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Challenges and Information Needs of Organic Growers and Retailers

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Challenges and Information Needs of Organic Growers and Retailers

Abstract

Growth in consumer interest in organically grown foods has opened new market opportunities for producers and retailers. This in turn implies an increased need for information specific to organic production, processing, marketing, and retail as growers and retailers increase their activities in this market. This article describes a research effort in east-central Kansas to assess the information needs in the organic sector. Data are drawn from focus groups and individual interviews with growers and retailers of organic foods. Implications for research and Extension programs, especially in the central Plains states, are discussed.

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Introduction

The production and sale of organic foods in the U.S. continues to expand rapidly. Certified organic acreage for major crops and pasture doubled between 1997 and 2001 (Greene & Dimitri, 2003) and doubled again between 2002 and 2005, bringing the total organic acreage in the U.S. to over 4.0 million acres by 2005 (ERS-USDA, 2007). Although organic foods comprise a small portion of total food sales, organic food sales have been growing by 17-21% annually over the past decade, with sales reaching \$13.8 billion in 2005 (OTA, 2006). Moreover, the global market for organic products has been growing rapidly, with global organic food and drink sales at about \$40 billion in 2006 (Organic Monitor, 2006). The economic future of organic production appears bright in many areas of the world, as analysts continue to anticipate market expansion.

Burgeoning consumer interest in organically grown foods has opened new market opportunities for producers and retailers. Of particular interest to retailers is the fact that more organic food is now purchased in conventional supermarkets than any other venue (Greene & Dimitri, 2003). Not only is there continued strong demand for fresh produce, but there is growth in demand for a range of organic products, including those based on grains, dairy, and meats. This growth provides an opportunity for farmers to innovate and expand production of a range of agricultural commodities. As farmers enter these markets, their need for information specific to organic production and marketing will increase accordingly. Likewise, retailers need specific market analysis as they increase their activities in this area.

This article describes a research effort in east-central Kansas to assess the information needs for organic production, processing, marketing, and retail in the region. Findings are intended to inform the development of research and Extension programs to address these needs. Broader implications for research and Extension programs, especially in the central Plains states, are discussed.

Methods

Two primary activities were conducted to achieve the research objectives: focus groups with growers and face-to-face interviews with retailers. Each of these activities is described below.

Focus Groups

Four focus groups were conducted with experienced growers. Three groups comprised established organic growers, and the fourth comprised growers interested in making the transition from conventional to organic production. The groups were formed in an attempt to achieve homogeneity of knowledge and experience across participants (Greenbaum, 1998), as there is concern that disparity in knowledge levels is likely to discourage those with less knowledge of a topic from full participation in the discussion (Krueger & Casey, 2000).

Homogeneity was achieved by identifying growers with approximately similar experience related to organic agriculture. Geographic diversity was sought among the participants; however, for practical reasons the geographic scope was limited to eastern-central Kansas. Also, the scope of the discussion was limited within each group by emphasizing participants engaged in producing similar commodities. In three of the groups (including the transitional grower group) the participants were engaged primarily in the production of grains, forage crops, and/or beef. The fourth group emphasized horticultural producers.

Average group size was between seven and eight participants, who were asked about the challenges they face and the information they perceive as necessary for organic production, processing, and marketing. It was determined that saturation was reached at the completion of four focus groups (i.e., a range of ideas had been established and no significantly new information was emerging), and thus further sessions were deemed unnecessary (Krueger & Casey, 2000).

Interviews

The other key source of data was interviews with retailers of organic foods. We sought variation in retailers by size, market orientation, and location. Interviews were obtained with large conventional retailers, large retailers with an emphasis on organics, and small/medium stores focused on organics. Key informants in a variety of leadership positions in the stores were interviewed. No attempt was made to obtain a random sample of interviewees; rather, the sample was seen as purposive (Altheide, 1996).

Eight in-depth, semi-structured interviews were conducted in the urban areas of Kansas City, Lawrence, Manhattan and Wichita. The intent of the interviews was to maximize variation in responses so as to gain as complete a view as possible of the informants' understanding of challenges and information needs with respect to retailing organic foods (Strauss, 1987). Informants were asked about their retail operations, about challenges and opportunities, and about information that would be helpful to them as an organic foods retailer.

