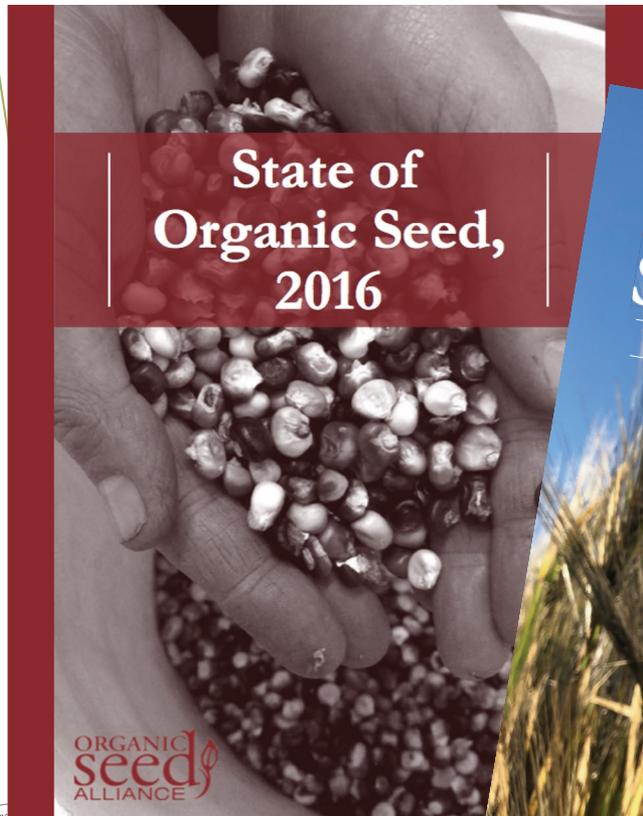
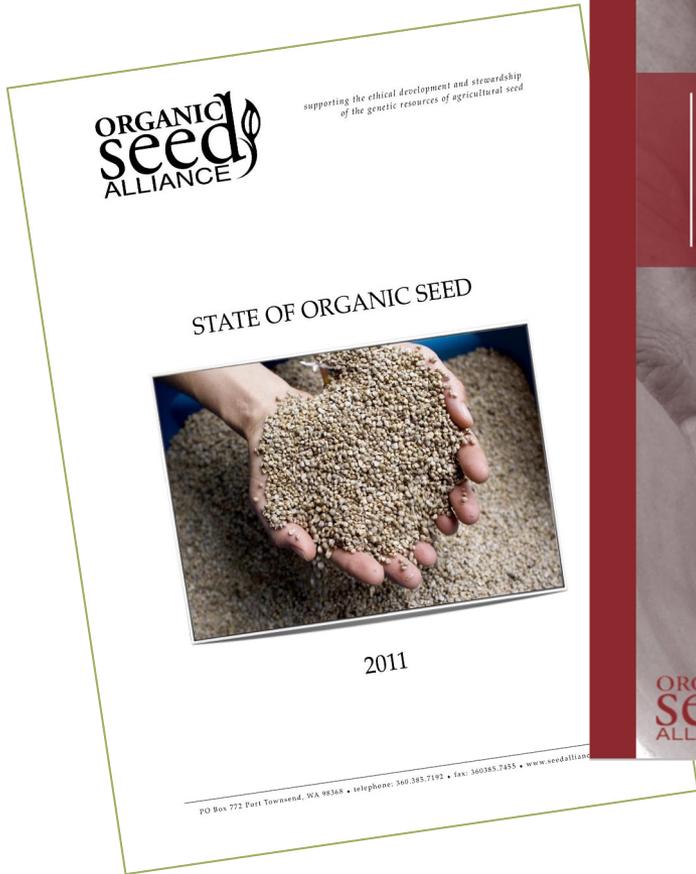


State of Organic Seed: A Five-Year Update

Kiki Hubbard
Pacific Northwest Vegetable Association
November 17, 2022

stateoforganicseed.org





State of Organic Seed

State of Organic Seed (SOS) is an ongoing project to monitor 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.

The benefits of expanding organic seed in the field and marketplace go beyond meeting a regulatory requirement

Climate | Growers | Environment | Human Health



Objectives of SOS

- Help organic producers meet the National Organic Program's organic seed requirement
- Identify urgent organic plant breeding and seed production research needs
- Promote policies and actions that increase the availability and diversity of organic seed in the market

Project methods

Targeted surveys:

- Organic producers (1,059)
- Organic seed producers/companies (127)
- Organic breeders/researchers (51)
- Organic certifiers (22)

