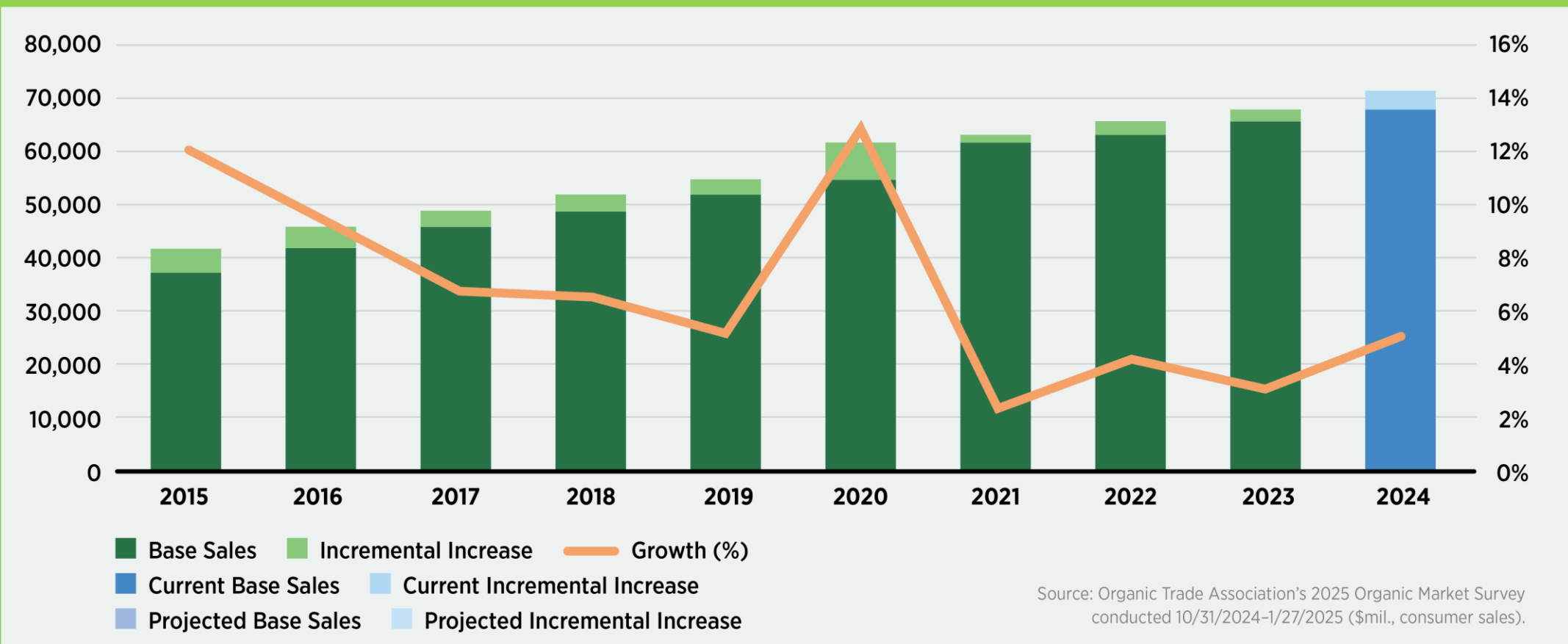
OTA IS THE LEADING VOICE FOR THE \$70+ BILLION ORGANIC INDUSTRY IN THE UNITED STATES, REPRESENTING ORGANIC BUSINESSES AND PRODUCERS ACROSS THE NATION.

Its members include growers, shippers, processors, certifiers, farmers' associations, distributors, importers, exporters, consultants, brands, retailers and others. OTA's mission is to promote and protect ORGANIC with a unifying voice that serves and engages its diverse members from farm to marketplace.



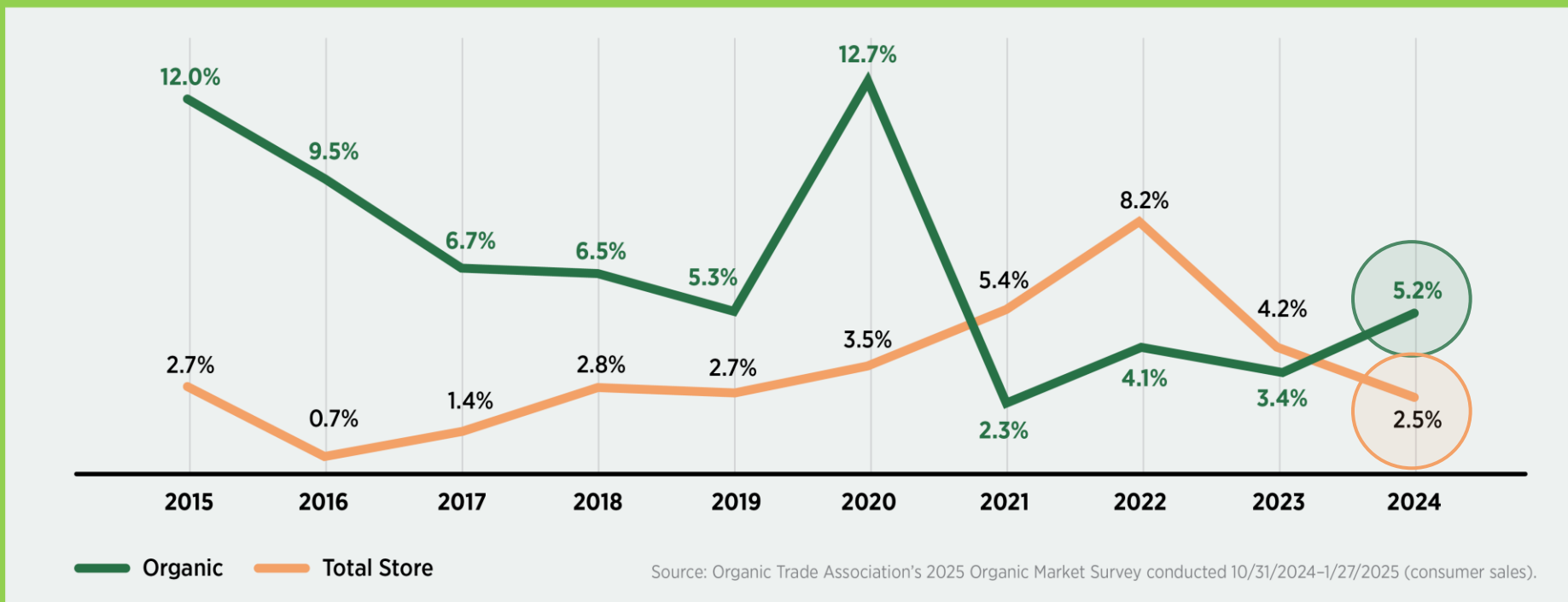
U.S. Organic Marketplace Reached \$71.6 Billion

