DEPARTMENT OF AGRICULTURE
CTGrown.gov

Report of Findings

2025 Connecticut Organic Market Study

Table of Contents

Project Overview

Research Objectives

- GreatBlue Research was commissioned by Miranda Creative and the Connecticut Department of Agriculture (hereinafter "CT DoAG") to conduct market research to understand the needs, experiences, and behaviors of both producers and consumers involved in the purchasing, promotion, and production of organic and CT Grown agricultural products.

- The primary goal of this research study was to identify perceptions, barriers, and opportunities related to the marketing, distribution, and consumer awareness of organic and CT Grown products across the full agricultural supply chain in Connecticut.

- The outcome of this research will enable Miranda Creative and CT DoAG to a) more clearly understand the motivations and challenges faced by both producers and consumers, b) act on near-term improvements to increase engagement and visibility, and c) develop a targeted strategic roadmap to elevate the presence, accessibility, and success of CT Grown USDA-certified organic products throughout the state.

Areas of Investigation

The 2025 Connecticut Organic Market Study leveraged a digital research methodology to address the following areas of investigation:

- Awareness, familiarity, and perceptions of CT Grown and USDA-certified organic products among both producers and consumers
- Motivations and barriers related to producing, selling, sourcing, or purchasing CT Grown and organic products
- Marketing practices, communication strategies, and promotional support needs across the supply chain
- Challenges related to certification processes, pricing, buyer connections, availability, and logistics
- Consumer purchasing behavior, preferences, and willingness to pay for CT Grown and organic products
- Opportunities to strengthen the visibility, accessibility, and effectiveness of the CT Grown and organic supply chains
- Levels of interest in and recommendations for future CT DoAG-led education, outreach, and support initiatives
- Demographic and firmographic questions

Key Study Findings

Consumers

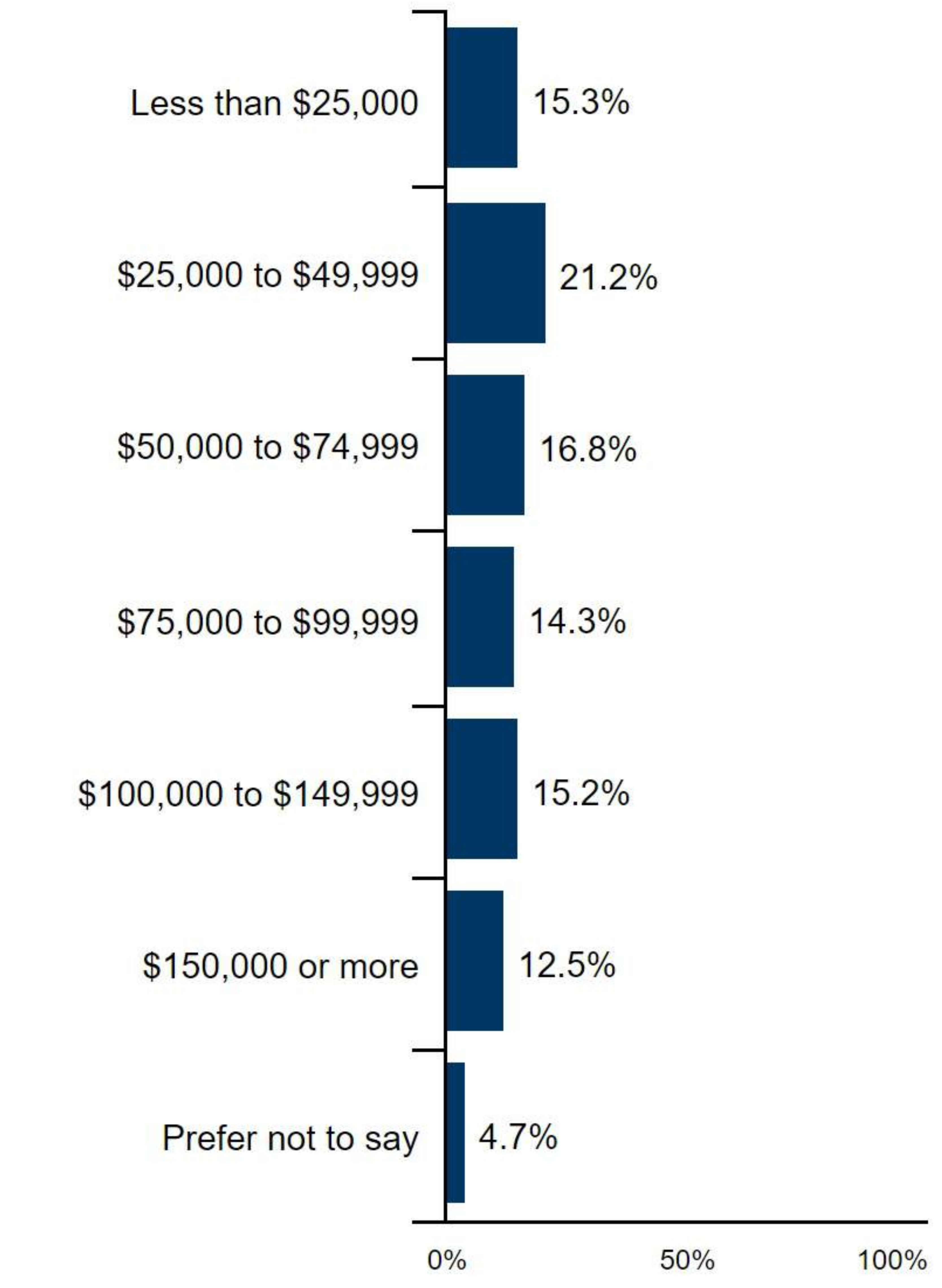
Research Methodology Snapshot | Consumers

Methodology Digital	**No. of Completes** 600	**No. of Questions** 37*	**Incentive** None	**Sample** CT DoAg Organic Consumer Email Lists & Panel
Target Organic Consumers in Connecticut	**Quality Assurance** Dual-level**	**Margin of Error** +/- 3.85%	**Confidence Level** 95%	**Research Dates** May 29 - June 9, 2025

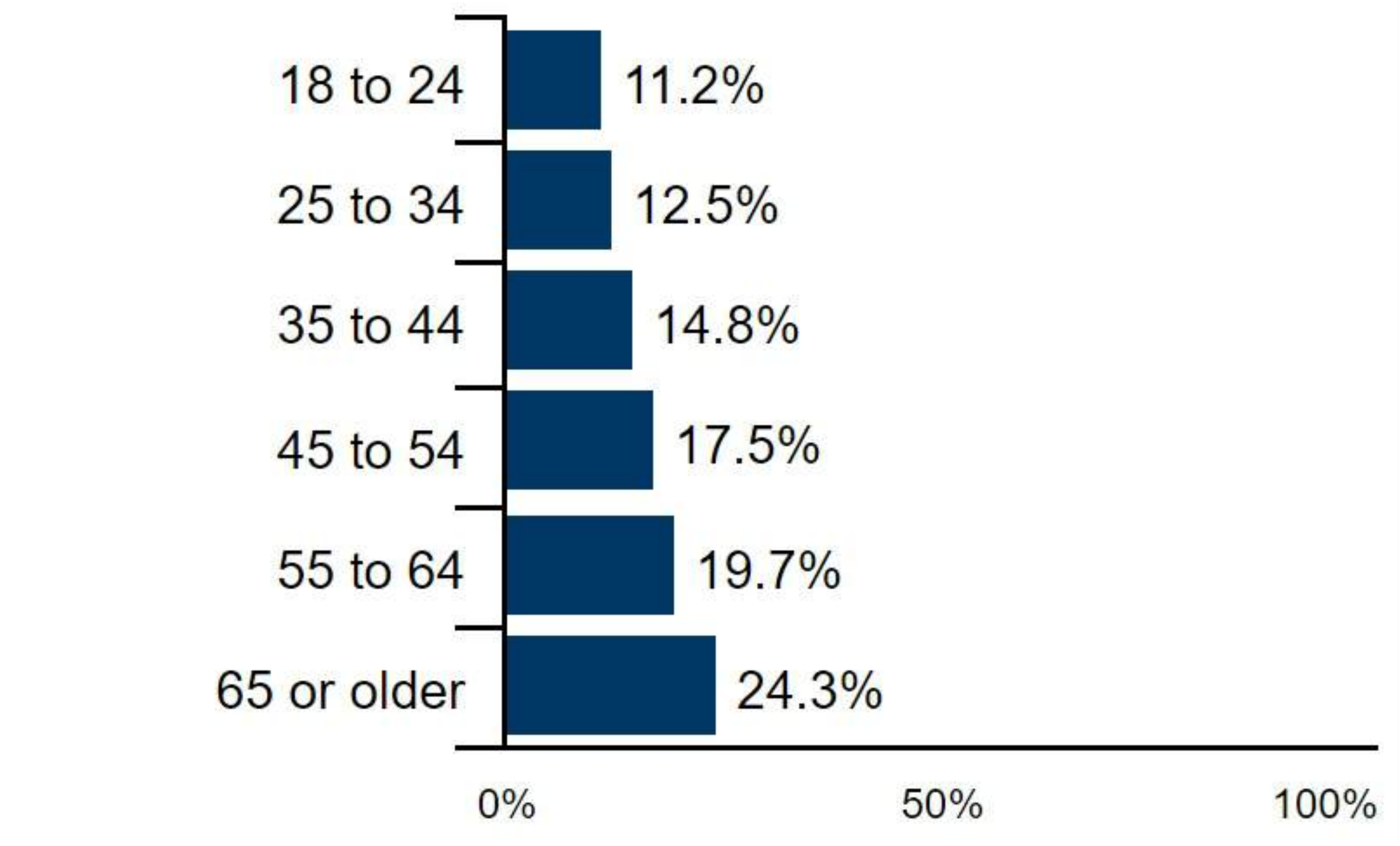
* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.
** Data quality personnel, in addition to a computer-aided interviewing platform, ensure the integrity of the data is accurate.