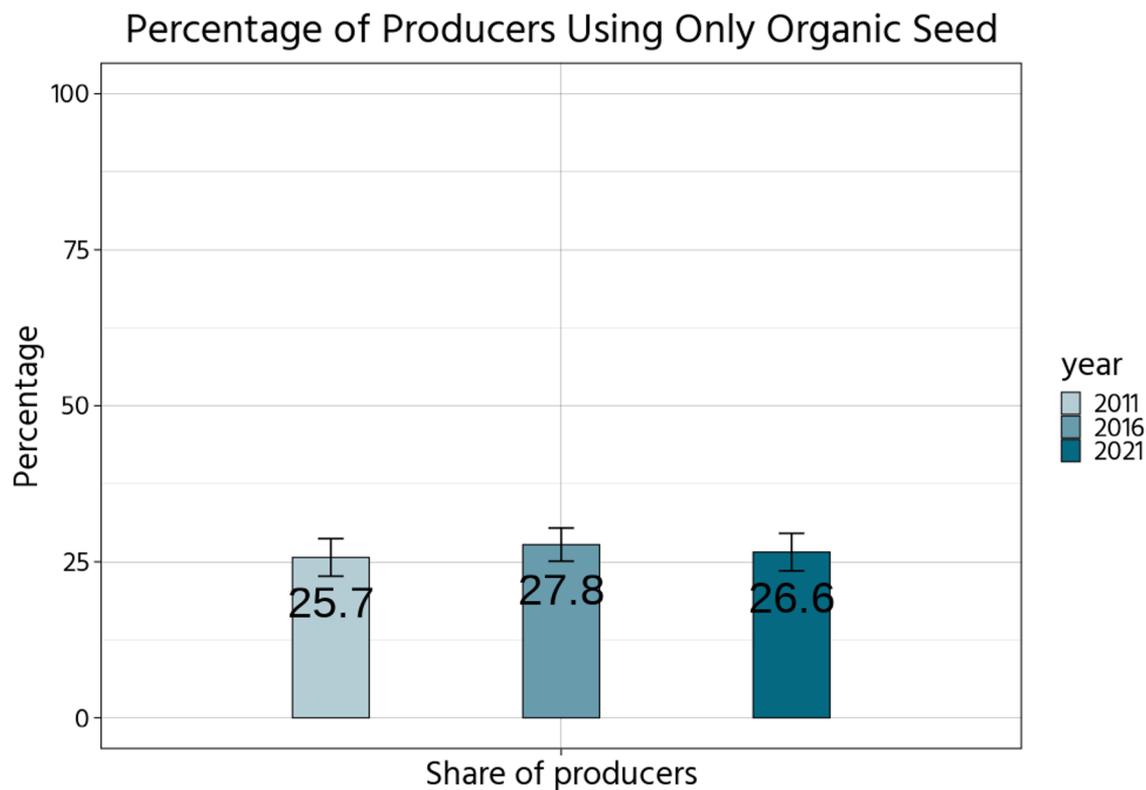
Other:

- Seed producer/company interviews (26)
- Organic research project funding
- Grower focus groups (100+)