Total U.S. Organic Sales and Growth, 2015–2024



Organic sales growth over double total sales growth rate

U.S. Organic vs. Total Store Growth, 2015–2024

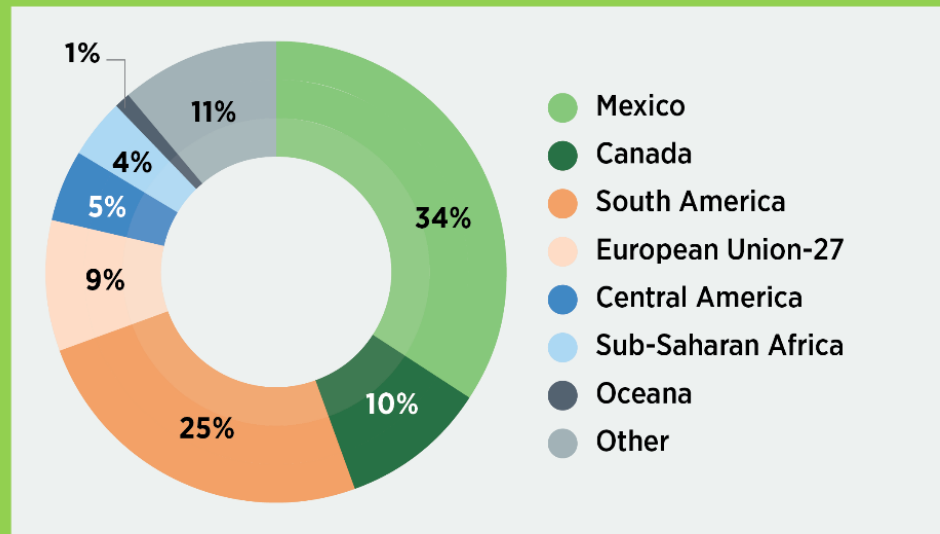


Over 20 subcategories have more than \$1 B+ sales



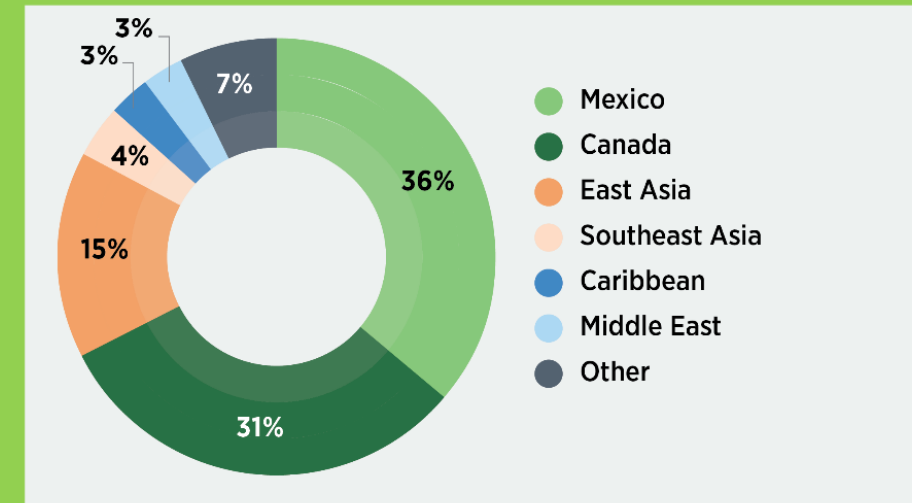
US major trading partners of organic goods

Organic Imports into the U.S. by Region of Origin in 2024



Source: USDA Foreign Agricultural Service, GATS database, commodities with organic HS codes, Jan.-Nov. 2024.

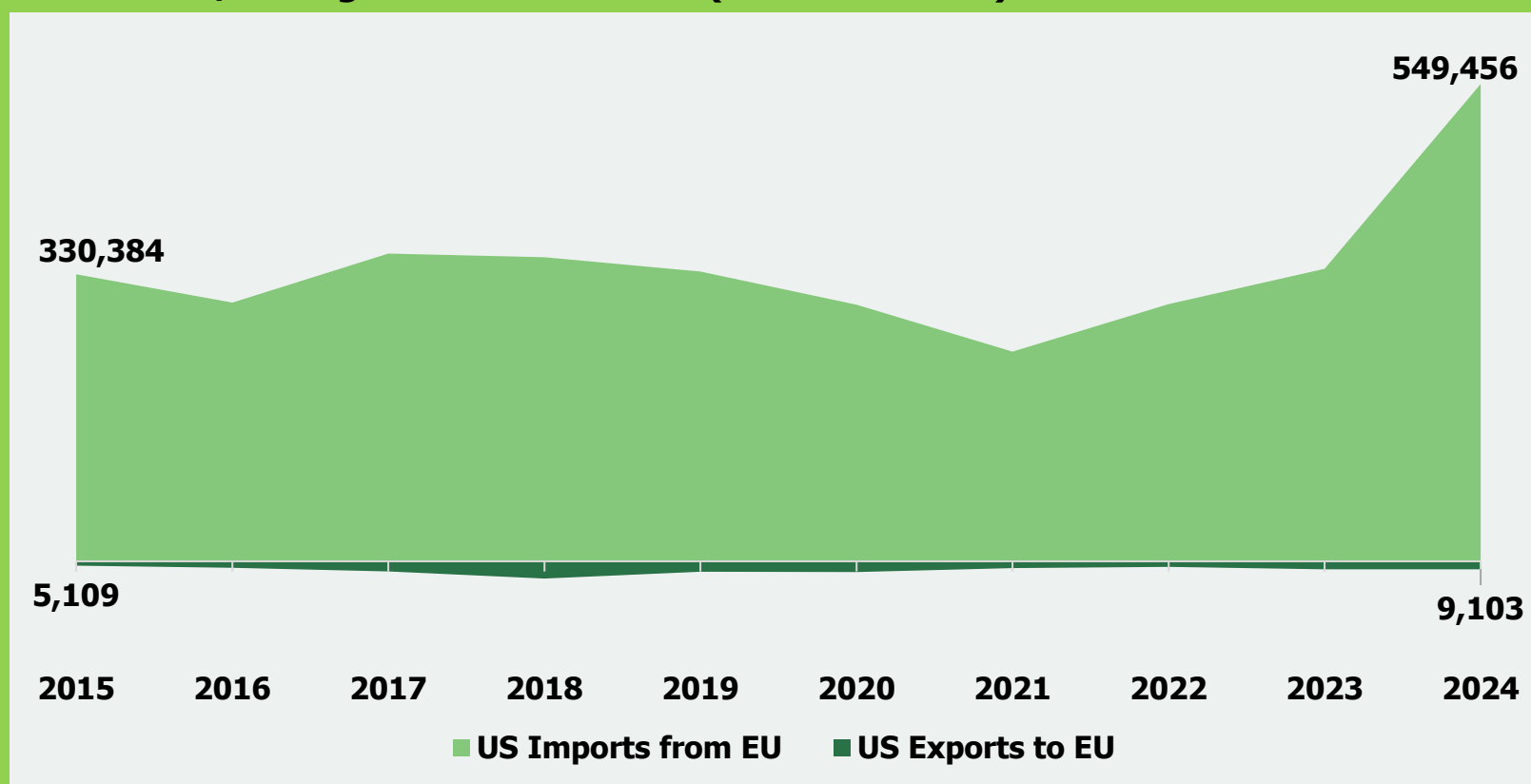
Organic Exports from the U.S. by Destination Region in 2024