Respondent Profile | Consumer Demographics

Household Income



Age



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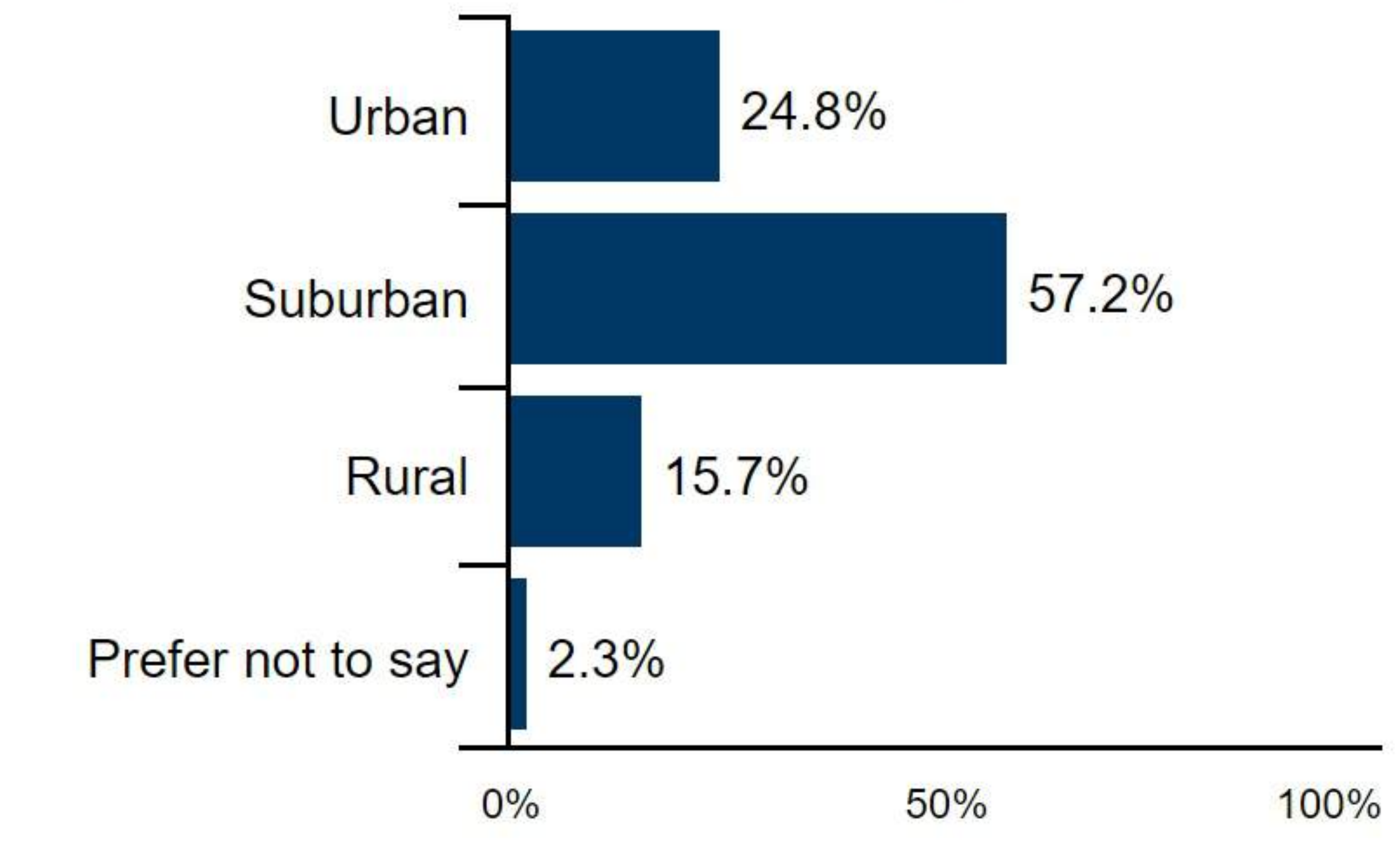
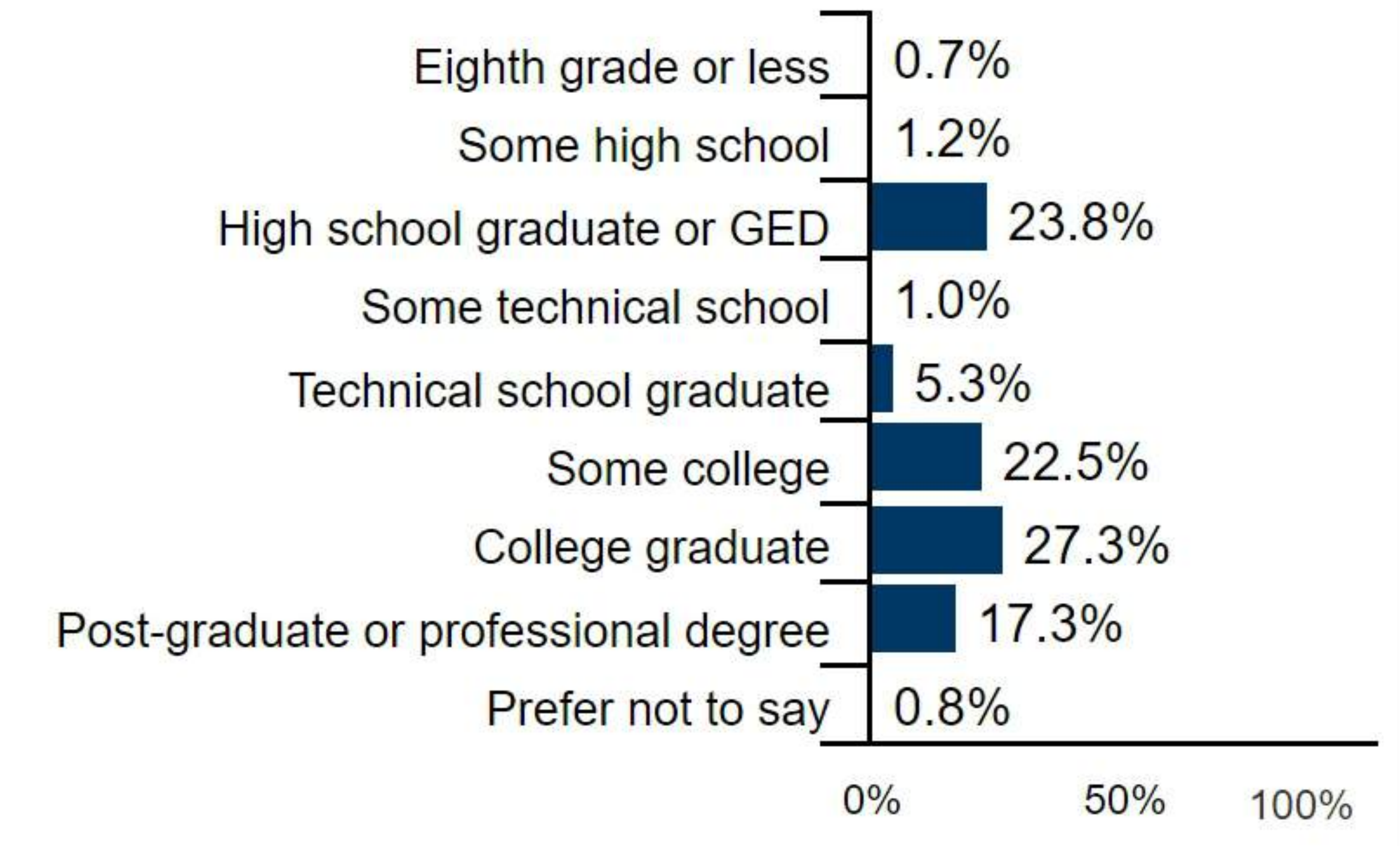
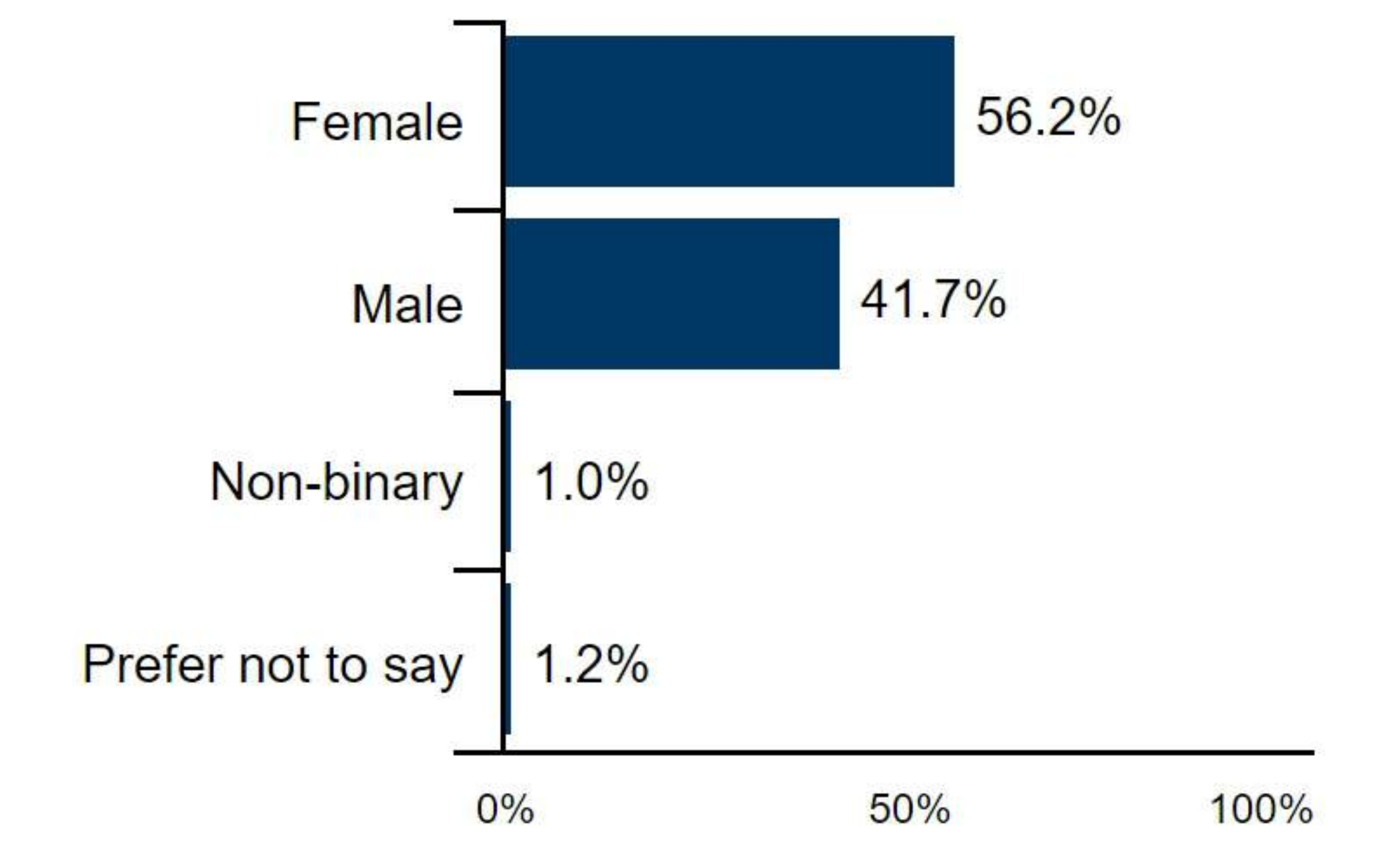


Education



Gender



Key Study Findings - Consumers

Awareness, Values & Purchasing Behavior

- Over three-quarters of respondents (78.5%) were familiar with organic food products, with nearly one-half (47.8%) being "somewhat familiar." Environmental sustainability was "important" to a similar share (79.8%) of respondents.
  - Familiarity was higher among those earning $100K+ (86.7%) compared to lower-income respondents (74.1%), while importance was higher among 18-44 year old respondents (84.4%) compared to those 45 or older (76.1%).
- Price (60.7%) was the most important purchase factor, followed by "taste or freshness" (59.7%) and "product quality" (56.7%); only 18.5% prioritized organic certification.
- One-third purchase organic products "occasionally" (31.5%) or "regularly" (30.7%); associating organic products with "no synthetic pesticides/fertilizers" (62.3%) and being "healthier" (57.8%).

CT Grown Organic Awareness & Preferences

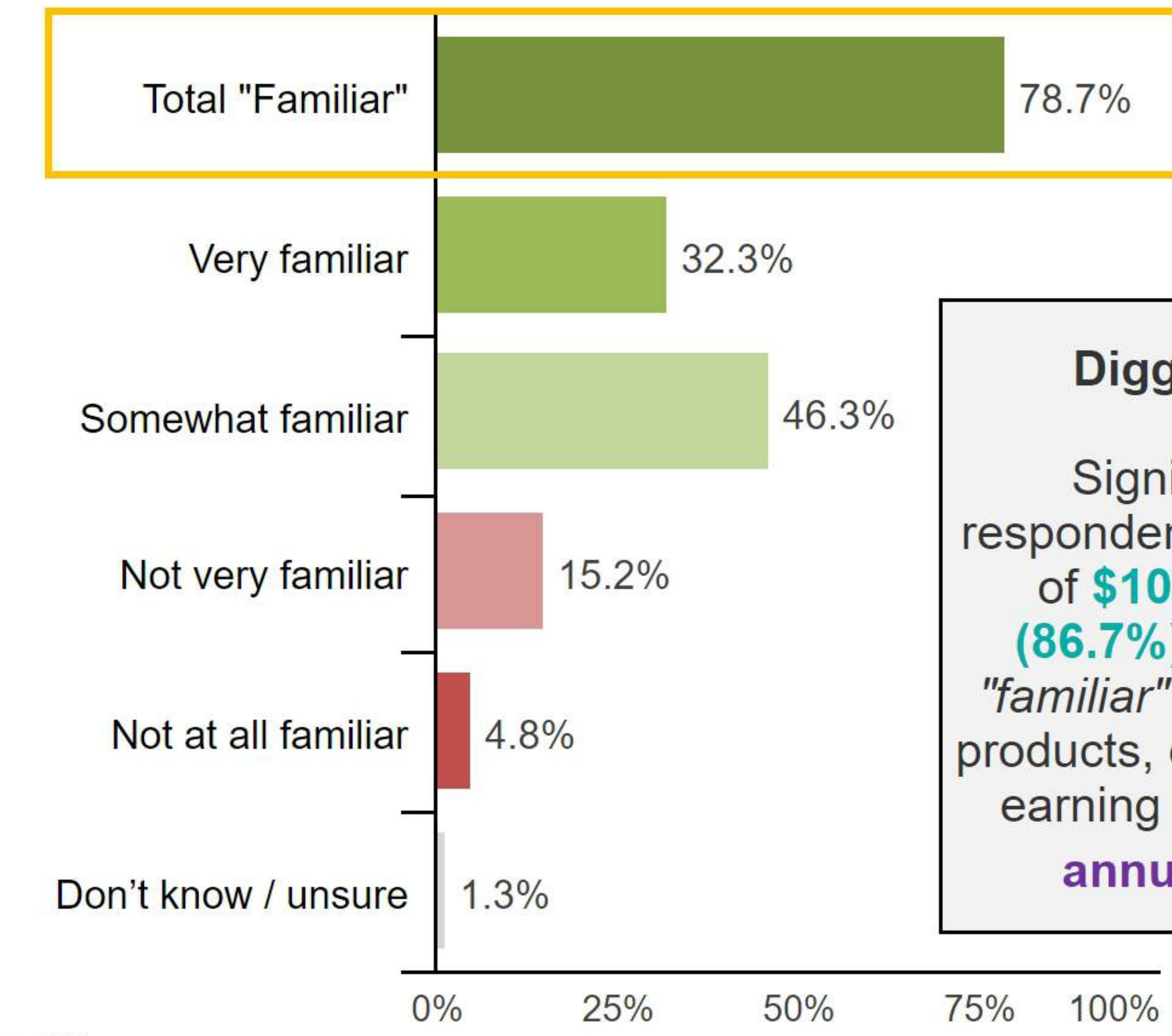
- Nearly two-thirds (64.3%) were familiar with USDA organic certification, and just over one-half (52.7%) were aware of CT Grown USDA-certified organic products.
- CT Grown Organic promotions were most often seen via "CT Grown/government campaigns" (35.1%) and "social media" (30.4%), with younger adults more likely to encounter them through social media compared to those 45+ (43.4% vs. 22.2%).
- Top information needs included "where to buy" (46.2%), "how to identify" (45.8%), and "which products are certified" (42.5%).
- Among current CT Grown Organic buyers, one-half shop at farmers' markets (50.9%) and two-fifths at natural or organic stores (44.2%). One-quarter of respondents (25.2%) increased purchasing due to healthier lifestyle goals (27.5%).