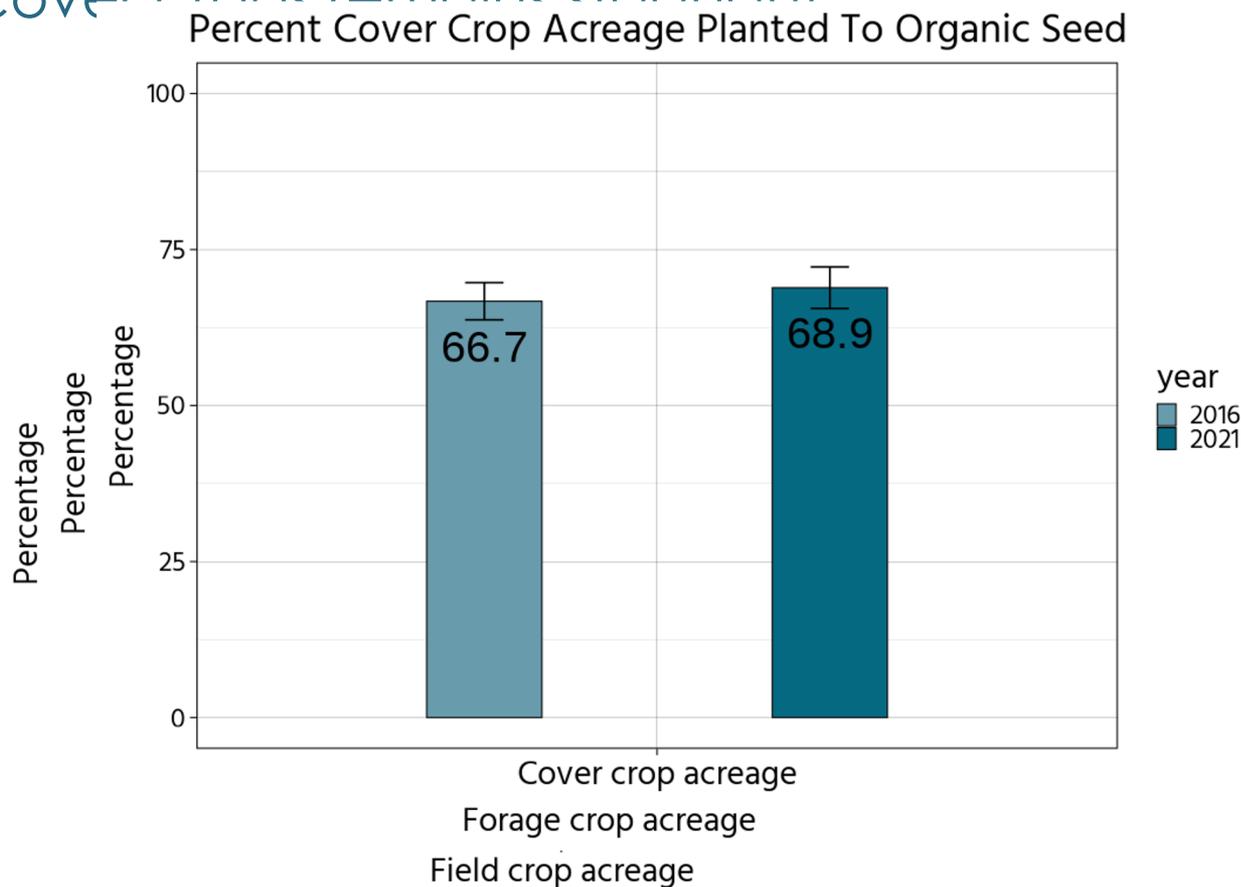
Key findings: Seed sourcing

Most organic producers still use non-organic seed for at least part (if not all) of their operation



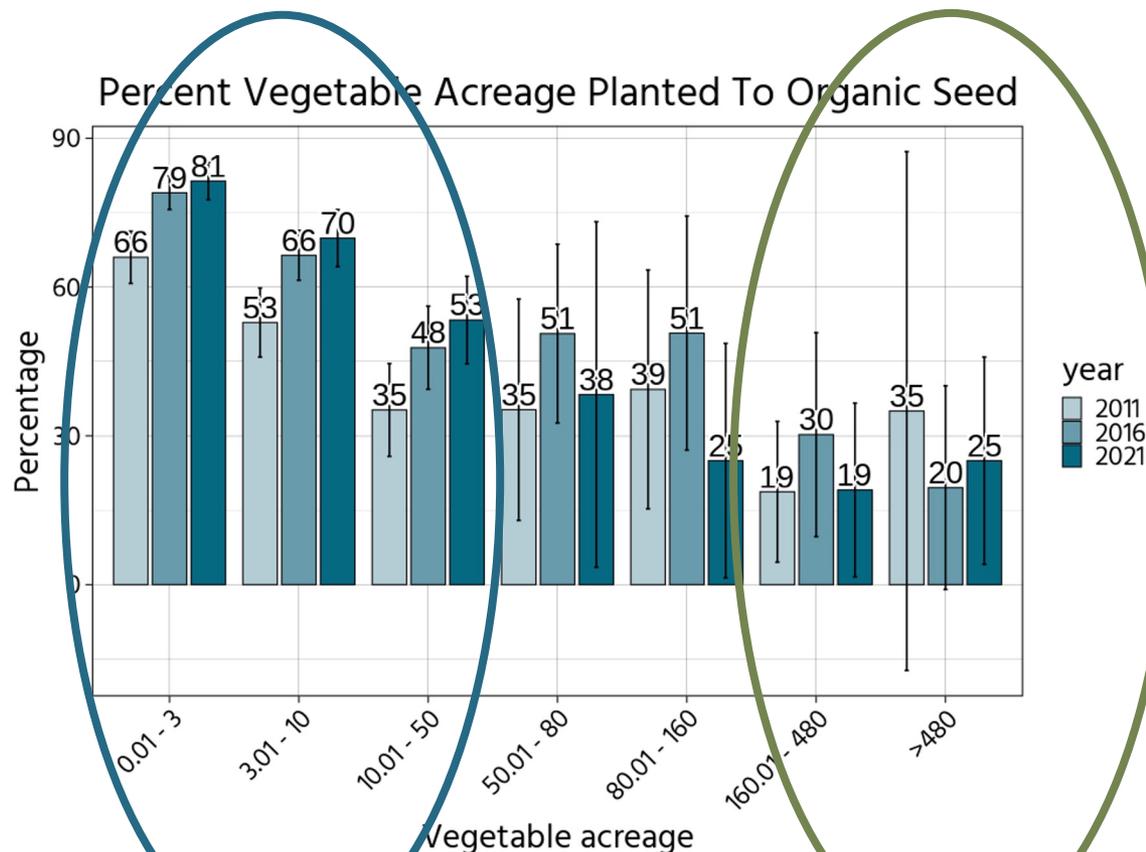
Key findings: Seed sourcing

Organic seed sourcing in field crops, forage crops, and cover crops remains stagnant