Source: USDA Foreign Agricultural Service, GATS database, commodities with organic HS codes, Jan.-Nov. 2024.

Trading imbalance a focus of current administration

Tracked US/EU Organic Trade Balance (thousands USD)



Source: USDA Foreign Agricultural Service, GATS database, commodities with organic HS code: 2015-2024

Tariff Tussle

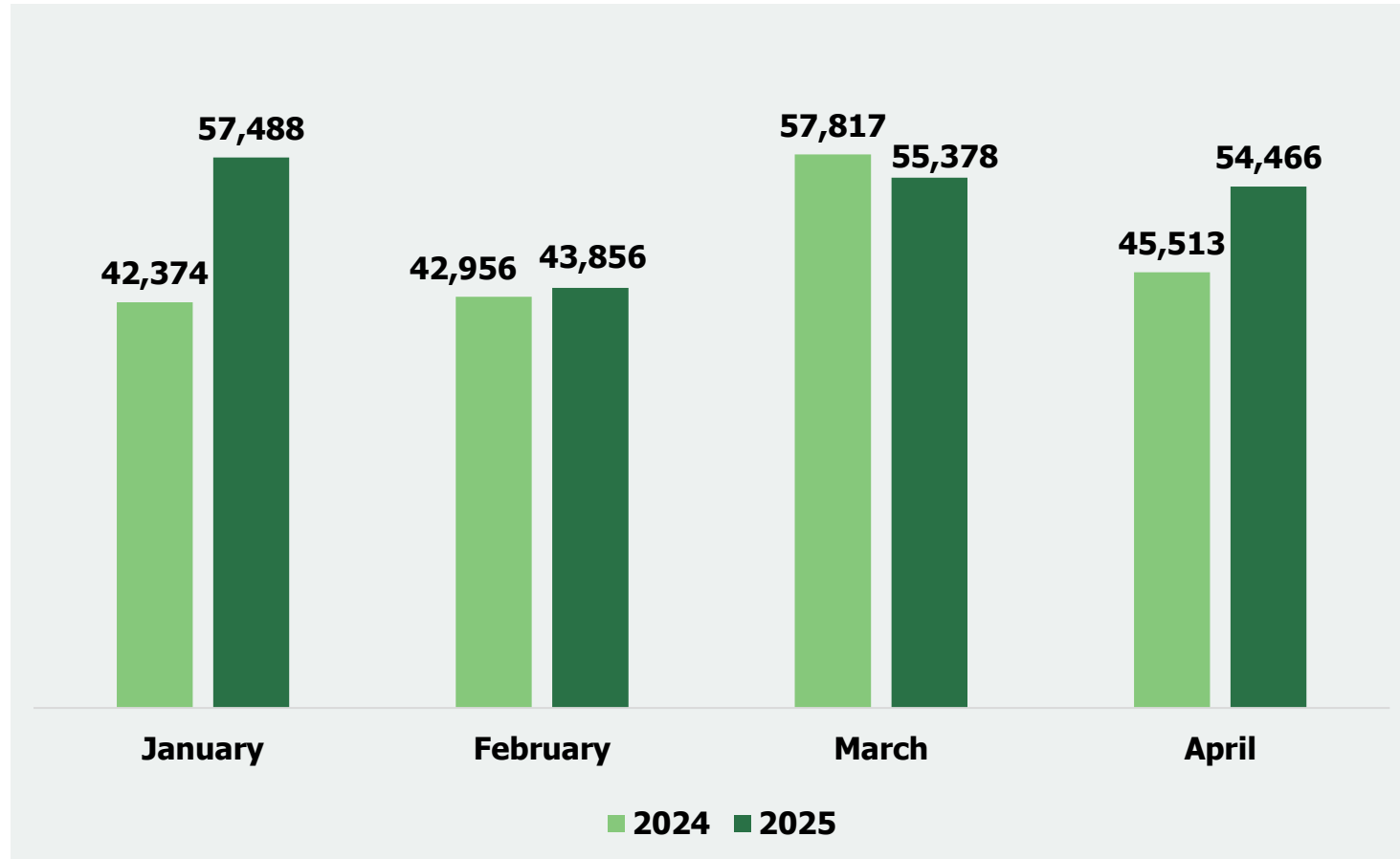


- Tariff landscape rapidly shifting
- Used for trade deficit, policy tool and negotiation tool
- Friend or foe
- Proposed tariffs - Chinese ships
- Threat of 50% tariffs on EU goods
- Reciprocal tariffs - 90 day pause to July 9th
- 232 Investigations – steel/aluminum copper, circuits, critical minerals, lumber, movies, pharmaceuticals, semiconductors, trucks/parts.