Access, Messaging & Consumer Needs

- Nearly one-half rated CT Grown Organic product quality as "good" (47.4%), and 38.5% rated it "excellent." However, willingness to pay more was moderate (41.3% somewhat willing, 25.2% not really willing).
- Price was the top factor influencing choice between organic products (64.3%), followed by certification seal (34.2%) and store location (33.8%).
- Among non-buyers, lack of awareness (42.6%) and not knowing where to find products (36.5%) were the top barriers; however, 58.9% expressed interest if more access or information were provided.
- Buyers said they'd be more likely to purchase with "more affordable pricing" (58.3%) and better availability at "regular grocery stores" (48.8%). Grocery store chains (59.5%) and farmers' markets (43.3%) were the top preferred outlets.
- Most respondents hadn't seen CT Grown Organic promotions (56.8%), but those who had reported seeing them at "community events or farmers markets" (38.1%) and "in-store displays" (34.0%).
- Messaging influenced 43.5% of respondents' purchasing decisions "a great deal," and another 41.5% "somewhat." In-store signage (47.8%), social media (32.2%), and community events (31.8%) were preferred future ad channels.
  - Messaging had the strongest impact on Non-Organic Consumers (66.7%) compared to Committed (51.1%) and Occasional (25.5%) Organic Consumers.

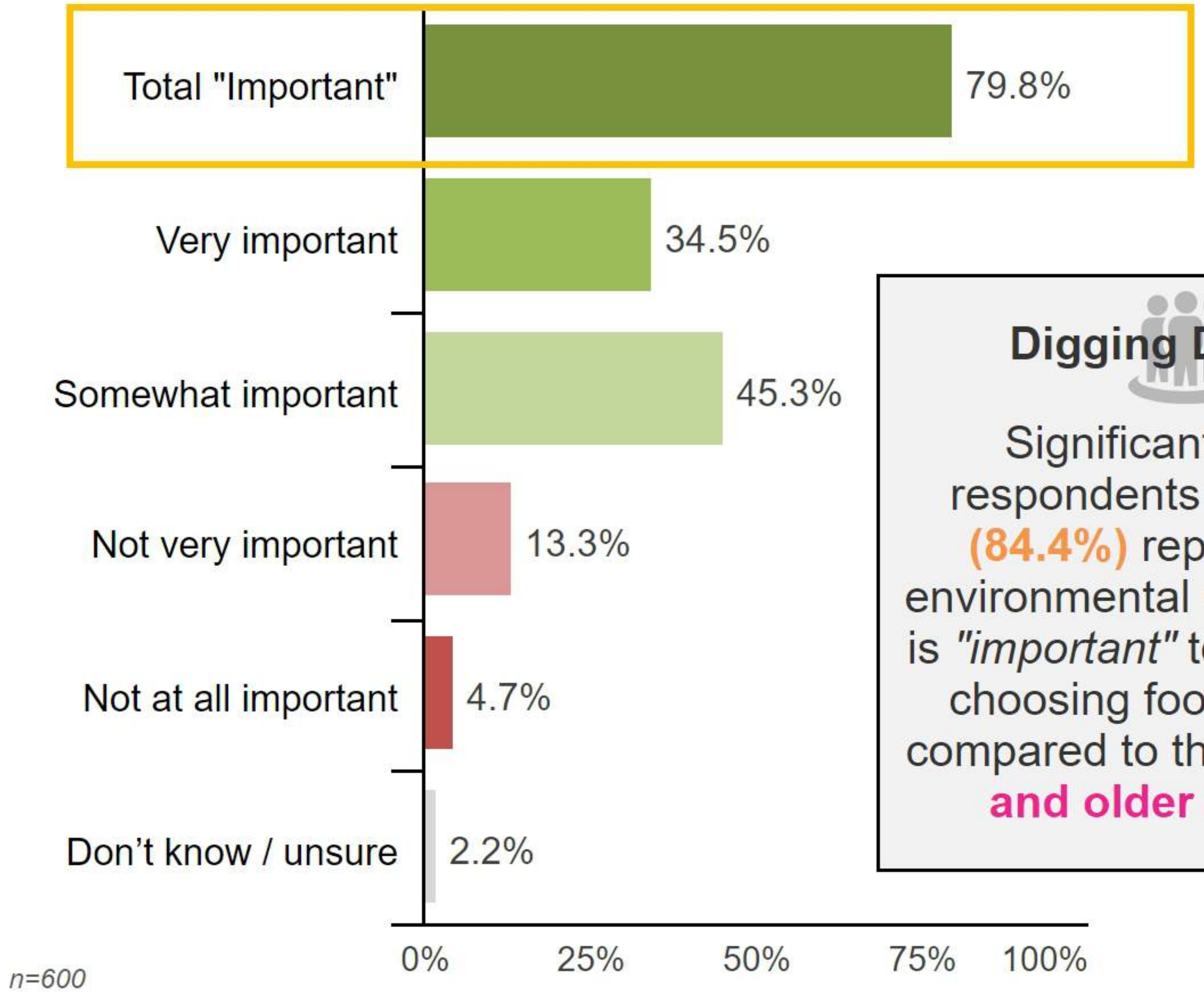
General Awareness | Familiarity with Organic Products

Over three-quarters of respondents reported being familiar with organic food products, overall, with nearly one-half indicating they are only "somewhat familiar." Similarly, more than three-quarters stated that environmental sustainability is important to them when considering different food products.



Digging Deeper

Significantly more respondents with an income of **$100,000 or more (86.7%)** reported being *"familiar"* with organic food products, compared to those earning **under $100,000 annually (74.1%).**



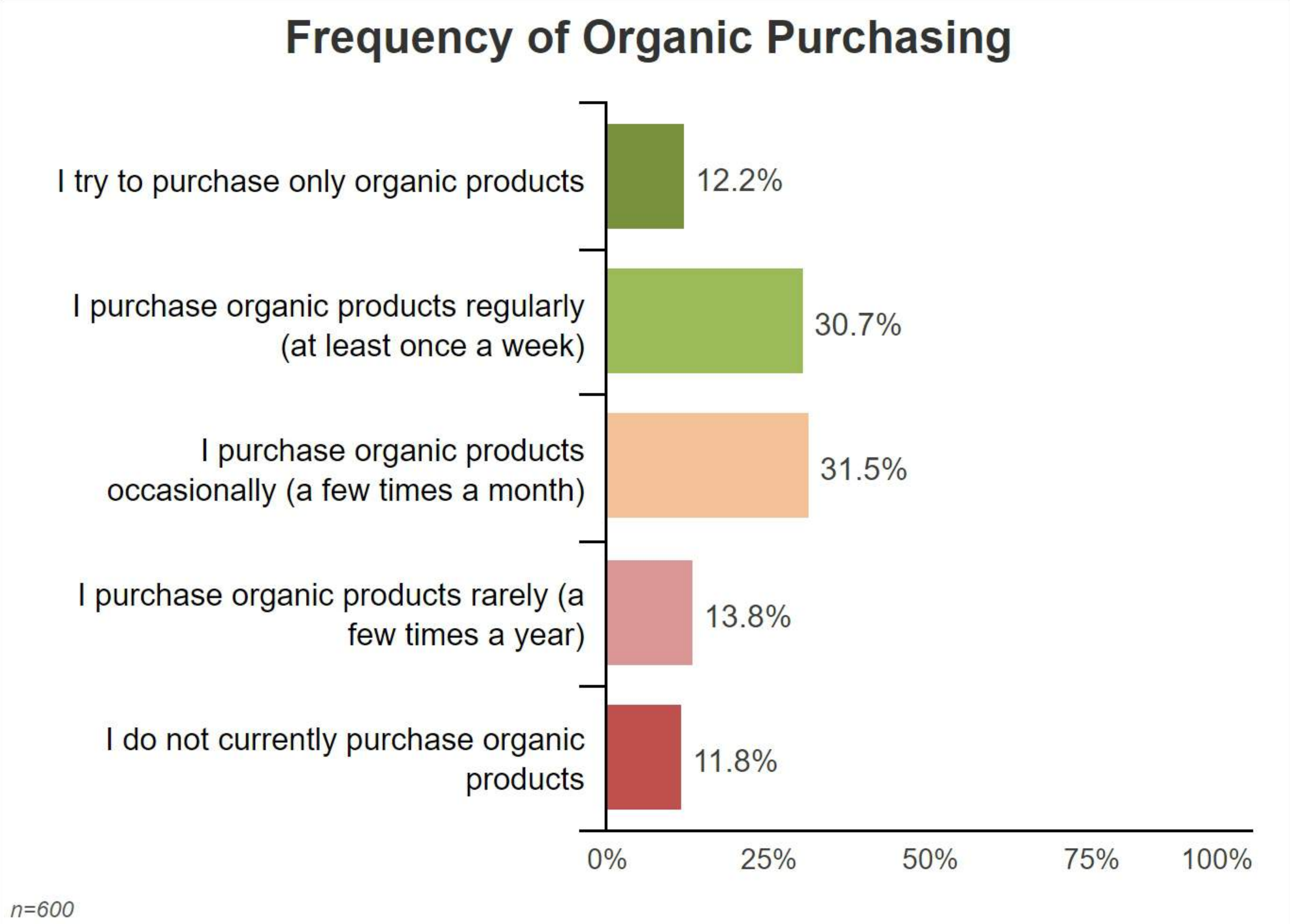
Digging Deeper

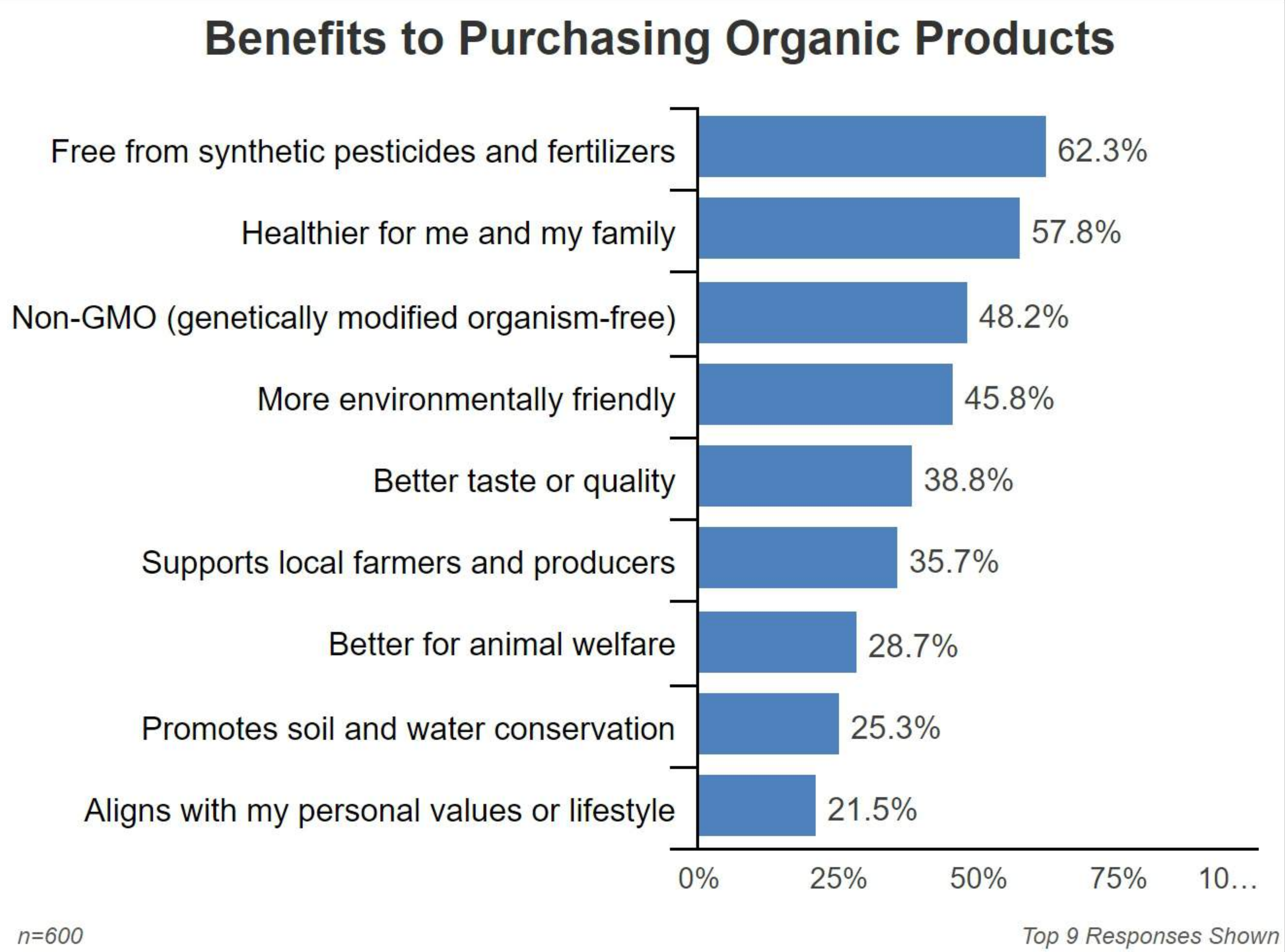
Significantly more respondents age **18-44 (84.4%)** reported that environmental sustainability is *"important"* to them when choosing food products compared to those **ages 45 and older (76.1%).**

Q: In general, how familiar are you with organic food products?
Q: How important is environmental sustainability to you when choosing food products?

General Awareness | Organic Purchasing Behavior

Nearly one-third of respondents reported "purchasing organic products occasionally," followed by a similar proportion who "purchase organic products regularly." Based on their own experiences and knowledge, more than one-half of respondents associated organic products with being "free from synthetic pesticides and fertilizers" and/or "healthier for me and my family."