Key findings: Seed sourcing

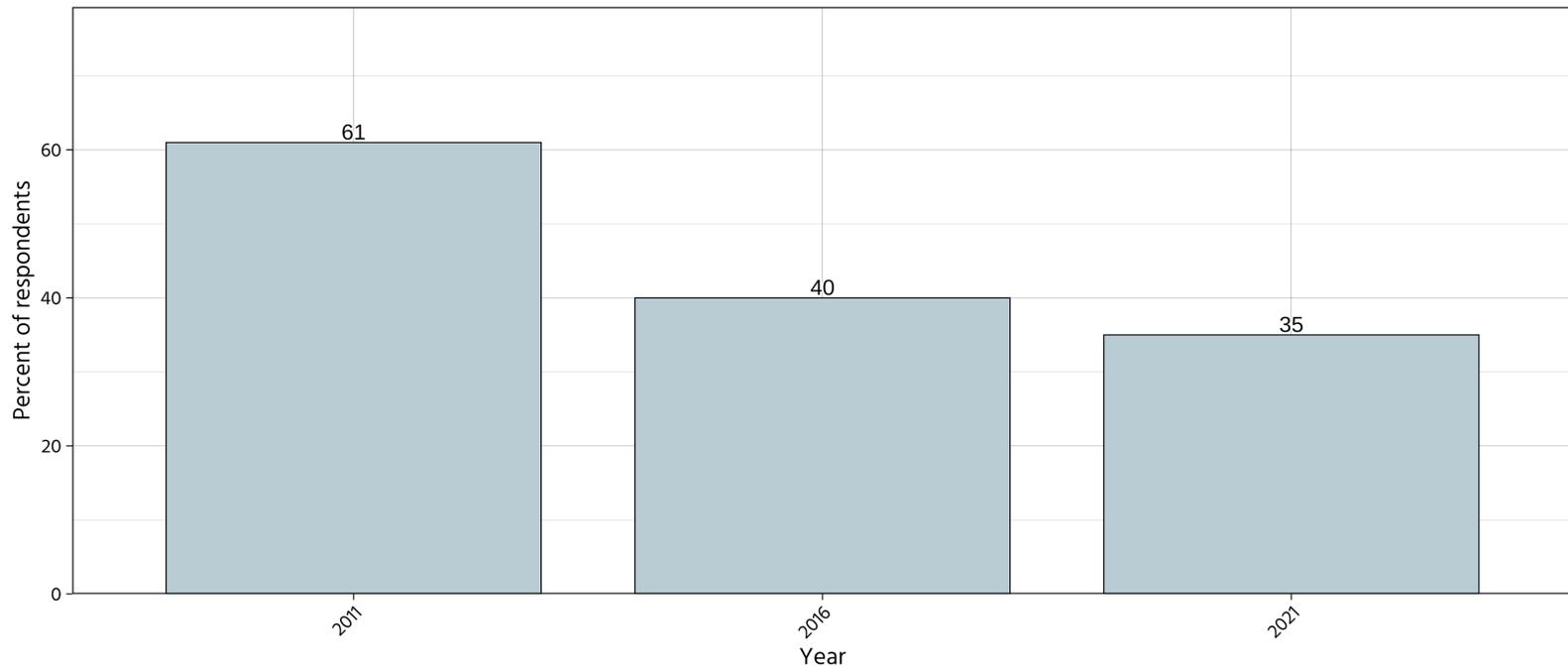
One bright spot: Vegetable producers who grow fewer than 50 acres of crops report using more organic seed



Key findings: Organic producer survey

Fewer producers are getting requests from certifiers to take great steps to source organic seed