Tariff Tussle



Tracked EU Organic Imports to US Jan-April 2024 and 2025 (thousands USD)

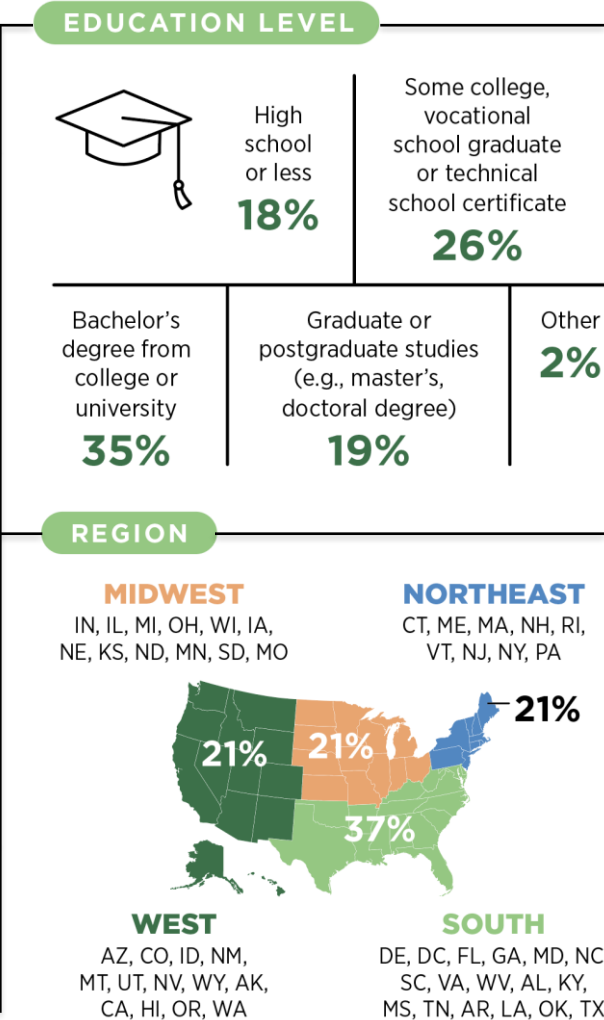
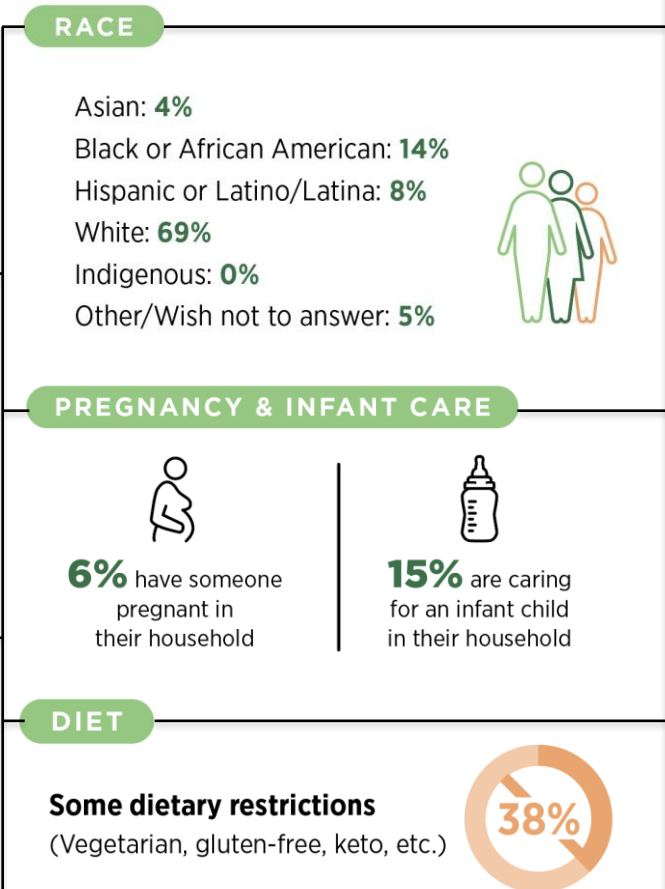
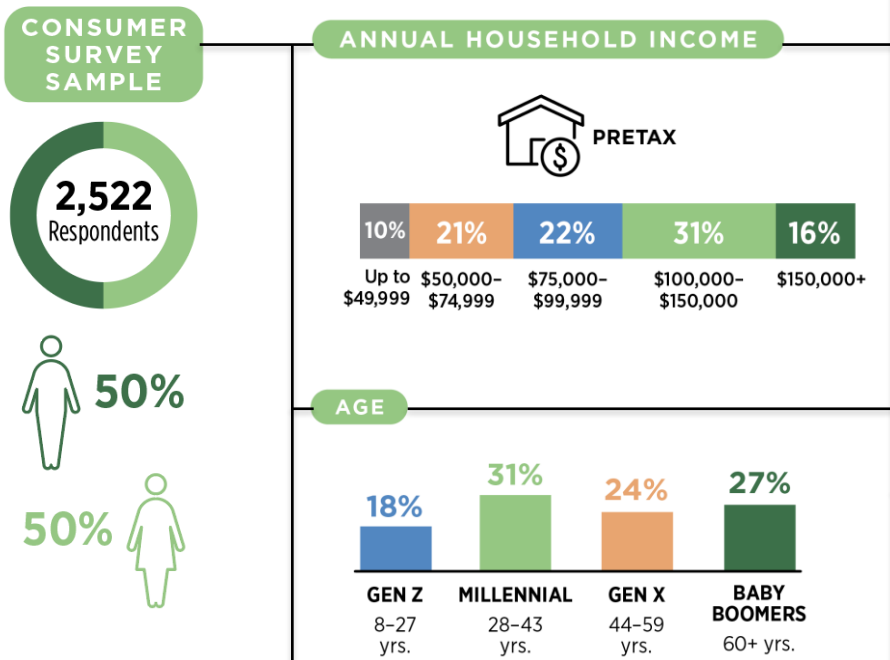