Q: How often do you purchase organic food products?
Q: Based on your experience or all that you know or have heard, what benefits do you personally associate with organic products? (Select all that apply)

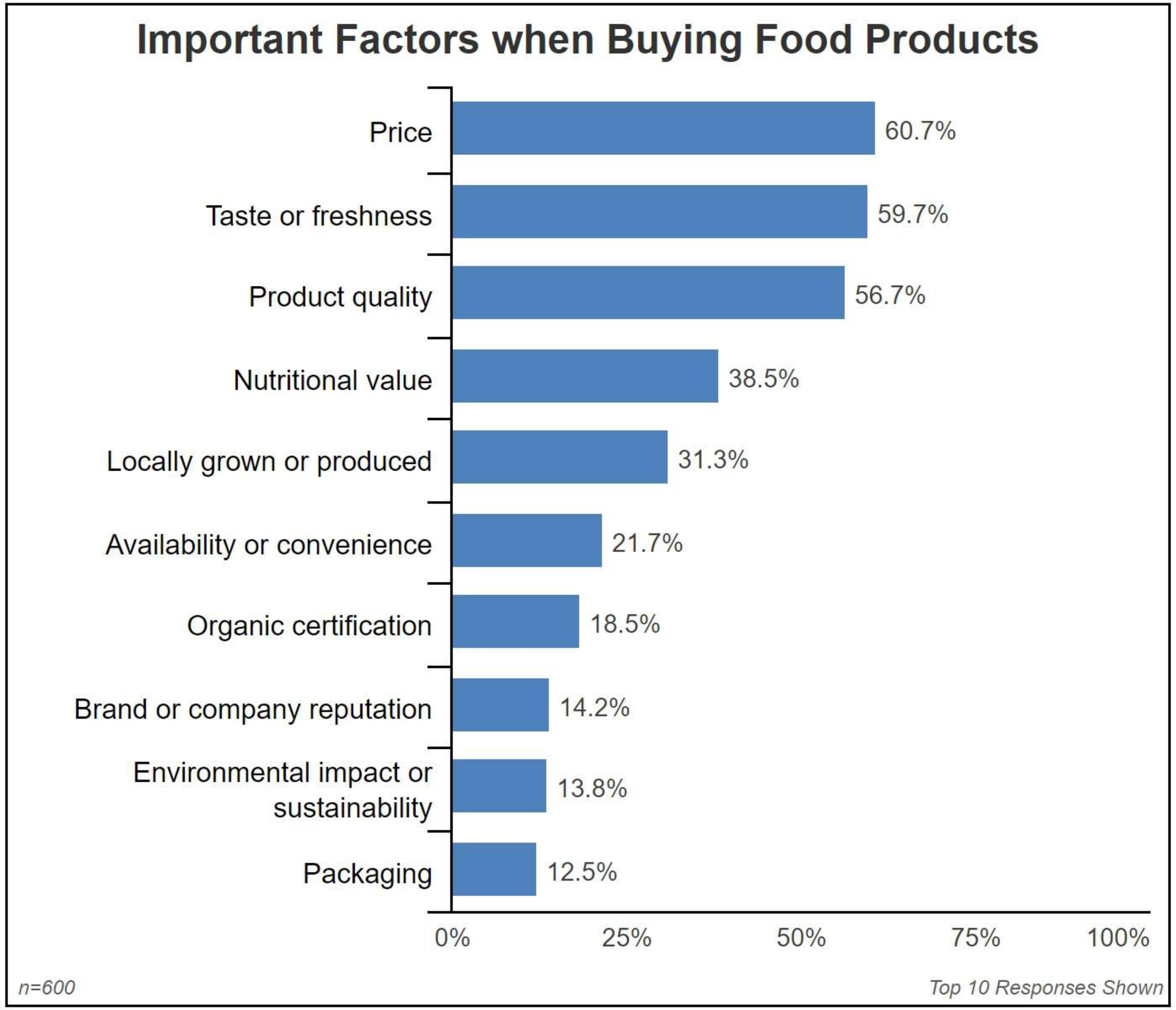
General Awareness | Buying Factors

Three-fifths of respondents identified "price" as one of the most important factors when buying food products, followed by over one-half who cited "taste or freshness" and/or "product quality."

Notably, nearly one-fifth of respondents considered "organic certification" to be an important factor in their purchasing decisions.

Digging Deeper

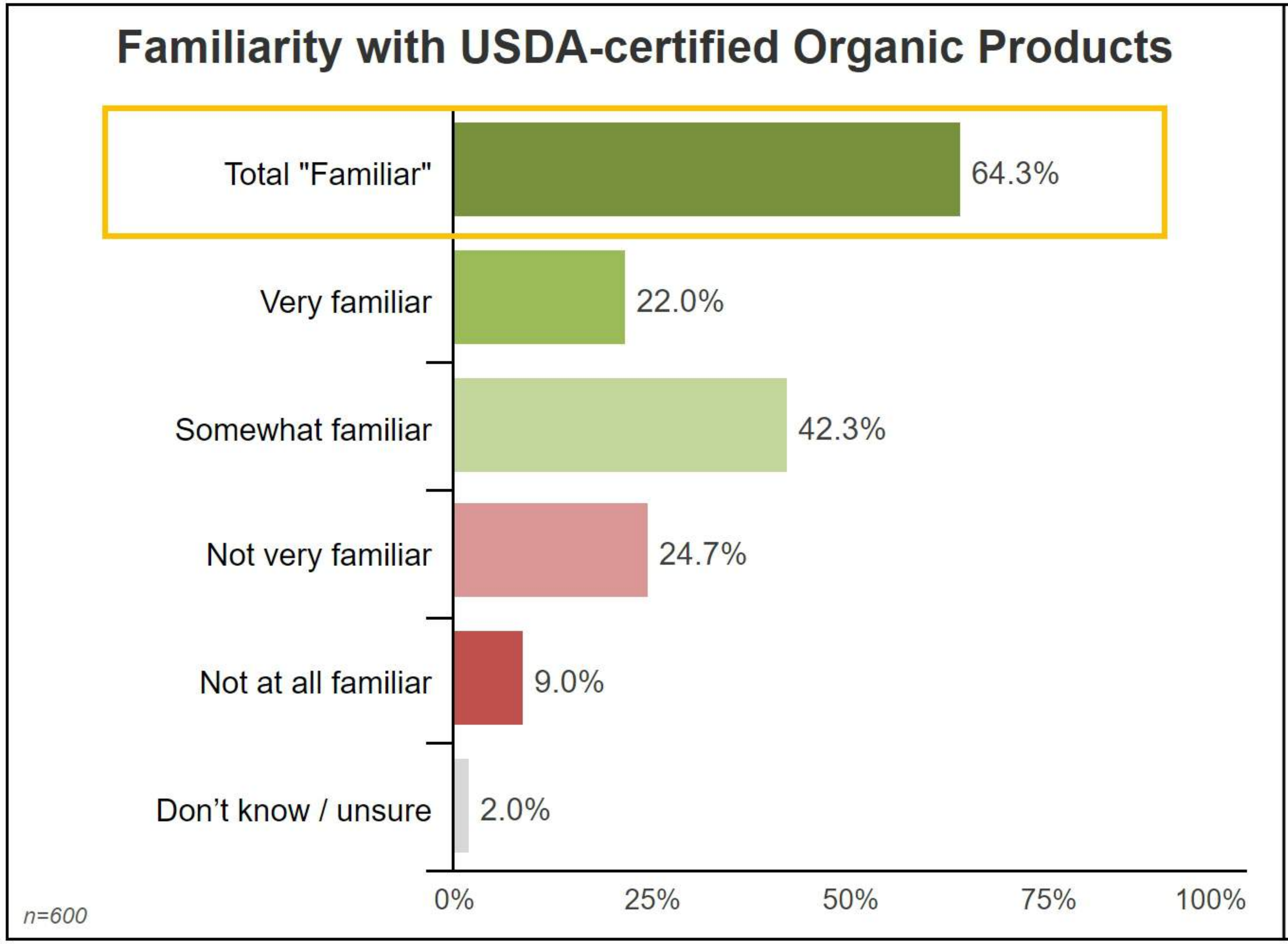
Nearly three-quarters of **Non-Organic Consumers (74.6%)** and **Occasional Organic Consumers (75.0%)** reported that *"price"* is the most important factor when buying food products, while more than one-half of **Committed Organic Consumers (57.6%)** prioritized *"product quality."*

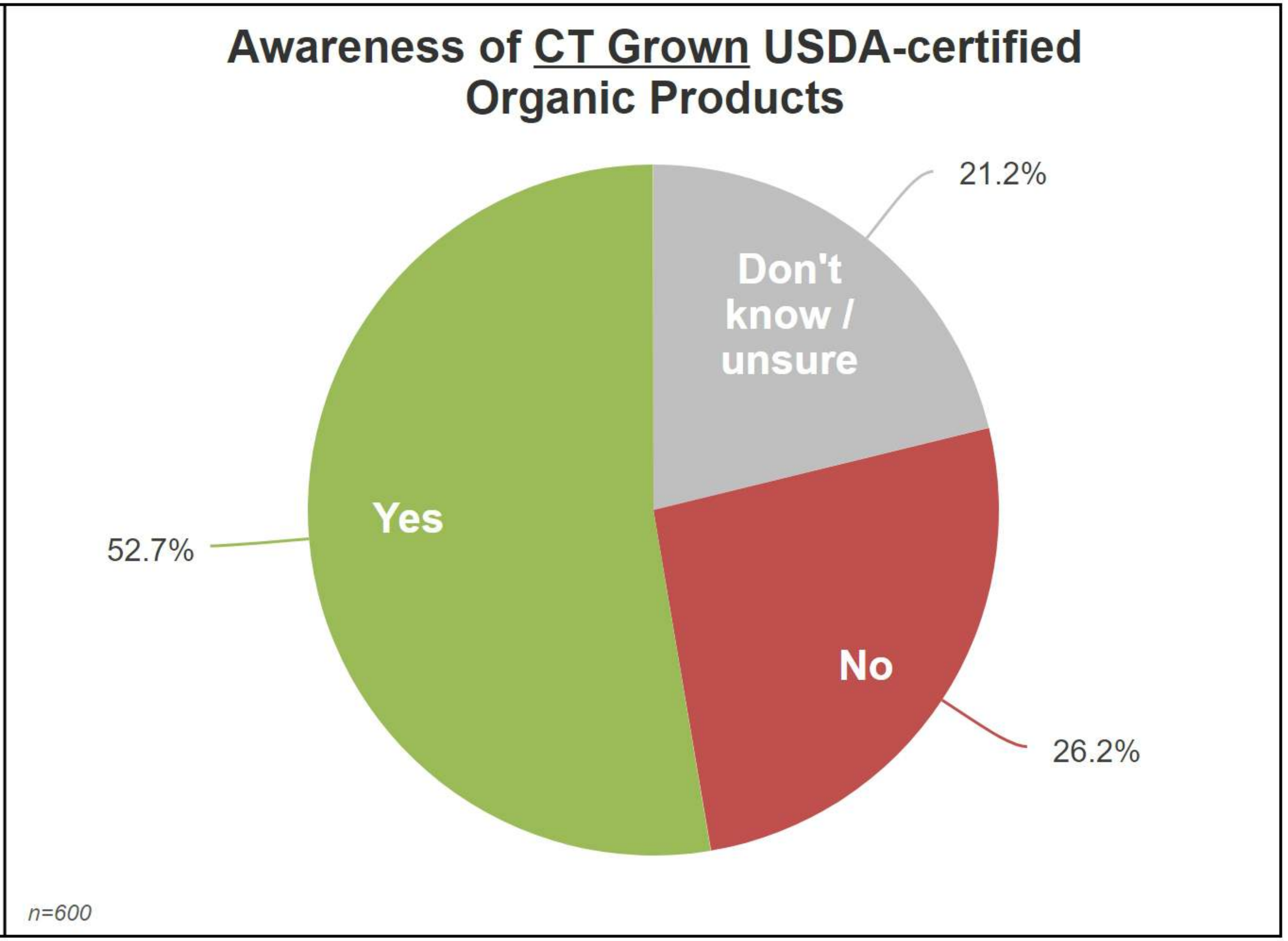


Q: When deciding which food products to purchase, which of the following factors are most important to you? (Select up to four responses)

CT Organic Awareness | Overall Familiarity

Nearly two-thirds of respondents reported being familiar with what it means for a product to be USDA-certified organic, while over two-fifths indicated they are only "somewhat familiar." When asked about their awareness of USDA-certified organic products grown locally in Connecticut (CT Grown), more than one-half reported being aware, while over one-quarter were not aware at the time of the survey.





Q: How familiar are you with what it means for a product to be USDA-certified organic?
Q: Before today, have you heard of any USDA-certified organic products grown locally here in Connecticut (i.e. “CT Grown”)?