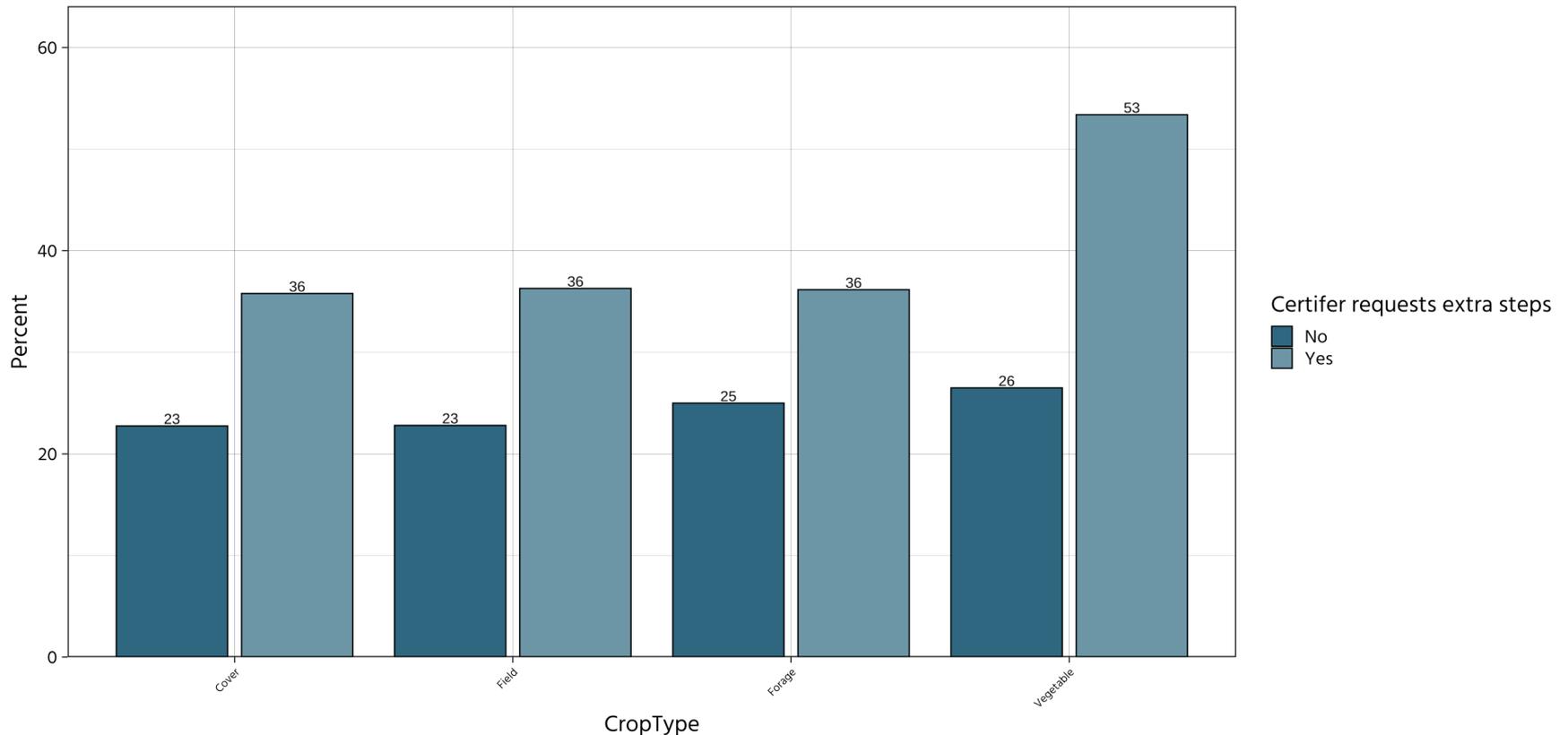
Figure 21. Over the last three years, certifier requested greater steps to source organic seed