Analysis

Analysis of the focus group and interview data followed the guidelines laid out by Krueger and Casey (2000) for focus group and Strauss (1987) for interviews. The basic strategy includes examining transcripts, categorizing responses, and analyzing themes that emerge in the data. Quotes that are used below are chosen as the best representations of the themes.

Focus Group Results

Challenges

Following an intentionally broad discussion on organic agriculture and growers' reasons for becoming organic, the focus groups were guided toward the more narrow transition question, which was phrased as follows:

What do you see as challenges for you as an organic grower?

From the discussion around this question, a listing of key challenges was recorded. After the discussion reached saturation regarding the main points, participants were asked to vote to prioritize the most important issues. Priority challenges perceived by growers in all the focus groups are summarized below, and can be categorized into (1) technical/production, (2) marketing, (3) education/awareness, and (4) practical models.

Technical/Production

The majority of challenges perceived by growers as priorities can be categorized as technical/production issues. An important component of production challenges is a perceived lack of available organic expertise, captured by one of the participants' comments, "Who you gonna call?" These and other production-related issues are discussed below.

Weed Control

Weed control is a priority challenge. Issues raised included mitigating weed problems through cropping systems design, the lack of products to deal with weed problems, and challenges associated with mechanical cultivation. Interestingly, pest/insect control emerged more in the

prospective/transition group than in the others. This may be a reflection of more experienced organic growers' ability to maintain pest populations in balance, resulting in insect pests being perceived as less of a challenge as compared to weeds.

Organic Expertise

The availability of expertise in organic production is another priority challenge. Participants agreed that when the need arises for technical assistance related to organic production, there are few people to call upon who have expertise relevant to their region. Extension, county agents, and local cooperatives have been unhelpful because these traditional sources of information have little knowledge of organic production, according to the participants. While general information about organic production is available on the Internet, it is often not specific to the region in terms of climate, soils, varieties, pest cycles, markets, and other factors. The following comment captures the general sentiment:

When I have a question, I go to the web . . . but the information I find is not specific to the region; it is from the west or east coast, but it is often not applicable because it is not specific to our pest cycles, our regional/local climates and soils. How do we access that information?

Another participant stated the problem in practical terms: "It would be helpful to have someone like *"Joe"* around who could be called upon for advice."

Ideas that emerged out of the discussions on expertise include: (1) a qualified organic Extension specialist who could "float" in the state, and (2) a centralized database to provide regionally specific information and technical assistance on organic production.

Time Management, Labor

Another category in production that received priority votes was time management and labor. The key issue is that organic production is labor intensive, and meeting the labor needs of an organic operation is challenging. Furthermore, growers expressed difficulty in paying reasonable wages, especially in small-scale operations.

Marketing

The two key challenges that growers articulated regarding marketing were organic certification and the ability of small growers to identify and enter organic markets.

Certification

The groups saw the organic certification process as bureaucratic and cumbersome, particularly for horticultural products as compared to grains. The documentation requirements associated with certification were perceived as heavy and thus as a potential barrier to entering organic production or maintaining certification. Other issues raised in relation to certification were fees and organic standards.

Small Growers and Marketing

The second challenge, in broad terms, has to do with the structure of agriculture, and the challenges faced by small-scale organic growers in that structure. Smaller organic growers face barriers related to a lack of marketing power in the context of a consolidating organic foods industry. Also, in many cases marketing and distribution networks are not as established as they are for conventional growers and federal programs are scarcer--all of which combine to make profitably venturing into organic agriculture challenging.

Education and Awareness

The key challenge that growers raised regarding education was the perceived lack of knowledge on the part of the public about the environmental, social, and health benefits of organic foods. That much of the mainstream public does not fully understand the unique benefits of organic agriculture, as compared to conventional, results in a lack of policy support, according to participants.

Practical Models

The final category of challenges has to do with practical information and models. The central question was how to partner more with the land-grant university in order to generate practical, applicable information helpful to organic farmers. The main issue seemed to be that the participants were searching for a way to engage with the local land-grant university in order to generate relevant information and perhaps develop a model for established and prospective organic farmers to follow (e.g., on-farm research, research partnerships, demonstration farms).

Information Needs

The transition question was followed by more narrow key questions, which were divided into three areas, phrased as follows:

If we think of the growing cycle as involving inputs, production, processing, and marketing, what kinds of information on (1) Inputs/production, (2) Processing, (3) Marketing . . . would be most helpful to you?

From the discussion around these questions a list of key information needs was recorded. Because the previous question had already allowed participants to discuss challenges, the discussion on information needs was relatively focused. The lists generated are summarized below.