CT Organic Awareness | Sources of Information

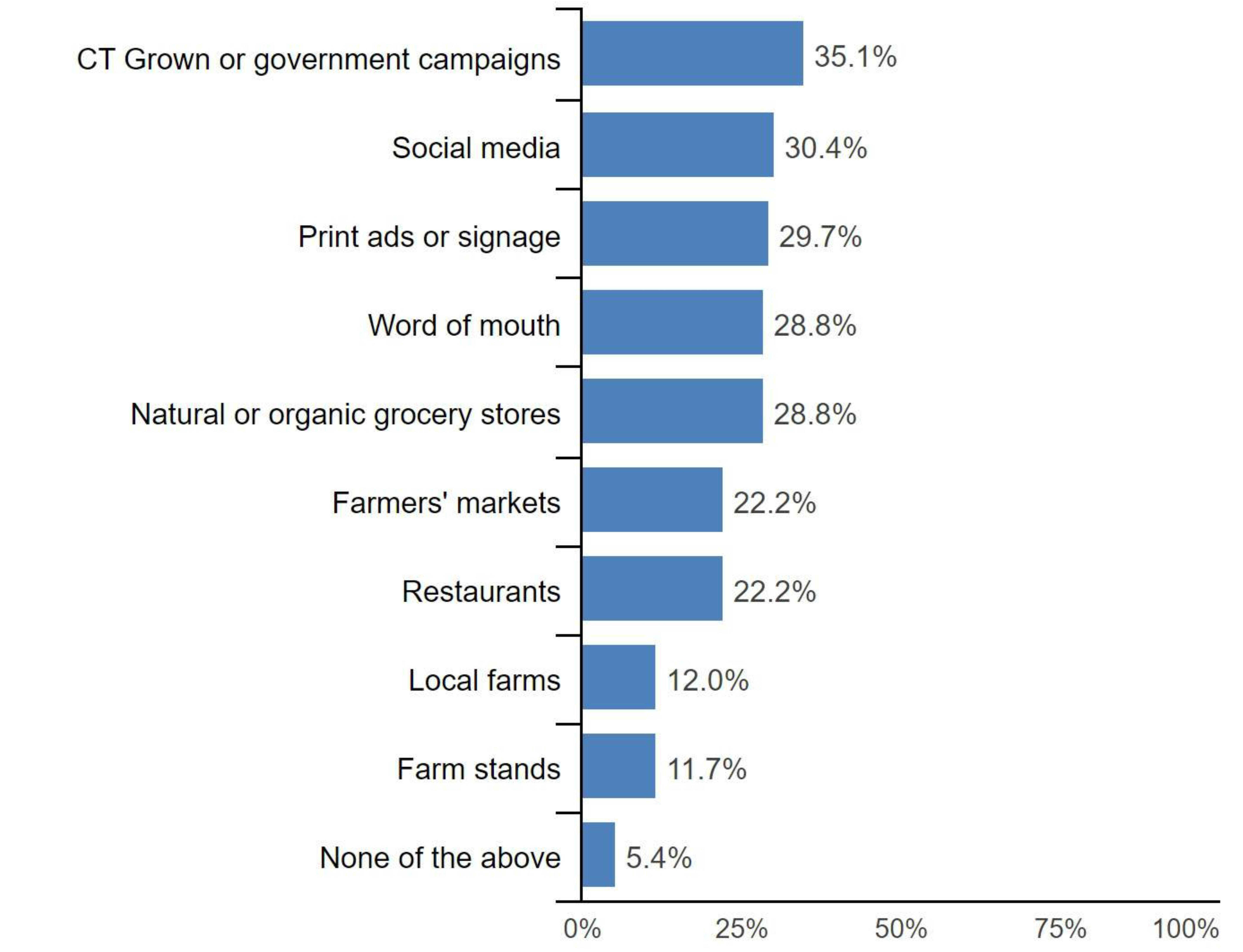
Of the respondents aware of CT Grown USDA-certified products, over one-third of respondents reported seeing or hearing about the products through "CT Grown or government campaigns," followed by nearly one-third who encountered them on "social media."

Notably, over one-quarter of respondents reported exposure through "print ads or signage," "word of mouth," and/or "natural or organic grocery stores."

Digging Deeper

Significantly more respondents **ages 18-44 (43.4%)** reported seeing or hearing about CT Grown USDA-certified organic products through *"social media"* compared to those **ages 45 and older (22.2%).** Conversely, significantly more respondents **aged 45 and older (35.6%)** reported encountering these products at "*natural or organic grocery stores"* compared to respondents aged **18-44 (18.0%).**

Source of CT Grown Organic Product Awareness

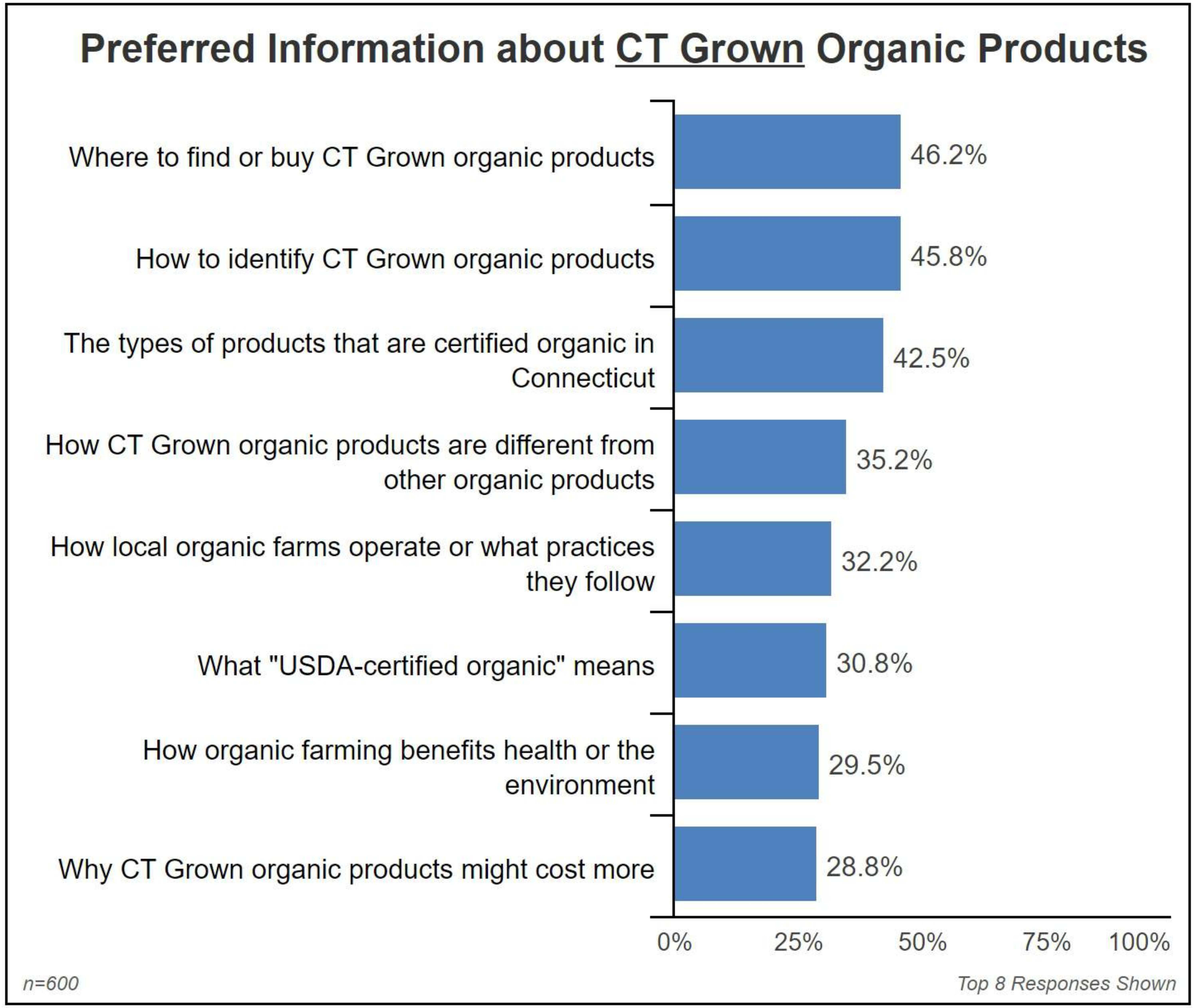


n=316 *Top 10 Responses Shown*

Q: Where have you seen or heard about CT Grown USDA-certified organic products? (Select all that apply)

CT Organic Awareness | Preferred Information

Nearly one-half of respondents indicated that information on "where to find or buy CT Grown organic products" would help them better understand or feel more confident about purchasing USDA-certified organic products grown in Connecticut. This was followed by over two-fifths who said that learning "how to identify CT Grown organic products" and/or "the types of products that are certified organic in Connecticut" would be helpful.

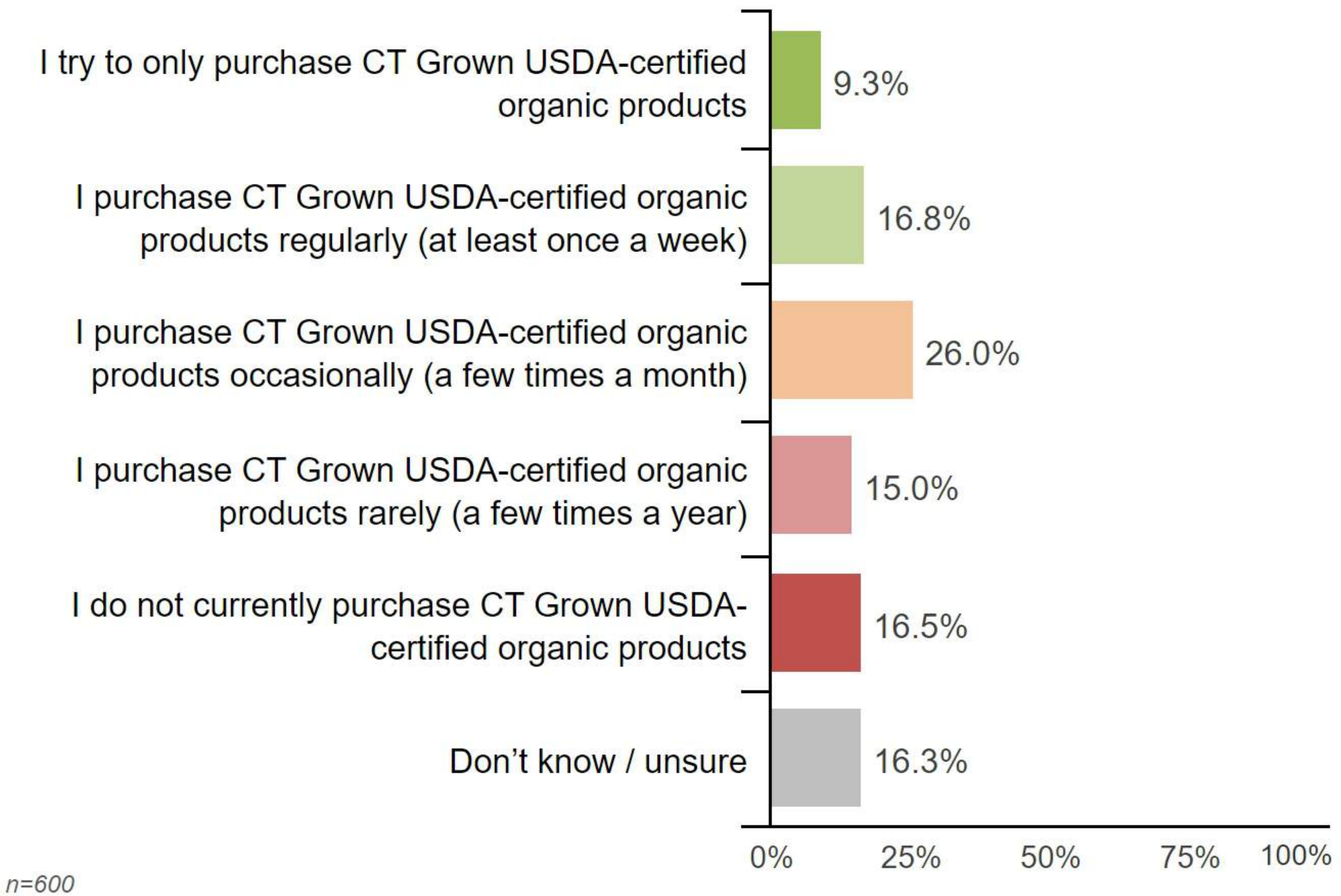


Q: What information would help you better understand or feel more confident about purchasing USDA-certified organic products grown in Connecticut? (Select all that apply)

Purchasing Behavior | CT Grown Organic Locations

Over one-quarter of respondents reported that they "purchase CT Grown USDA-certified organic products occasionally," while a similar proportion (26.1%) said they purchase them "regularly" or "try to only purchase" such products. Among those who do purchase CT Grown USDA-certified organic products, one-half typically buy from "farmers' markets," and over two-fifths purchase from "natural or organic grocery stores."

