



This data brief summarizes findings from Organic Seed Alliance's (OSA) most recent *State of Organic Seed* report as they relate to the role of organic producers, including trends in organic seed sourcing, the enforcement of the organic seed regulation, and recommendations for encouraging the expansion of organic seed systems.

## Overview

Organic seed represents the first link in the organic supply chain, serving as the foundation of organic integrity from seed to plate. *State of Organic Seed* is an ongoing project that monitors organic seed systems in the U.S. Every five years, OSA releases this progress report and action plan for increasing the organic seed supply while fostering seed grower networks and policies that aim to decentralize power and ownership in seed systems.

OSA's research provides evidence that organic seed sourcing is increasing among smaller vegetable producers but that progress toward 100 percent organic seed usage in all crop types remains stagnant. In other words, our newest data shows no meaningful improvement in organic producers using more organic seed compared to five years ago. Certified organic growers are required to source organic seed when commercially available, but our findings show that most organic growers still plant non-organic seed for at least part (if not all) of their operations.

## Key findings

In 2019/2020, OSA conducted a national survey of certified organic producers in partnership with Organic Farming Research Foundation and Washington State University's Social and Economic Sciences Research Center. The seed-specific survey questions focused on organic producers' perspectives, experiences, and needs regarding organic seed availability. Our findings show the following:

- **Organic vegetable producers who grow fewer than 50 acres of crops report using more organic seed.** However, the biggest vegetable producers still use relatively little organic seed, and this has a big impact on overall acres planted to organic seed.
- **Organic seed sourcing in field crops, forage crops, and cover crops remains stagnant.** Approximately one-third of these growers report increasing the percentage of the organic seed they're planting, and roughly 40 percent of these producers report using about the same amount of organic seed compared to three years ago.

- **Producers report variety unavailability as their top reason for not sourcing organic seed.** Furthermore, certifiers have a hard time identifying what might be substituted as an equivalent variety per the organic seed regulation.
- **We saw an increase in organic producers reporting a processor/buyer requirement as a factor in not sourcing organic seed.** More than 30 percent of respondents identified this as a challenge, much higher than our last report.

**"Processors (buyers) demanding varieties in contract that are not available as organic continues to be the most significant roadblock to increasing use of organic seed in large row crop production."**

**- Organic Certifier**

- **Most organic producers source their seed directly from seed companies through websites, catalogs, and sales representatives.** A much smaller percentage source seed from their own production, stores, processors, buyers, or other farmers.
- **Most organic producers believe organic seed is important to the integrity of organic food and that varieties bred for organic production are important to the success of organic agriculture.** These findings match our last report and demonstrate an understanding among growers that breeding crops in organic systems is important to their success and to that of the broader organic industry.
- **Our data indicates that organic seed priorities pursued by researchers generally align with the demands of organic producers.** Organic producers identified vegetable and field crops in need of plant-breeding attention, and these are the most popular crop categories being researched.

**"We would like to start selling organic seed but are unclear on how to do this starting on a small scale."**

**- Organic Producer**

- **Fewer organic producers report saving seed for either on-farm use or to sell commercially compared to five years ago.** A quarter of survey respondents are using saved seed, and nearly half are producing seed for on-farm use or to sell commercially. Despite a significant decrease in producers reporting saving and/or producing commercial seed, 40 percent of respondents say they are interested in learning how to produce seed commercially. The lack of training, economic opportunity, and seed processing facilities were the top factors keeping farmers from growing organic seed commercially.

## Recommendations

A longer list of recommendations can be found in the conclusion of our report. We hope these recommendations will serve as an action plan for increasing the organic seed supply while fostering seed-grower networks and policies that aim to decentralize power and ownership in seed systems. The recommendations that stand out as most timely for organic producers include:

- The organic seed regulation should be strengthened and consistently enforced, regardless of farm size. Buyers/processors who contract with organic producers and require specific varieties should also be held accountable to the organic seed regulation.
- Public research investments in organic plant breeding and other organic seed research should continue to increase. Research agendas should be diversified to prioritize seed-producer challenges identified in the report to ensure that more organic producers have the skills and resources they need to produce organic seed.
- More organic seed trainings are needed to accommodate the interest, and address the challenges, among organic producers to ensure that organic seed production capacity continues to grow in the US.
- Improve existing databases, or develop a new database, that reliably includes all commercially available organic seed to support producers with their sourcing.