Information Needs for Inputs/Production

Weed control:

- Weed problems (pigweed, bindweed, Johnson grass, velvet grass)
- Information on organic methods of weed control (e.g., biological controls)

Cropping system design:

- Cropping system design specific to the region
- Whole farm systems research and design
- Information on utilization of cover crops
- Information on high tunnel/greenhouse production

Soils:

- Soil health and testing specific to organic production
- Soil amendments: recommendations, availability, and bulk purchasing

Information Availability:

- Online lists of sources/dealers of organic inputs (e.g., information on products, costs, availability, distribution)
- Online lists of organic growers in Kansas
- Listserv on organics (question/answer format on problem solving, with the long term goal of fostering knowledge networks)
- Regionally specific Extension publications for organic agriculture

Information on other items:

- Alternative fuels and energy
- Plant breeding and seed history for organic production
- Organic methods of fly control in cattle (e.g., biopesticides)
- Innovative equipment for organic production (e.g., for cultivation)

Information Needs for Processing

Cleaning and Processing:

- Need for local/regional scale organic grain cleaning and processing
 - Develop low cost, high volume, portable grain cleaners
- Need for local/regional scale organic meat processing (beef, poultry, pork)
- Need for local/regional scale organic dairy processing
- Information on the economics of processing: Small scale, microenterprise, business planning and development

Storage:

- Information on managing moisture levels and pests in on-farm grain storage

Information Needs for Marketing

Develop new markets:

- Research/information to develop new markets
- Research/information on consumer trends
- Research/information on production costs and pricing
- Strategies for supply/demand
- Integrate organic foods into public institutions

Education:

- For growers: workshops/short courses for organic producers on marketing organic crops and certification issues
- For the public: information regarding the multiple benefits of organic agriculture (e.g., land stewardship, water and soil quality, community benefit, social benefit, health benefits)

Growers' Cooperative:

- Information on a growers' cooperative for: purchasing, equipment, marketing, insurance

General Information:

- Online source guide for marketing options
- Online directory of organic producers (regional and statewide), including what they produce
- Online directory of grocery stores that retail organic
- Information on certification groups and issues
- Land-grant university as a clearinghouse for information on organic agriculture

Retailer Interview Results

Retailers were varied by size, market orientation, and geography. In terms of size, the two categories are large and small/medium. Of the eight interviews, five can be considered large retailers, and three are small/medium. The two categories used to distinguish market orientation are "conventional" and "core-organic." Core-organic refers to retailers whose mission includes organic foods. Not all of the large stores are conventional (two are core-organic). In contrast, all of the small/medium stores interviewed can be considered core-organic.

Challenges

The challenges identified by retailers can be categorized into three main themes: (a) public perceptions and understanding of organic, (b) limited distribution networks, and (c) in-store challenges.

Public Perception

Core-organic retailers in particular noted a public perception, whether accurate or not, that organic foods are not affordable, especially for those on limited incomes. Some retailers offered arguments against this perception, yet conceded that "price keeps some away." Further, these retailers generally held the view that the public still lacks a full understanding of the environmental and health problems associated with the conventional food system and therefore does not understand the differences between conventional and organic. A final concern is that in a consolidating organic foods industry the meaning of "organic" will become diluted as large corporations use their influence to weaken organic standards.

Limited Distribution Networks

Distribution networks for organic produce are more limited in the Midwest relative to the coasts, occasionally causing availability and pricing challenges, according to retailers. For those who procure some organic foods locally, local wholesale and distribution networks are also prone to shortages and other disruptions.

In-Store Challenges

Conventional retailers noted a number of challenges related to the characteristics of organic produce, including consistency, appearance, shelf life, and differences in stocking and display

requirements.

Information Needs

Information on Consumers and Markets

There was generally agreement on this need. The conventional stores in particular were interested in studies of consumer demographics. Who is buying organics, who is not, and what are their characteristics by age, gender, income level, educational level, and residential zip code? Both conventional and core-organic stores were interested in the motivational reasons behind purchasing patterns, questions such as: What attracts consumers? What convinces them to make the initial organic purchase, and to continue purchasing organics? Why do consumers convert to organic foods? What premiums will the market bear? How do we retain customers?