Frequency of CT Grown Organic Purchasing



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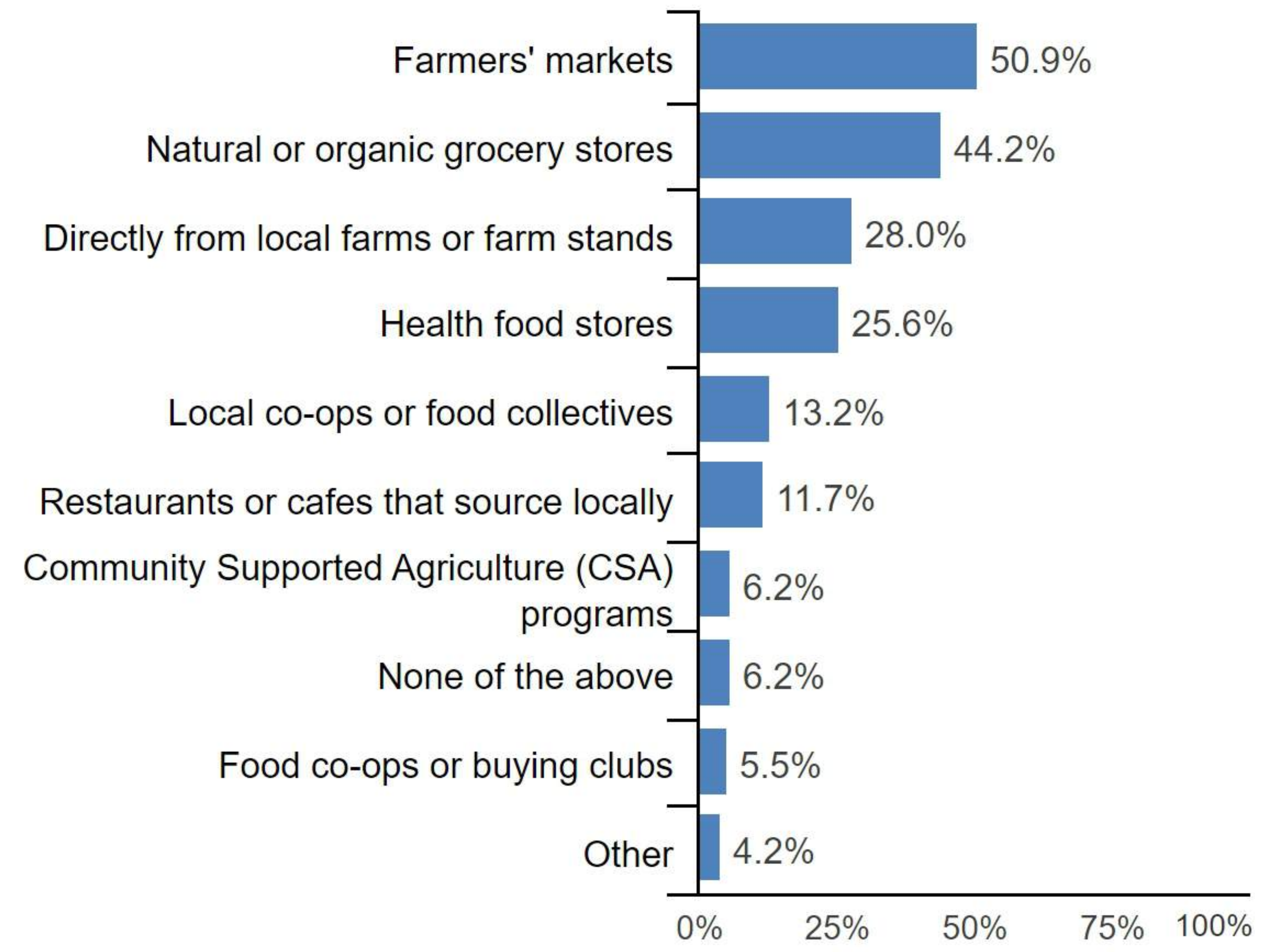
CT Grown Organic Product Purchasing Locations



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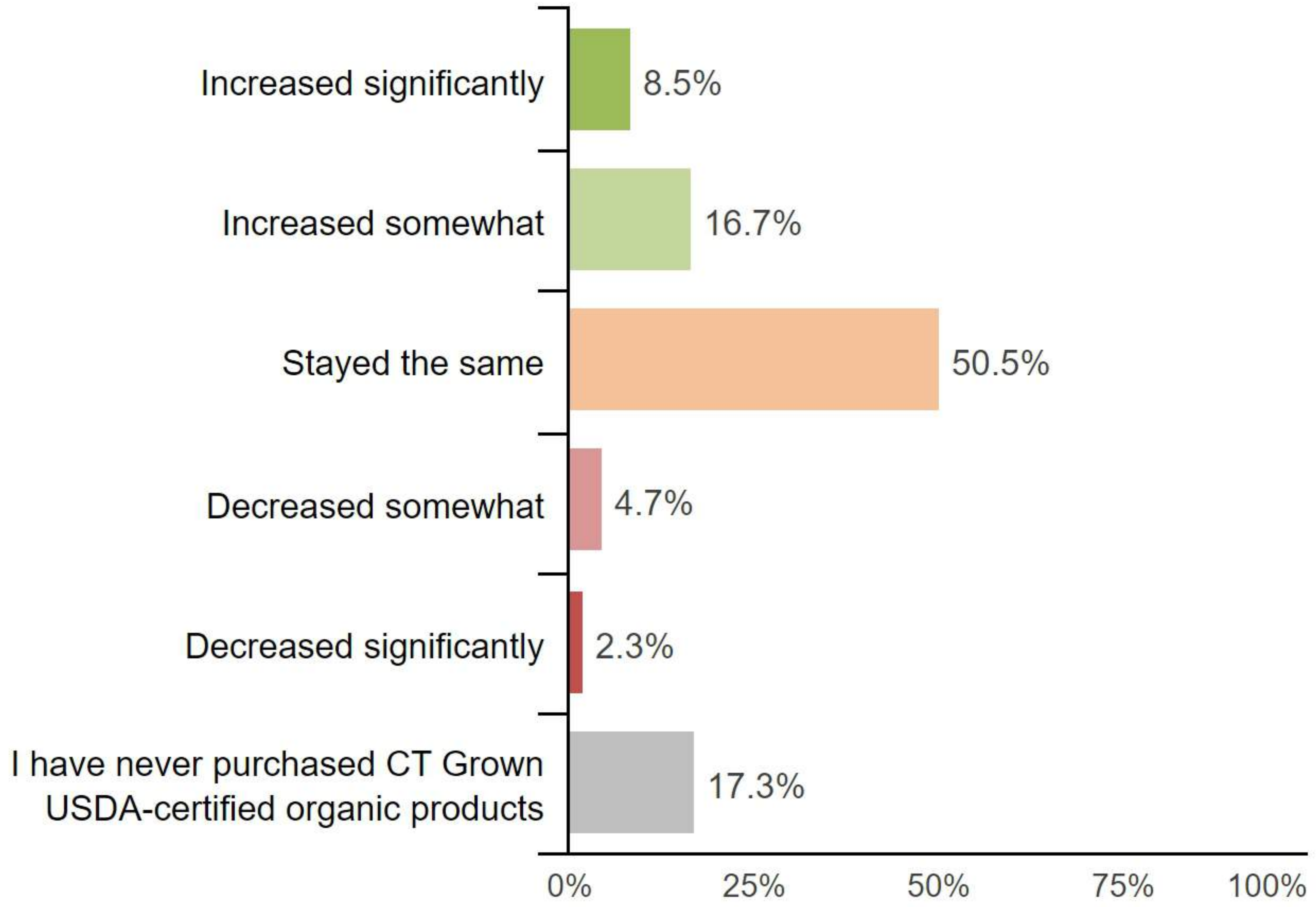
Q: How often do you purchase CT Grown USDA-certified organic food products?
Q: Where do you typically purchase CT Grown USDA-certified organic food products? (Select all that apply).

Purchasing Behavior | Change in Frequency

One-half of respondents reported that their frequency of purchasing CT Grown USDA-certified organic food products has "stayed the same" over the past year, while one-quarter (25.2%) said it has increased either "somewhat" or "significantly." Among those who reported a change, over one-quarter cited adopting a "healthier lifestyle / better food choices / diet" as the main reason, while another fifth reported it was due to "price / affordability."

Change in Frequency of CT Grown Organic Purchasing



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Reasons for Change in Purchasing Frequency

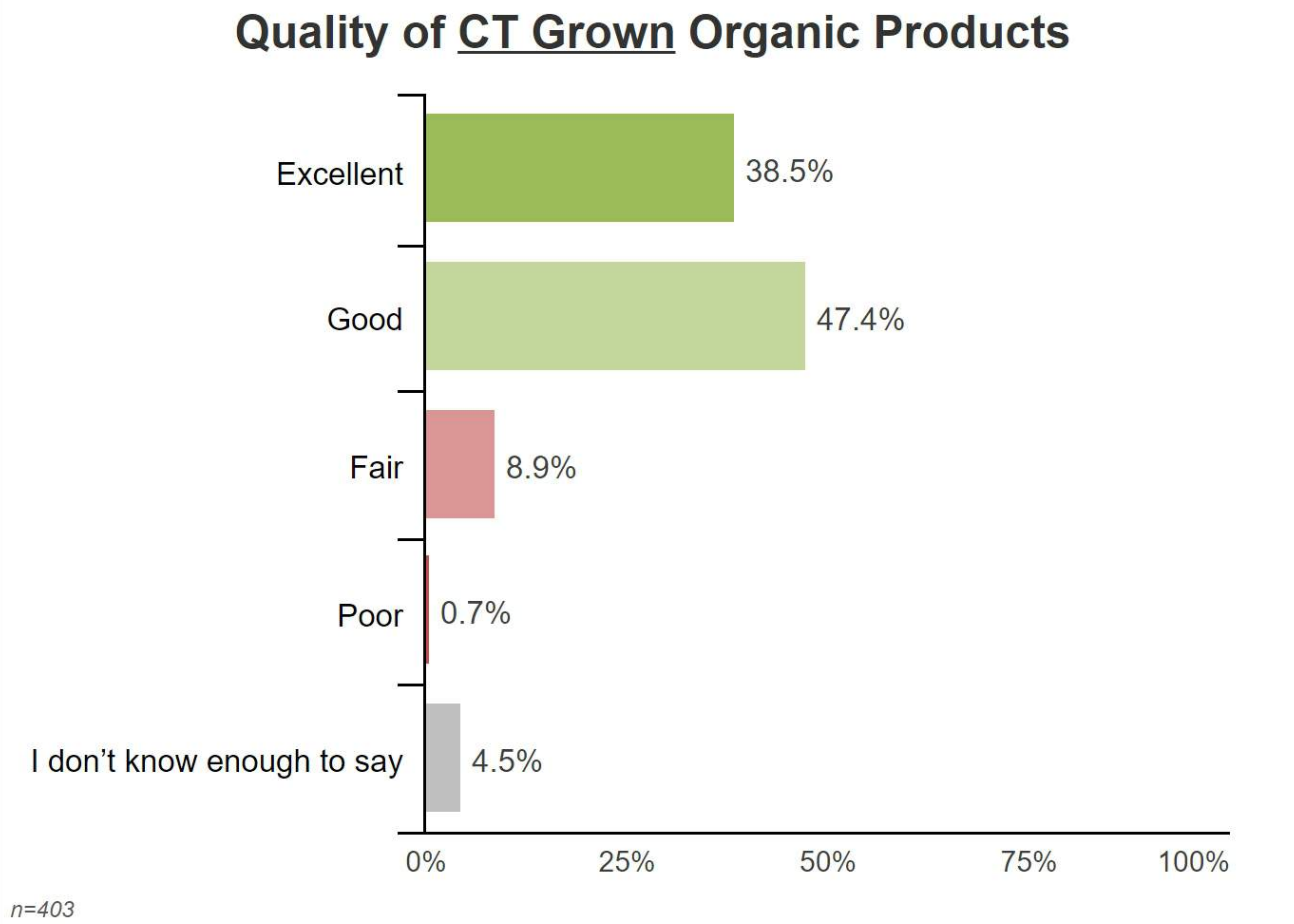
Base size	*193*
Healthier lifestyle / better food choices / diet	27.5%
Price / affordability	19.2%
Supporting local / community	15.0%
Quality / taste / freshness	10.4%
Availability / accessibility	6.2%

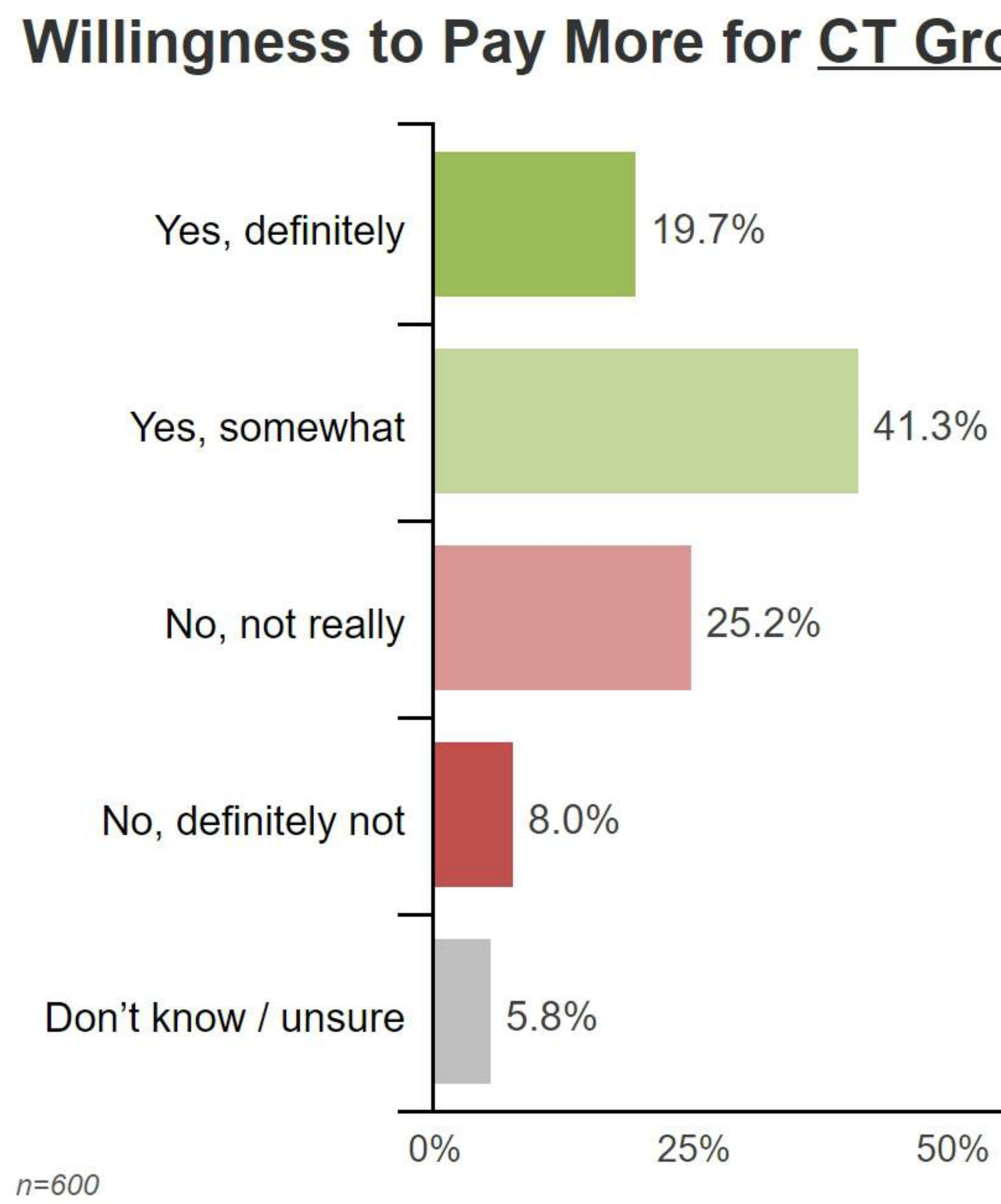
Top 5 Responses Shown

Q: In the past year, has your purchase of CT Grown USDA-certified organic food products...
Q: What is the main reason your purchases of CT Grown USDA-certified organic products have changed recently?