Consumer Perception of USDA Organic and Competing Label Claims



Survey Sample

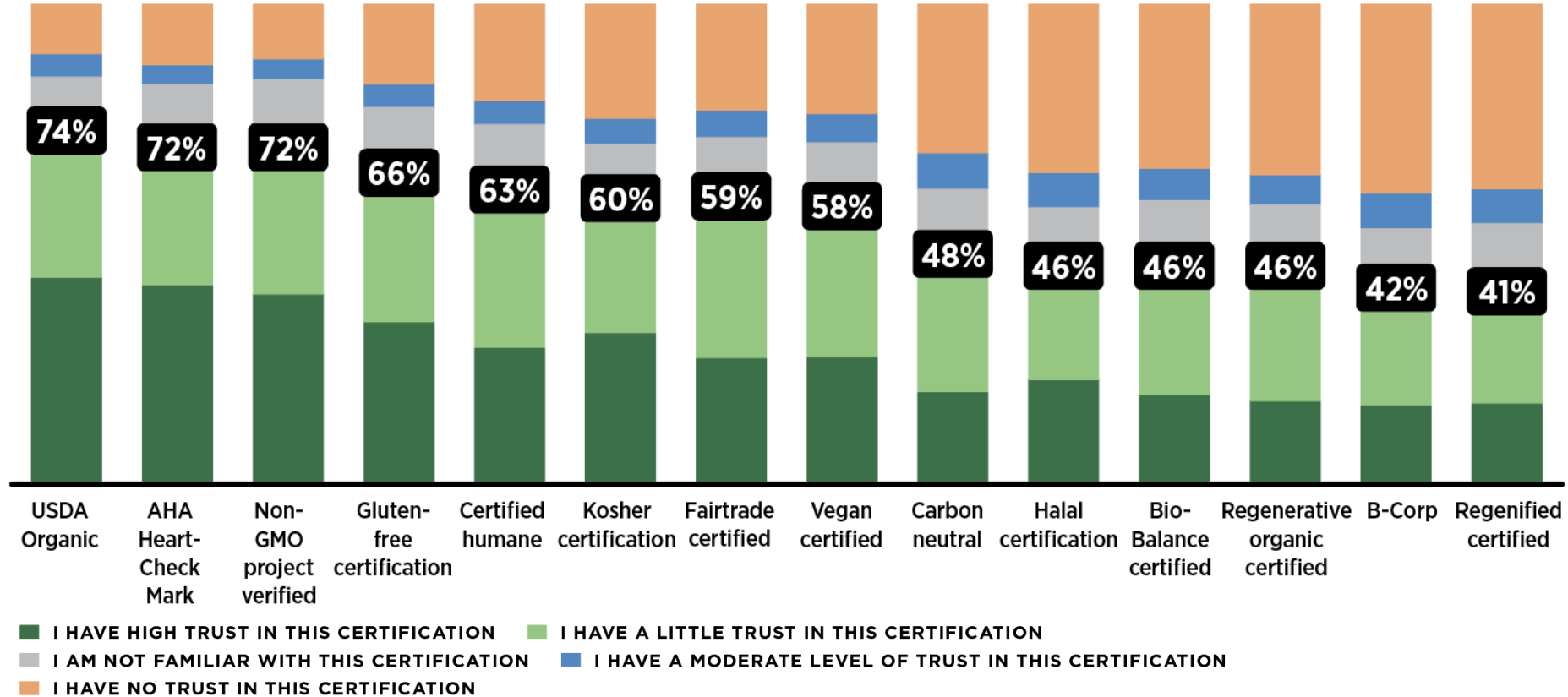
This year’s survey reached a representative sample of 2,522 respondents in the United States conducted in October 2024.





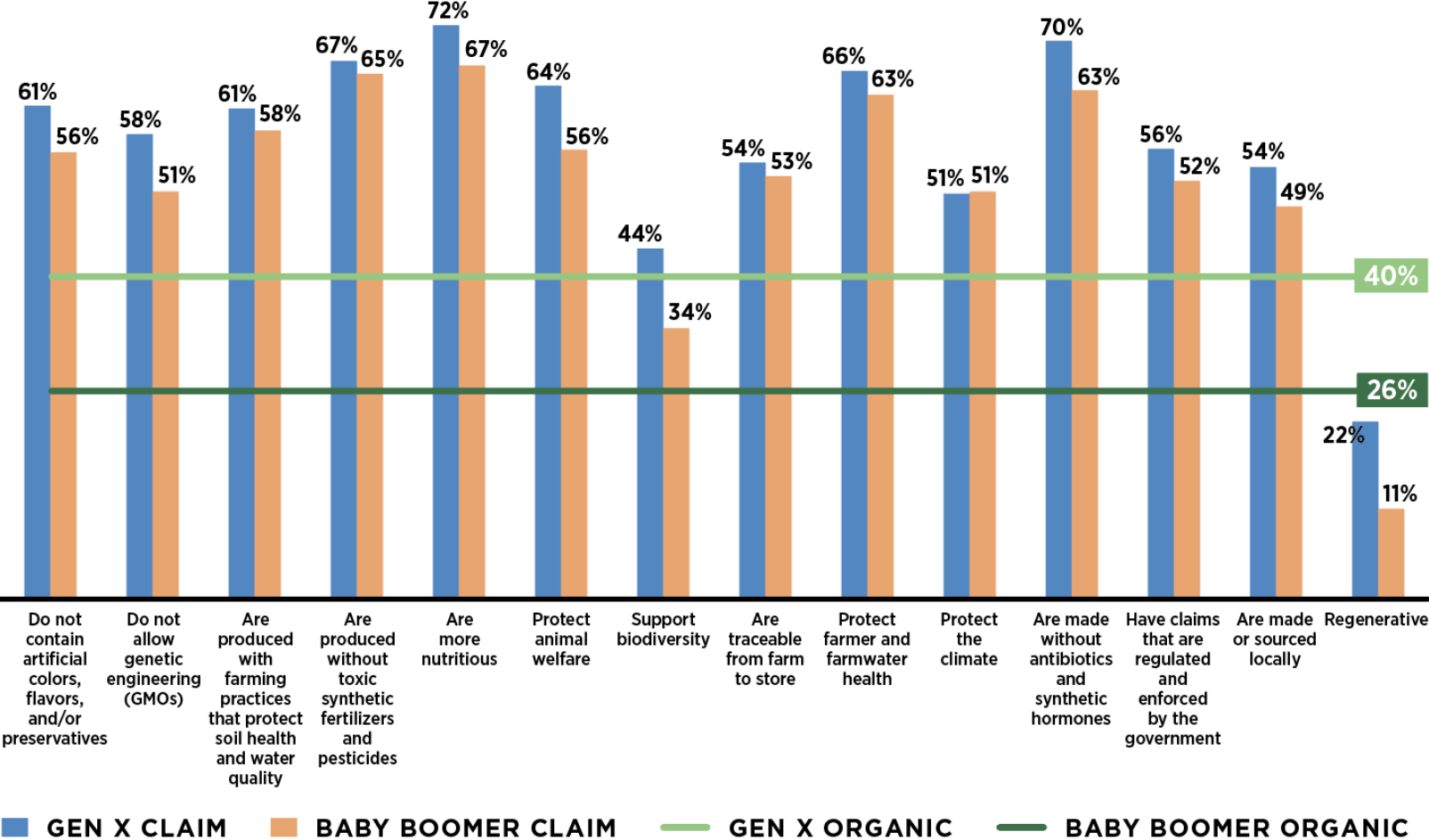
Trust in Labels and Certifications

Please select the statement that aligns the most with your opinions regarding each of the following food and beverage certifications.