Public Education About Organics

Core-organic retailers in particular felt that the public's knowledge of organics is often lacking, uneven, or misinformed. They articulated a need to define "organic" for the public and to educate the public about organic agriculture. Specific needs expressed include information bulletins on organic production and foods, especially their benefits, and comparisons of conventional and organic foods and production. As one informant phrased it,

People want to know if it's more nutritious. That's what I hear. They want a comparison when we're out giving talks. They want to know if an organic apple is more nutritious than a conventional apple. That's one I hear a lot. . . . And not just vitamins and minerals, but some of the vital [natural substances] that people are really interested in for cancer prevention.

In an interview with a core-organic retailer, it was suggested that to achieve the public education and outreach, Extension expertise in organic agriculture is needed: "I'd like to see Extension offices embrace organics because we interface with Extension . . . we need [their] buy in."

Limited Availability of Kansas Organic Products

A third theme was the limited availability of organic products from Kansas, especially packaged products, such as grain-based snacks, soymilk, and meats. Retailers noted that while packaged organic has been a rapid growth area--and accounts for a significant portion of sales--there are very few packaged organic products from Kansas available to retailers. One retailer noted,

We would like to do more. I only know of one company in Kansas who is making packaged organic products If we had packaged organic goods from Kansas, that would be a competitive edge because we would have two strong reasons to buy the product: it would be local and organic.

It was also noted that producers and wholesalers of organic foods may need help linking up with local/regional sources of organic products, properly packaging their products so that retailers can use them, and increasing awareness among retailers of product availability. On this last point, the concern is that even if a Kansas producer/wholesaler has a product, if it is not available through one of the large distributors, retailers may not be aware of it.

Implications for Research and Extension

The study reported here shows a need for research and Extension efforts in the organic agriculture and food sector that span the agrifood chain, from inputs through production, processing, manufacturing, distribution, retail and consumer patterns. These needs are being driven by growing demand globally for organic foods. The findings herein are based on a research project in east-central Kansas, but arguably apply more broadly.

One of the themes that emerged in the focus groups was the lack of information on organic production that is specific to local/regional climates, soils, and other conditions. We thought this might be particularly true for central Plains states, and polled the state SARE State Sustainable Agriculture Coordinators in the corridor of states from North Dakota to Texas (North/South Dakota, Nebraska, Kansas, Oklahoma and Texas). We asked them about their state's specialists and programs dedicated to organic production.

In short, there appears to be a dearth of programs dedicated to organic agriculture in this corridor of states, which corroborates the growers' sense in this study of the lack of regionally specific information. In the six states, none has a full-time faculty level Extension specialist dedicated to organic agriculture, though there are specialists in each state who devote partial time to organic work. Further, none of the states has a dedicated research program for organic production, though again there are partial appointments in at least three of the states that involve organic research. The University of Nebraska recently received a sizable grant for organic research over five years.

In terms of curriculum, none of the six states has a degree program or certificate program in organic agriculture. Two of the states have specific coursework in organic cropping systems. This

seems to be in contrast to other regions of the country, where programs of study in organic agriculture have been instituted (e.g., Washington, Colorado, and Michigan state universities).

Moreover, the lack of dedicated organic programs in this corridor of states stands out when juxtaposed with the apparent opportunities for organic production of commodities in which these states have distinctive strengths. In particular, these are important states for beef, wheat, sorghum, soybeans, and irrigated corn and cotton. Also, the bulk of some lesser crops are produced primarily in this region, such as sunflower, oats, and barley. Thus, there are significant opportunities for conversion to organic production as well as opportunities in a variety of specialty products (e.g., organic flour, oatmeal, cereals, etc.).

The study reported here was designed to identify challenges and assess the information needs for organic production, processing, marketing, and retail, as perceived by growers and retailers. The perceptions and opinions of Extension professionals on these issues were not addressed in this study. Of course, many in Extension are well aware of current trends in the organic sector, are knowledgeable about the issues raised in this article, and have been grappling with how to respond programmatically to meet future needs in this area.

It would be a worthy research effort to also study the perceptions of Extension professionals on these issues. The comparison of those results with the present study would be a useful beginning to identify differences in understanding, problems in communication, and potentially a productive way forward.

Clearly, the study raises politically charged questions that are beyond the scope of this article. It also suggests a need and an opportunity for Extension and the organic grower/retailer community to engage in an open dialogue in order to compare and challenge each other's perceptions on these issues and work collaboratively to develop an effective programmatic approach to addressing this dynamic sector.

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