Purchasing Behavior | CT Grown Organic Quality

Nearly nine-out-of-ten respondents rated the quality of CT Grown USDA-certified organic products as "excellent" or "good" (85.9%). When asked about their willingness to pay more specifically for CT Grown USDA-certified organic products compared to non-organic options, over two-fifths said they would be "somewhat" willing to pay more, while one-fifth were "definitely" willing to do so.





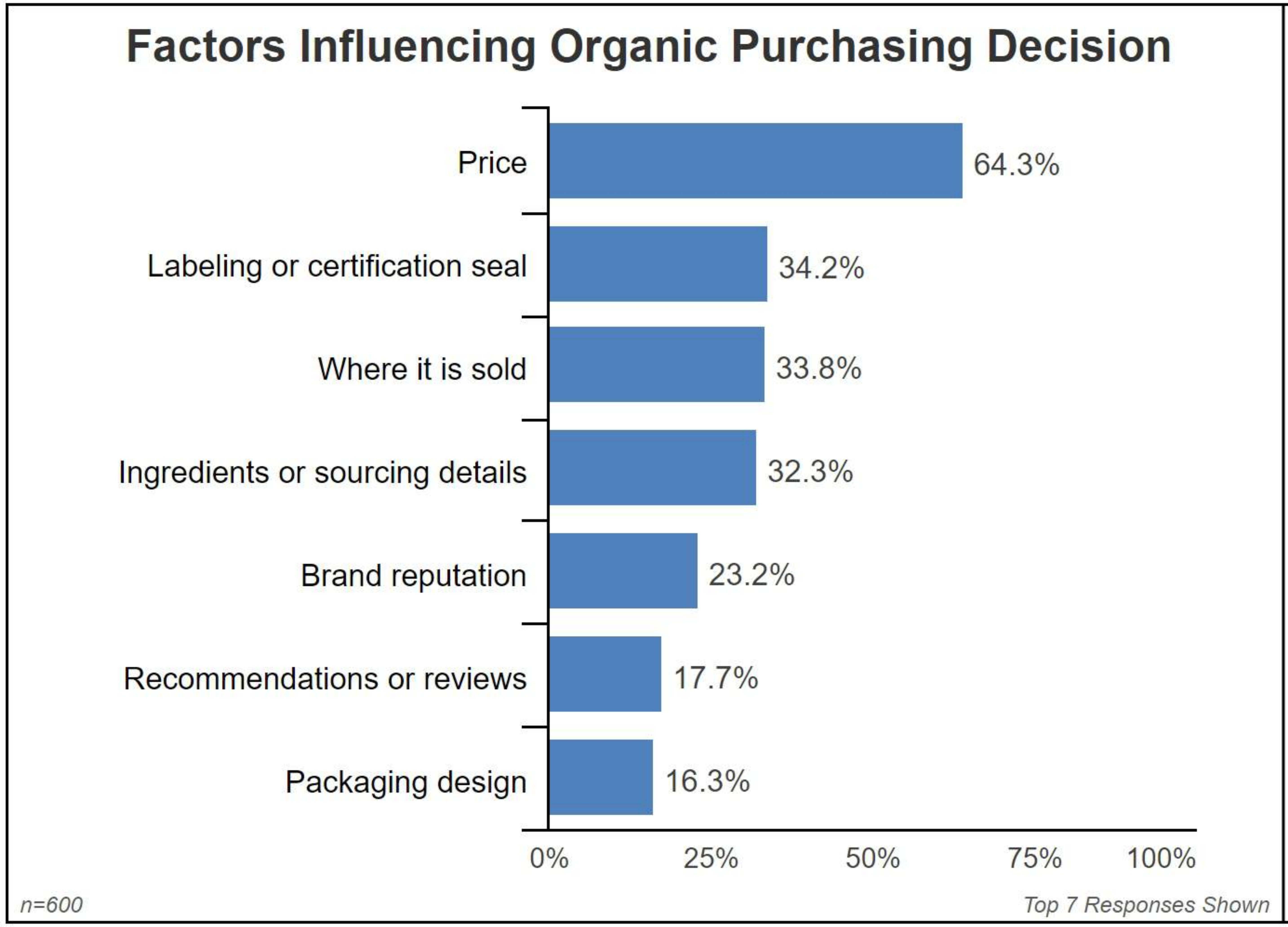
Digging Deeper

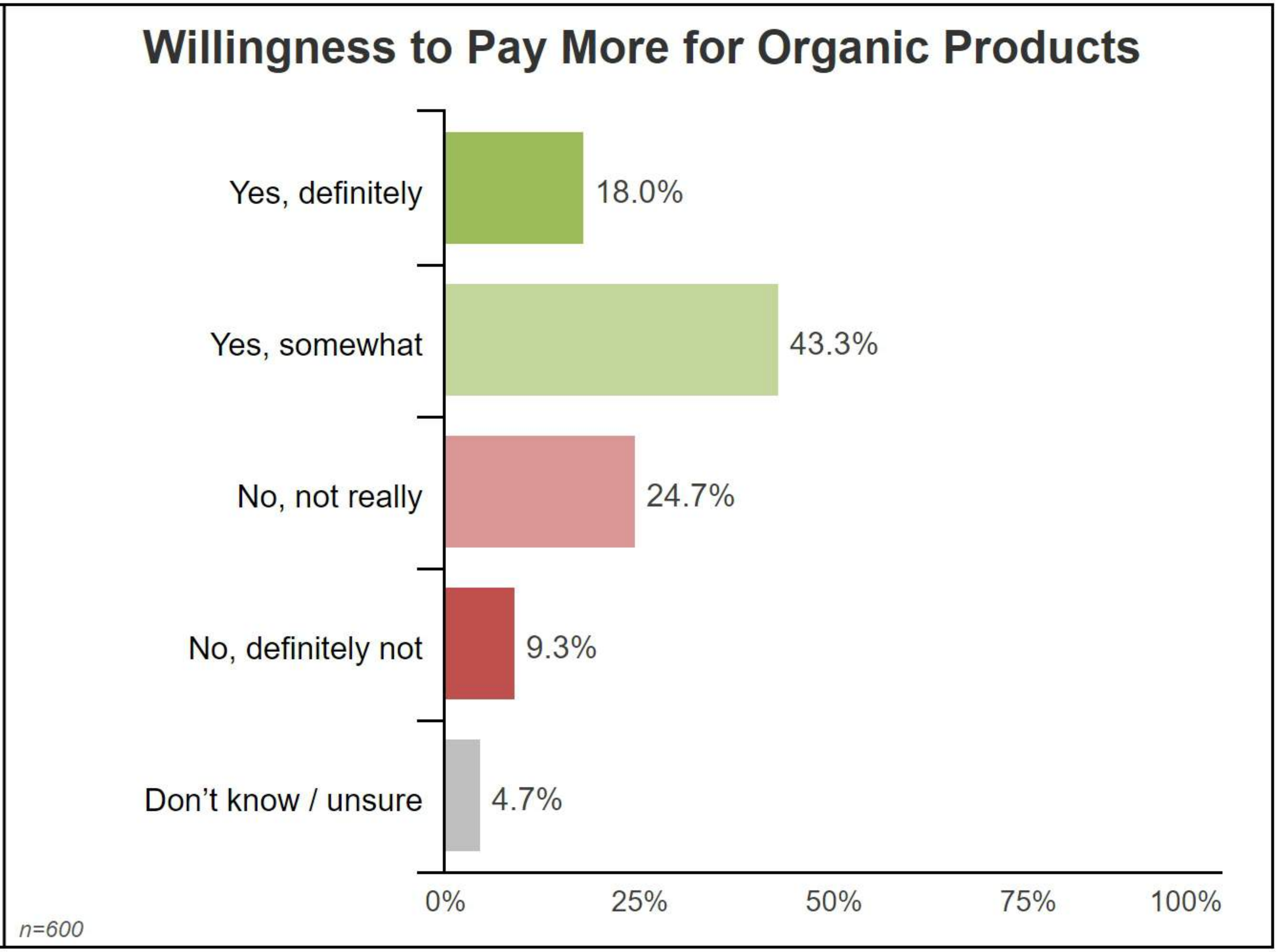
Significantly more respondents age **18-44 (26.4%)** reported they would "definitely" be willing to pay more for CT Grown Organic products compared to those **ages 45 and older (15.4%).**

Q: In your opinion, how would you rate the quality of CT Grown USDA-certified organic products?
Q: Are you willing to pay more, specifically, for CT Grown USDA-certified organic products compared to non-organic options?

Purchasing Behavior | Organic Products

Nearly two-thirds of respondents reported that the "price" of USDA-certified organic products influences their decision to choose one organic product over another, while over one-third cited factors such as the "labeling or certification seal," "where it is sold," and/or "ingredients or sourcing details." When asked about their willingness to pay more for organic products in general, over two-fifths said they would be "somewhat" willing to pay more, while nearly one-fifth were "definitely" willing.