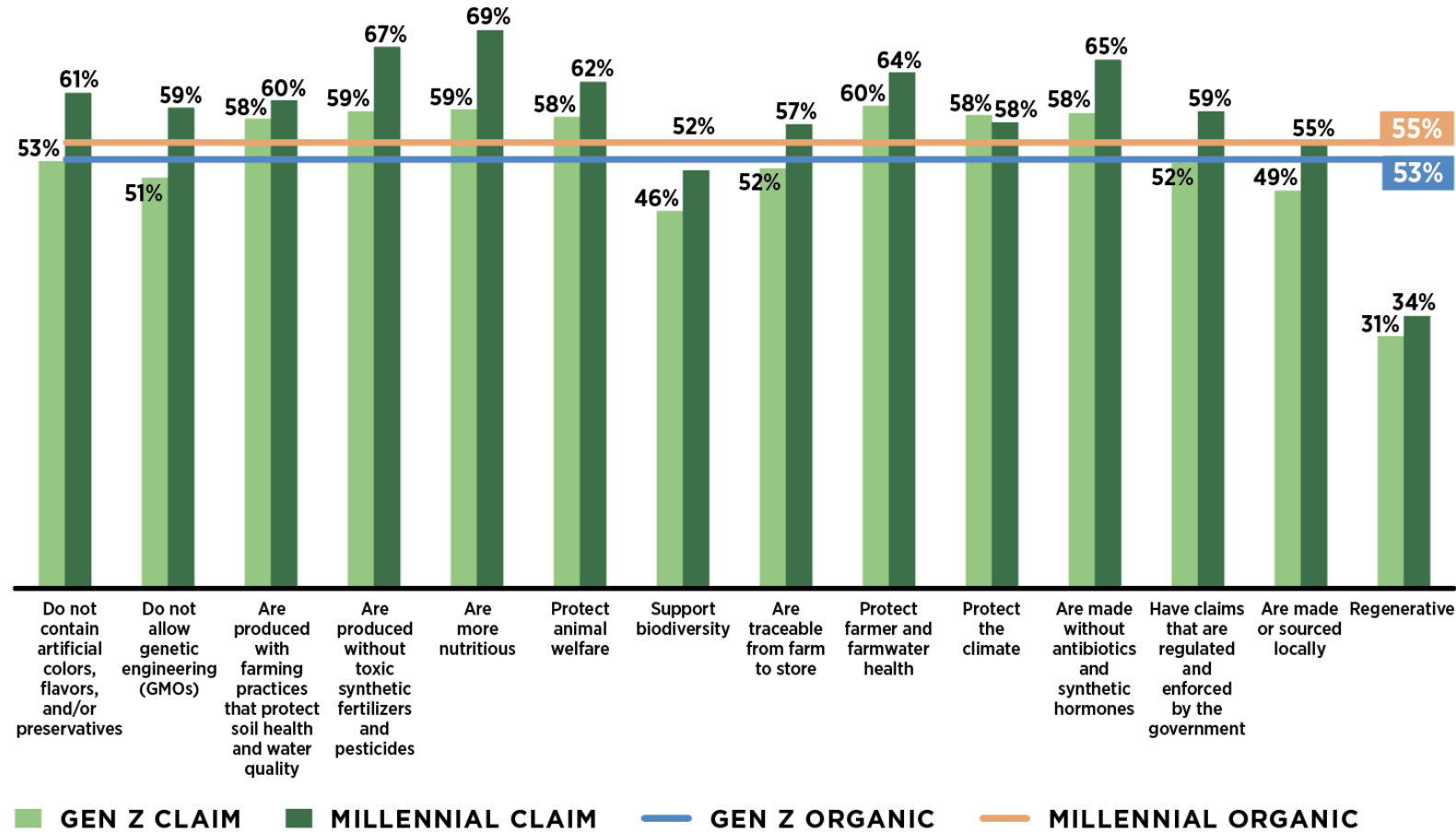
Older generations place less importance on organic vs individual claims despite high levels of trust.