Key findings: Organic producer survey

Our data suggests that certifier requests lead to more organic seed sourcing

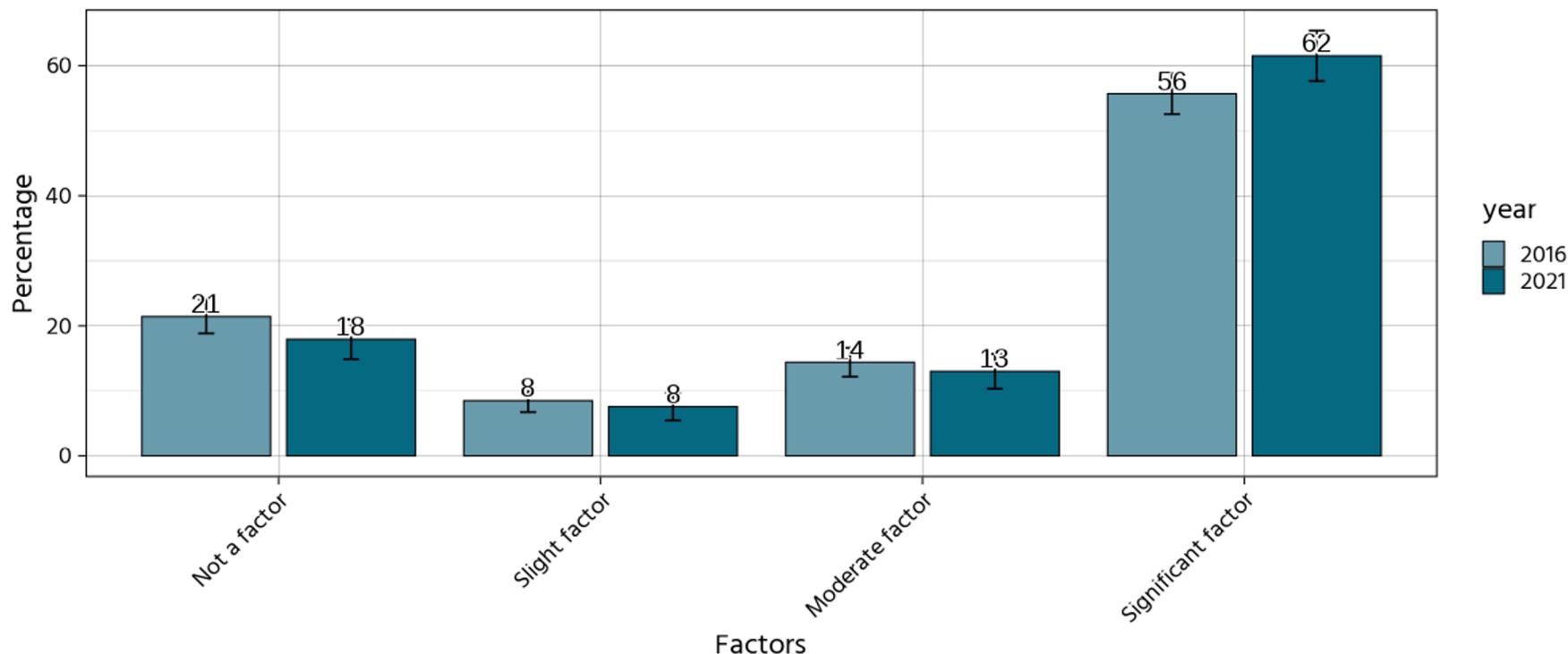
Figure 22. Increase in organic seed usage by certifier requests for extra sourcing steps



Key findings: Seed sourcing

Producers report variety unavailability as their top reason for not sourcing organic seed

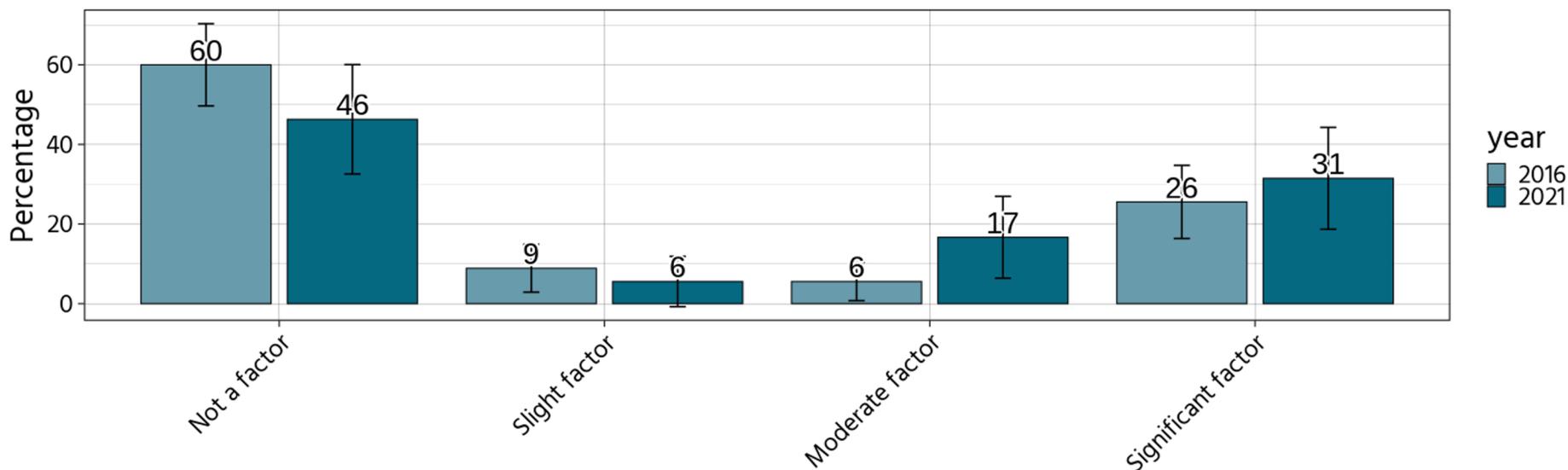
How much was the inavailability of specific varieties in organic seed a factor in your decision NOT to purchase organic seed?