Q. Which of these claims or attributes would be important to you when purchasing a food or beverage?



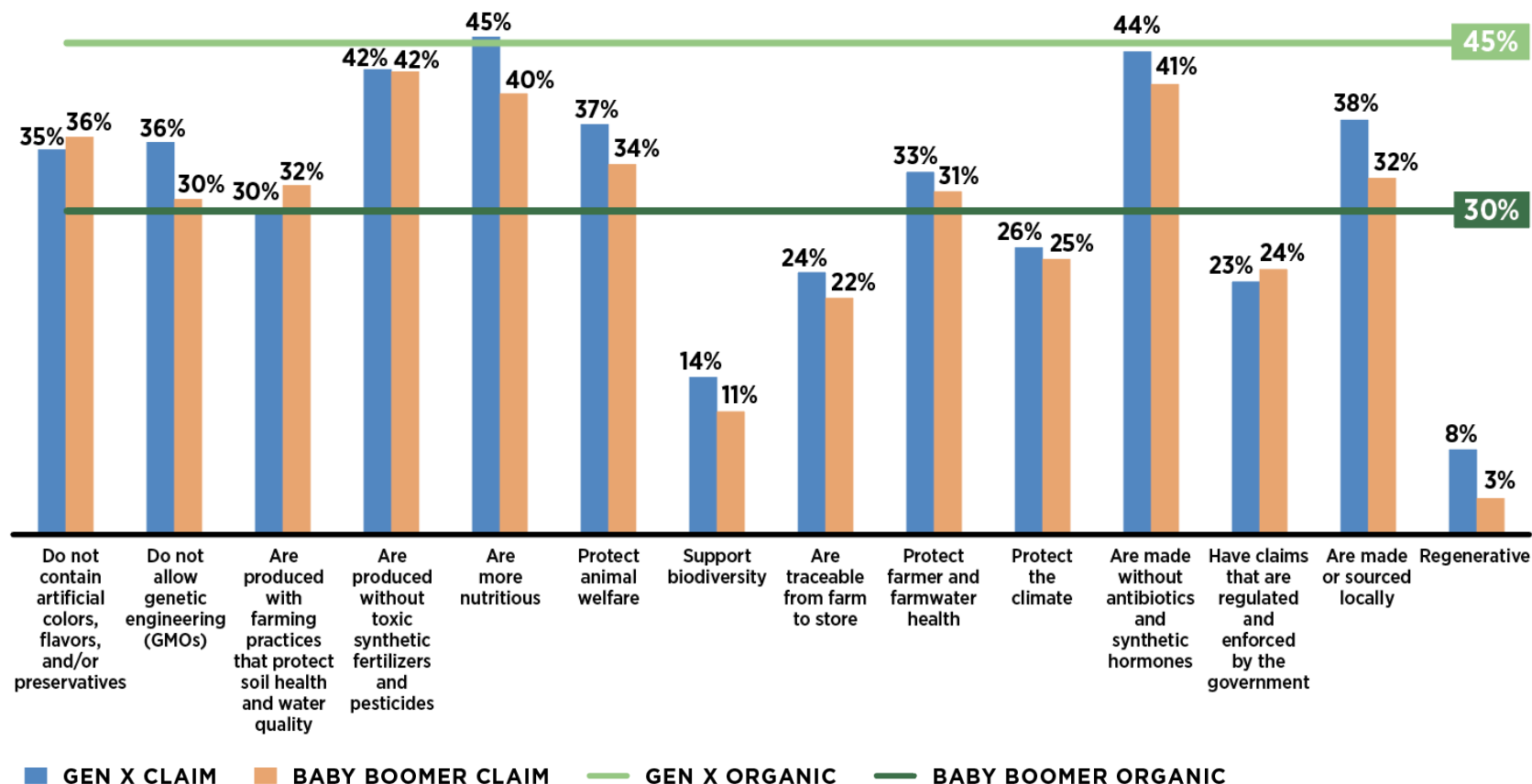
Younger generations place far more importance on organic: 13 to 29 percentage points higher than older generations.



Q. Which of these claims or attributes would be important to you when purchasing a food or beverage?



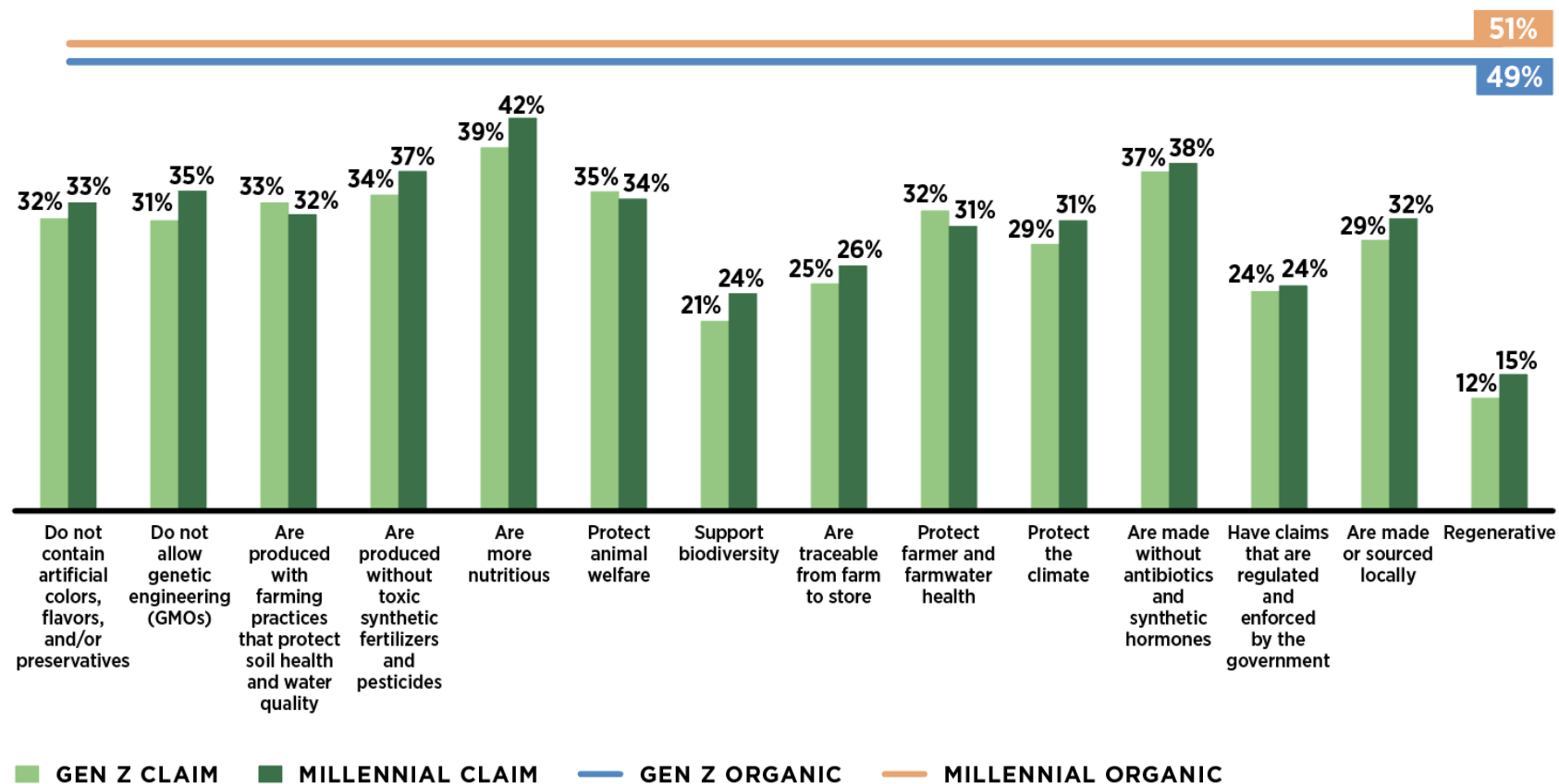
Gen X is willing to pay for organic at the same level of preferred claims, but Boomers only at average of claims.



Q. Please consider your food and beverage purchases and select the ones that you would be willing to pay more for.



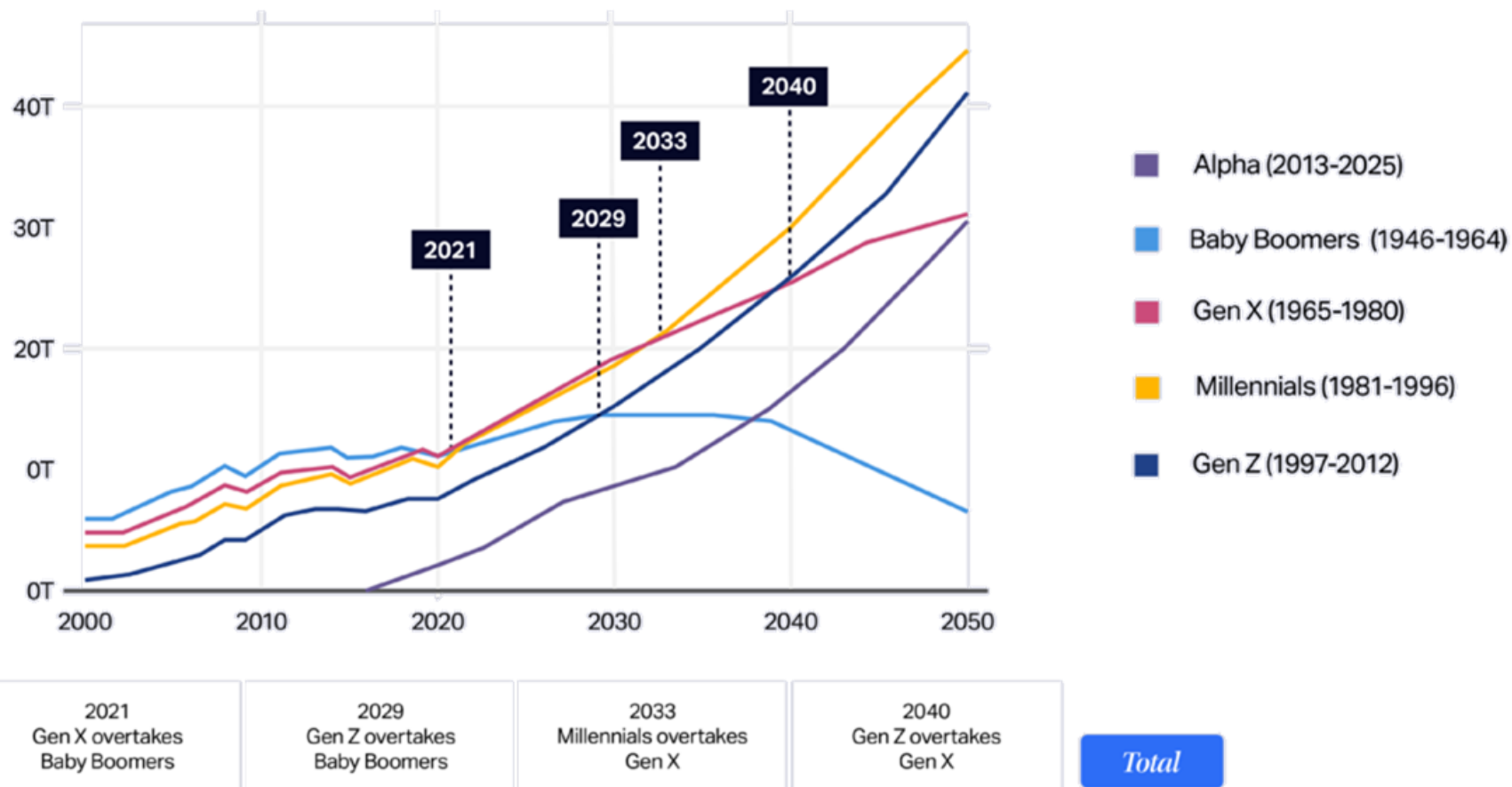
Younger generations are more willing to pay for organic than for other claims



Q. Please consider your food and beverage purchases and select the ones that you would be willing to pay more for.



Change in generational spending power are coming



Industry Resources



2025
CONSUMER PERCEPTION
of USDA Organic and Competing Label Claims
Generational Trust Levels for Certifications

High trust by generation for various certifications
Organic consistently has highest trust across all generations.

Certification	18-27 YEARS	28-43 YEARS	44-59 YEARS	60+ YEARS	GENERAL POPULATION
USDA Organic	43%	45%	45%	45%	43%
Non-GMO Project Verified	38%	40%	40%	40%	38%
Fairtrade certified	28%	32%	32%	32%	28%
Certified humane	25%	28%	28%	28%	25%
Regenerative organic certified	21%	24%	24%	24%	21%
Registered certified	17%	20%	20%	20%	17%

ota.com/ConsumerPerception

2025 Organic Market Report
Available Now

Total U.S. Organic Sales and Growth, 2015-2024

Year	Current Base Sales	Current Incremental Increase	Growth (%)	Projected Base Sales	Projected Incremental Increase
2015	40,000	5,000	12.5%	45,000	6,000
2016	42,000	5,500	13.1%	47,000	6,500
2017	44,000	6,000	13.6%	49,000	7,000
2018	46,000	6,500	14.1%	51,000	7,500
2019	48,000	7,000	14.6%	53,000	8,000
2020	50,000	7,500	15.0%	55,000	8,500
2021	52,000	8,000	15.4%	57,000	9,000
2022	54,000	8,500	15.9%	59,000	9,500
2023	56,000	9,000	16.1%	61,000	10,000
2024	58,000	9,500	16.4%	63,000	10,500

ota.com/OrganicMarketReport

ORGANIC WEEK 2025
*ROOTED IN 40 YEARS,
GROWING FOR THE FUTURE*
AN ORGANIC TRADE ASSOCIATION EVENT

September 15-17, 2025
Park Hyatt
Washington, D.C.

- Call for Proposals
- Tabletop Exhibits
- Sponsorship Opportunities
- Leadership Awards Nominations

<https://qrco.de/OrganicWeek>



ORGANIC TRADE ASSOCIATION

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