Key findings: Seed sourcing

We saw an increase in larger vegetable producers reporting a processor/buyer requirement as a factor in not sourcing organic seed

How much was processor (buyer) requiring or supplying varieties that are not available organically a factor in your decision NOT to purchase organic seed?

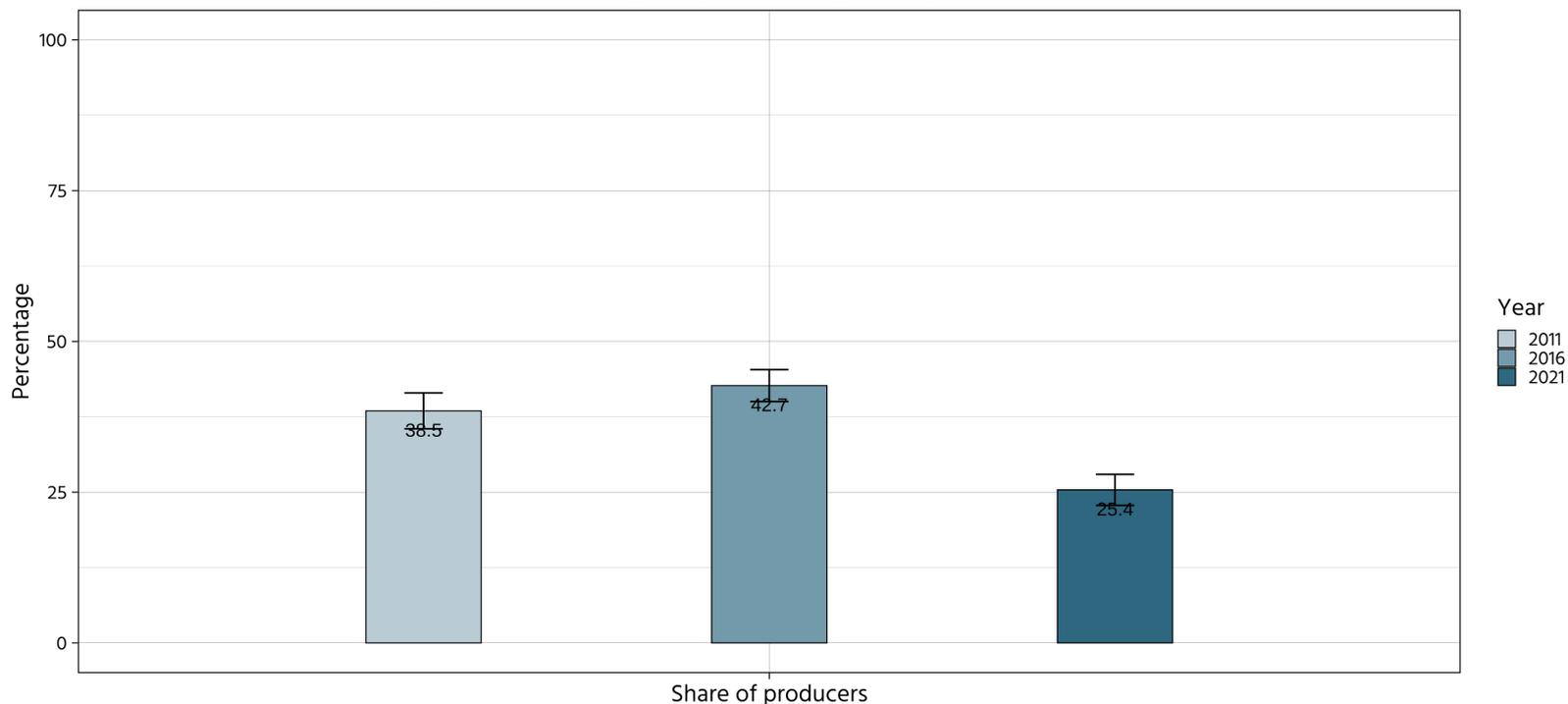


Factors for producers that grow vegetables and other crops with total acreages of: 50.01 - 80, 80.01 - 160, 160.01 - 480, >480

Key findings: Seed sourcing

Fewer organic farmers are saving/producing seed (25% compared to 42% in 2016), but 40% say they're interested in producing organic seed commercially

Figure 9. Percentage of producers growing their own seed



Key findings: Seed sourcing

Organic producers believe organic seed is important to the integrity of organic food (83%) and that varieties bred for organic production support their success and that of the organic industry (86%)



Key findings: Certifier survey

In 2020, 22 ACAs responded to OSA's survey. Collectively they represent 80%+ of certified organic farms

- Only **16%** of certifiers believe that organic producers go beyond three catalogs/sources to find organic seed

“ We need to constantly reinforce that the grower needs to do more work to locate or trial organic seed.”

ORGANIC CERTIFIER

- **52%:** more certifier/inspector trainings
- **80%:** more educational materials/outreach to producers
- **84%:** access to organic variety trial data
- Certifiers identified the need for a comprehensive database

Key findings: Research investments

USDA program and foundation funding lists were searched for public organic seed & breeding projects

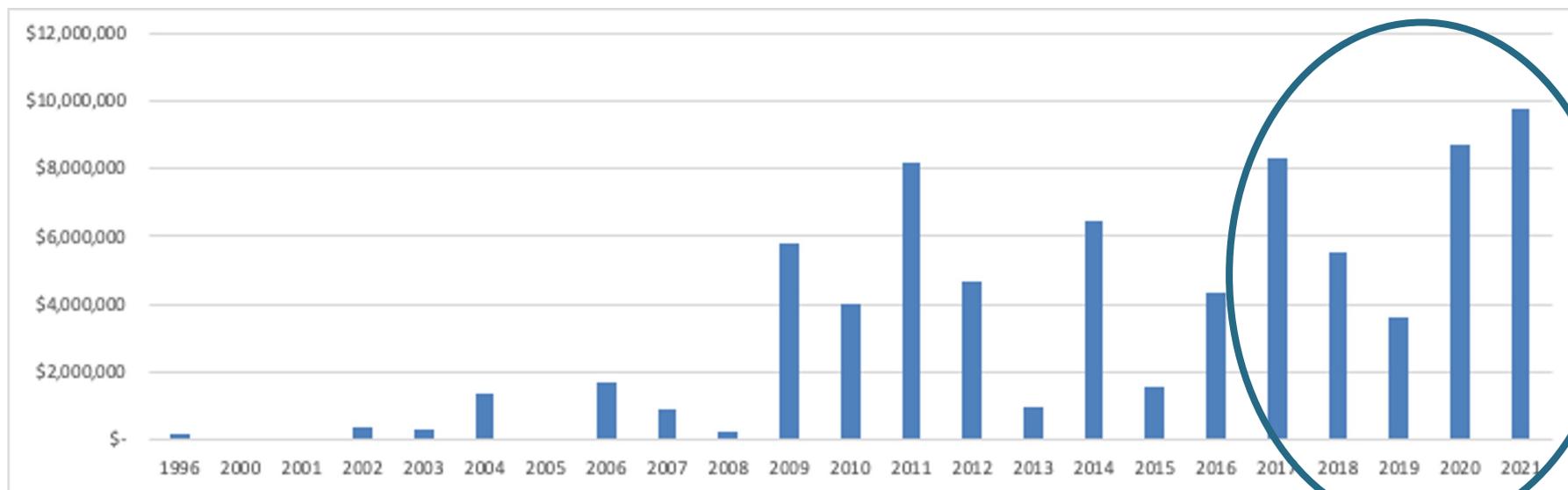
- 198 projects were identified
- Projects were categorized according to topic, region, funding source, and crop type



Key findings: Research investments

Public investments in organic plant breeding and other organic seed research totaled **\$39.8 million** in the last five years alone

Funding for public organic seed and breeding initiatives by year



Interactive data sets



Interactive Data Explorer

stateoforganicseed.org

Search data from surveys conducted with organic producers, organic seed producers/companies, organic breeders/researchers, organic research funding, and more



State of Organic Seed Data

Introduction Crop producers ▾ Seed producers ▾ Researchers ▾ Funding Seed Network

Welcome



Welcome to the State of Organic Seed interactive data explorer

State of Organic Seed is a project of Organic Seed Alliance that monitors the status of organic seed in the US and provides a roadmap for increasing the diversity, quality, and integrity of organic seed available. The State of Organic Seed Report, 2022, is available [here](#)

For most of this site, this sidebar will contain menus and buttons that will allow you to filter through the data and adjust the appearance of the figures.

The figures are calculated and created in real-time. Depending on the number of users connecting to the data explorer, there may be a slight delay in displaying some figures.

Takeaway

In 20 years, we have seen:

- tremendous growth in the organic seed supply
- increases in organic plant breeding/research funding
- more resources/trainings to support organic certifiers
- growing understanding of why organic seed is important

And yet our data over the course of these years show no meaningful improvement in organic seed sourcing in absence of regulatory changes.

Recommendations

- The organic seed regulation and guidance should be strengthened per the 2018 and 2019 recommendations of the National Organic Standards Board (NOSB)
- Organic buyers/processors who contract with organic producers to use specific varieties should help these producers meet the organic seed requirement
- A comprehensive organic seed database is still needed
- Ongoing investments in certifier, inspector, and producer trainings and outreach would also support more consistent enforcement of the organic seed regulation

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