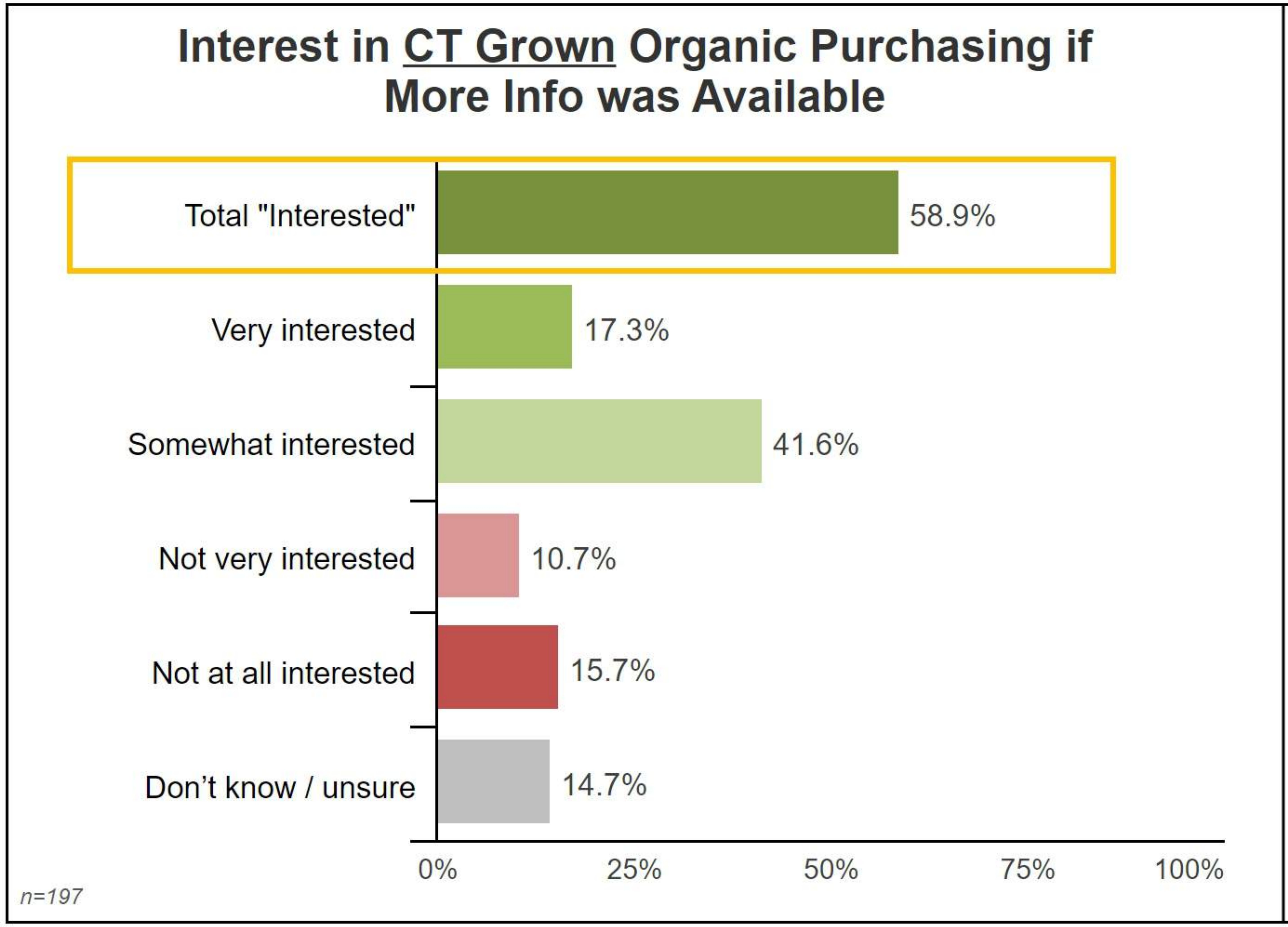


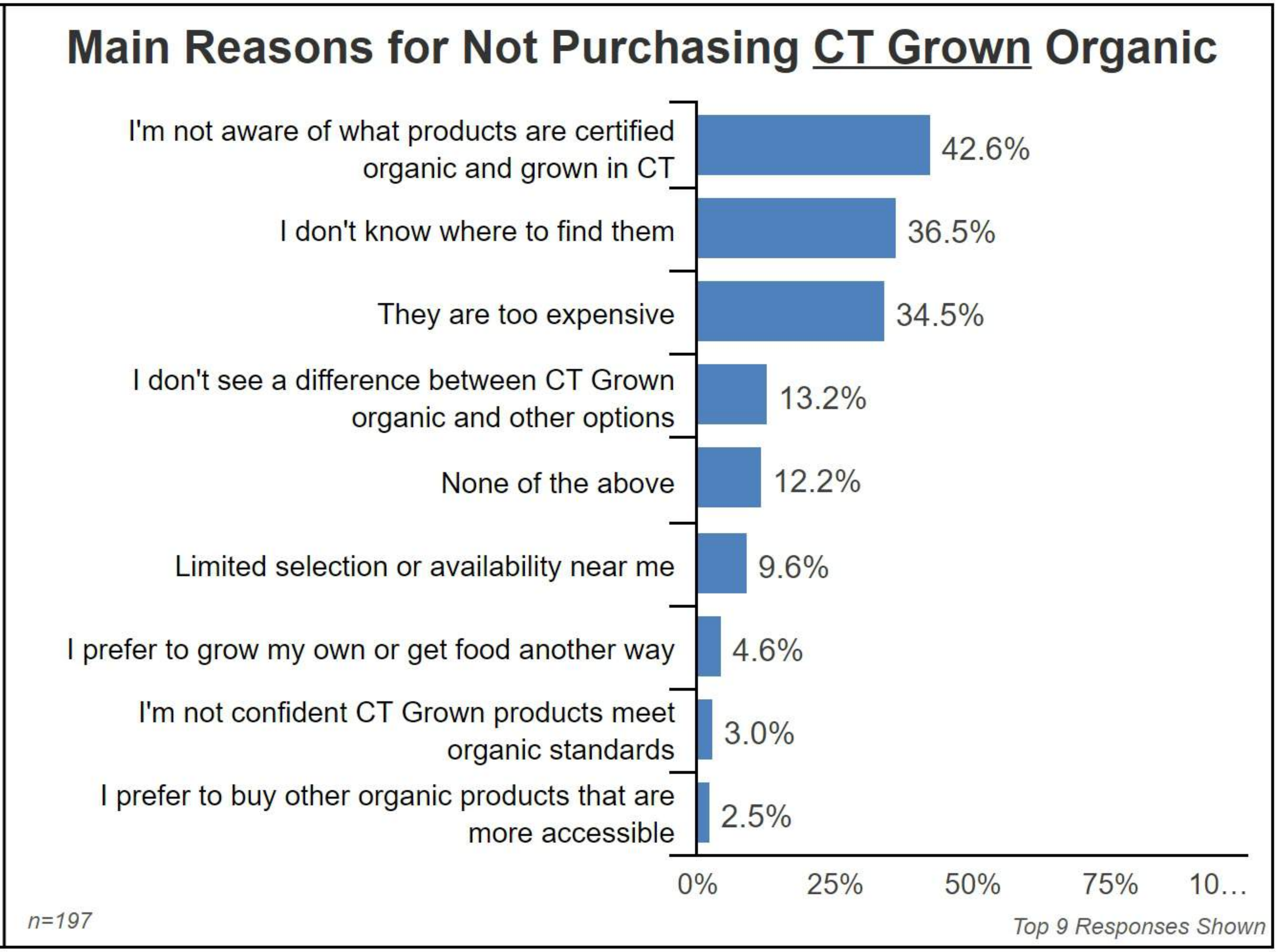


Q: What factors influence (or would influence) your decision to purchase one USDA-certified organic product over another? (Select all that apply)
Q: Are you willing to pay more, in general, for USDA-certified organic products compared to non-organic options?

Purchasing Behavior | Organic Products

Among respondents who do not currently purchase CT Grown USDA-certified organic products, over two-fifths cited being "not aware of what products are certified organic and grown in CT" as their main reason, while over one-third reported they "don't know where to find them" and/or they thought they were "too expensive." However, one-half of these respondents expressed interest in purchasing such products if more information or access were available, with over two-fifths being "somewhat interested."



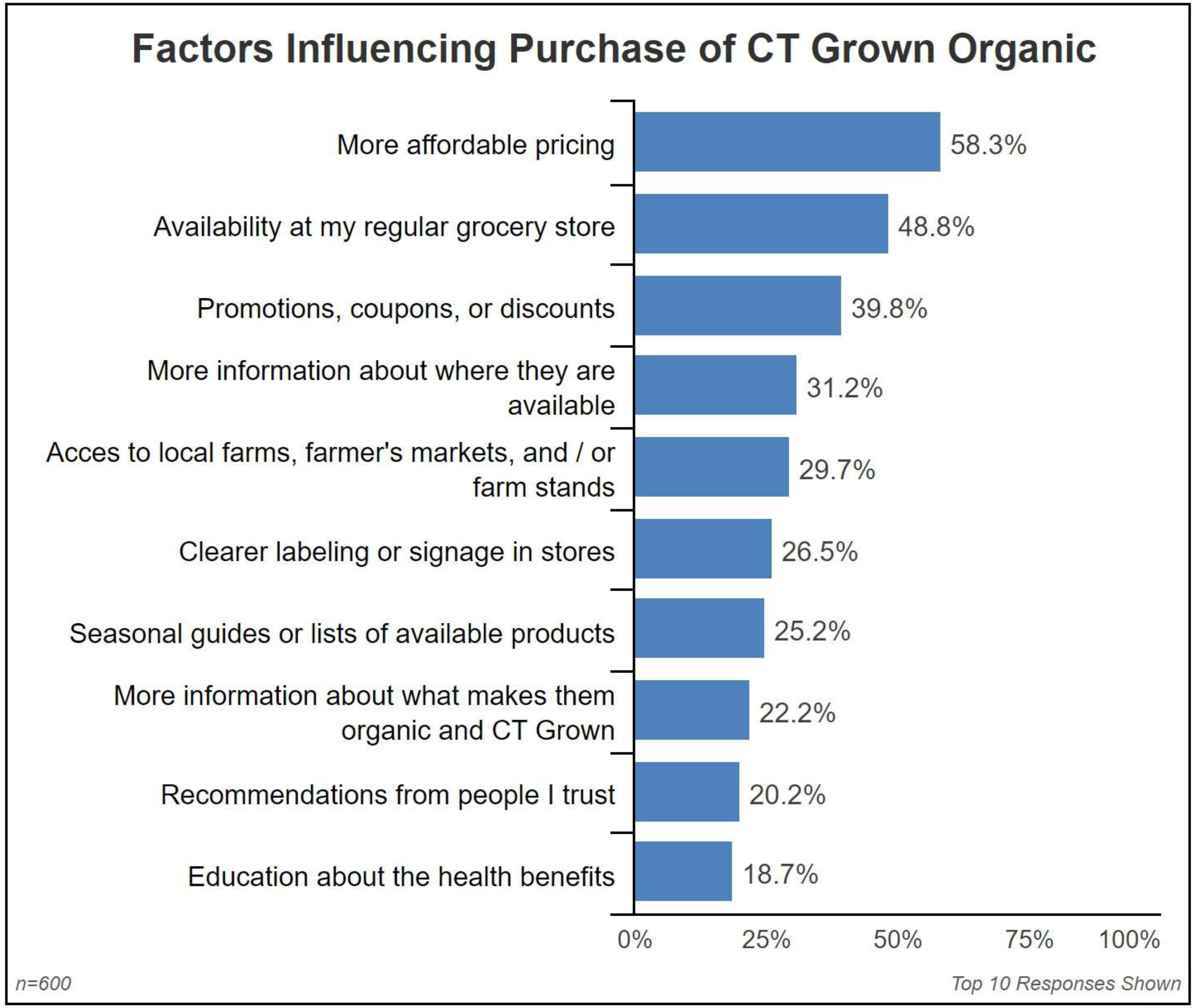


Q: How interested would you be in purchasing CT Grown USDA-certified organic products if more information or access were available?
Q: What are the main reasons you do not currently purchase CT Grown USDA-certified organic food products? (Select all that apply)

Consumer Needs | Drivers to Purchase CT Grown Organic

Roughly one-half of respondents indicated that "more affordable pricing" and/or "availability at my regular grocery store" would make them more likely to purchase CT Grown USDA-certified organic food products in the future.

Notably, over one-third cited "promotions, coupons, or discounts" and/or "more information about where they are available" as motivating factors.

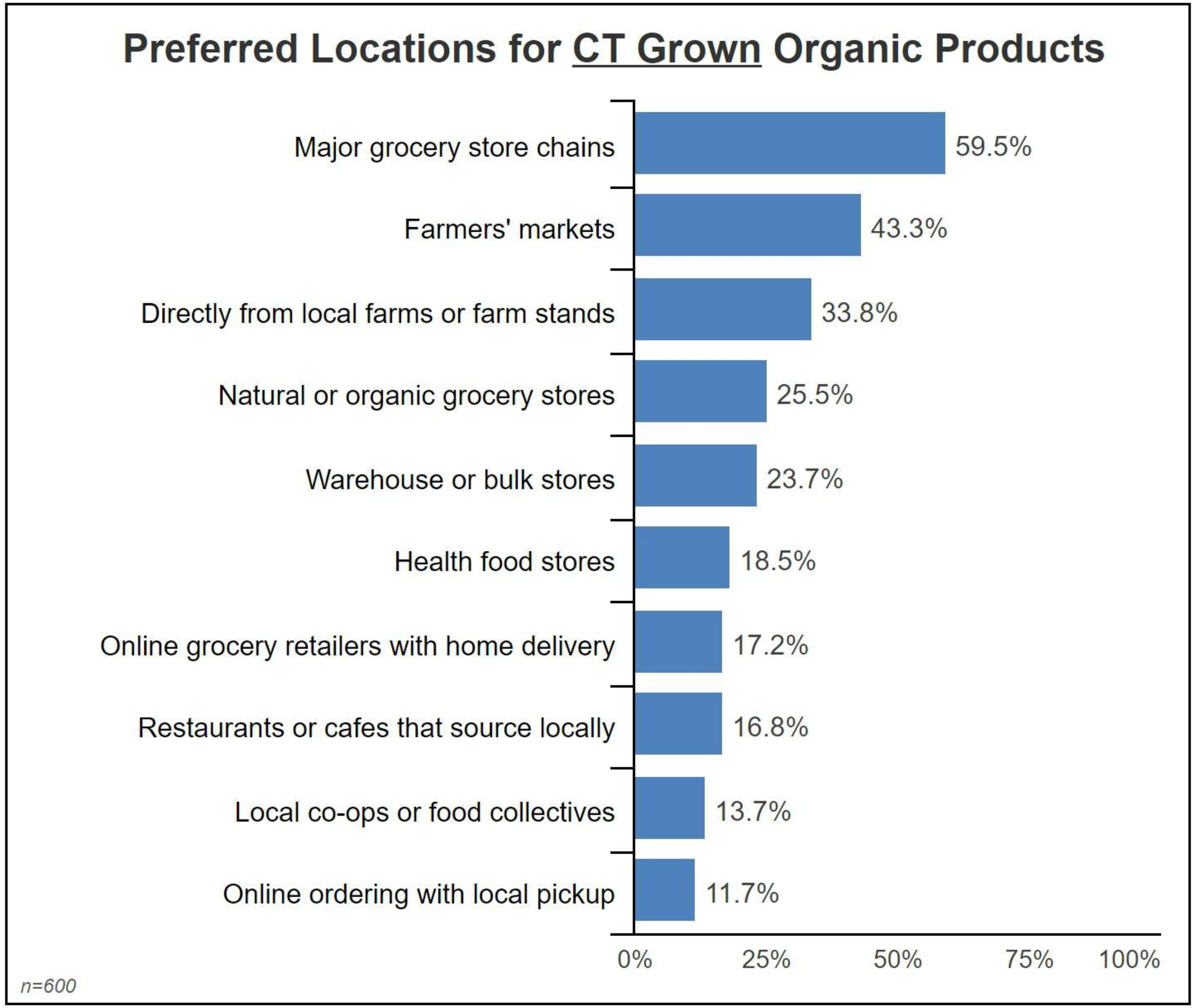


Q: Which of the following would make you more likely to purchase CT Grown USDA-certified organic food products in the future? (Select all that apply)

Consumer Needs | Preferred Locations for CT Grown Organic

Over one-half of respondents said they would prefer to access CT Grown USDA-certified organic products at "major grocery store chains," followed by over two-fifths who preferred "farmers' markets."

When asked about factors that make it difficult to find or buy these products, over two-fifths of respondents cited "nothing," indicating no perceived barriers.



Difficulties Finding or Buying CT Grown Organic

Base size	*600*
None / nothing	42.7%
Price / affordability	14.3%
Availability / accessibility	14.0%
Awareness / education	10.2%
Convenience / proximity / location	5.2%

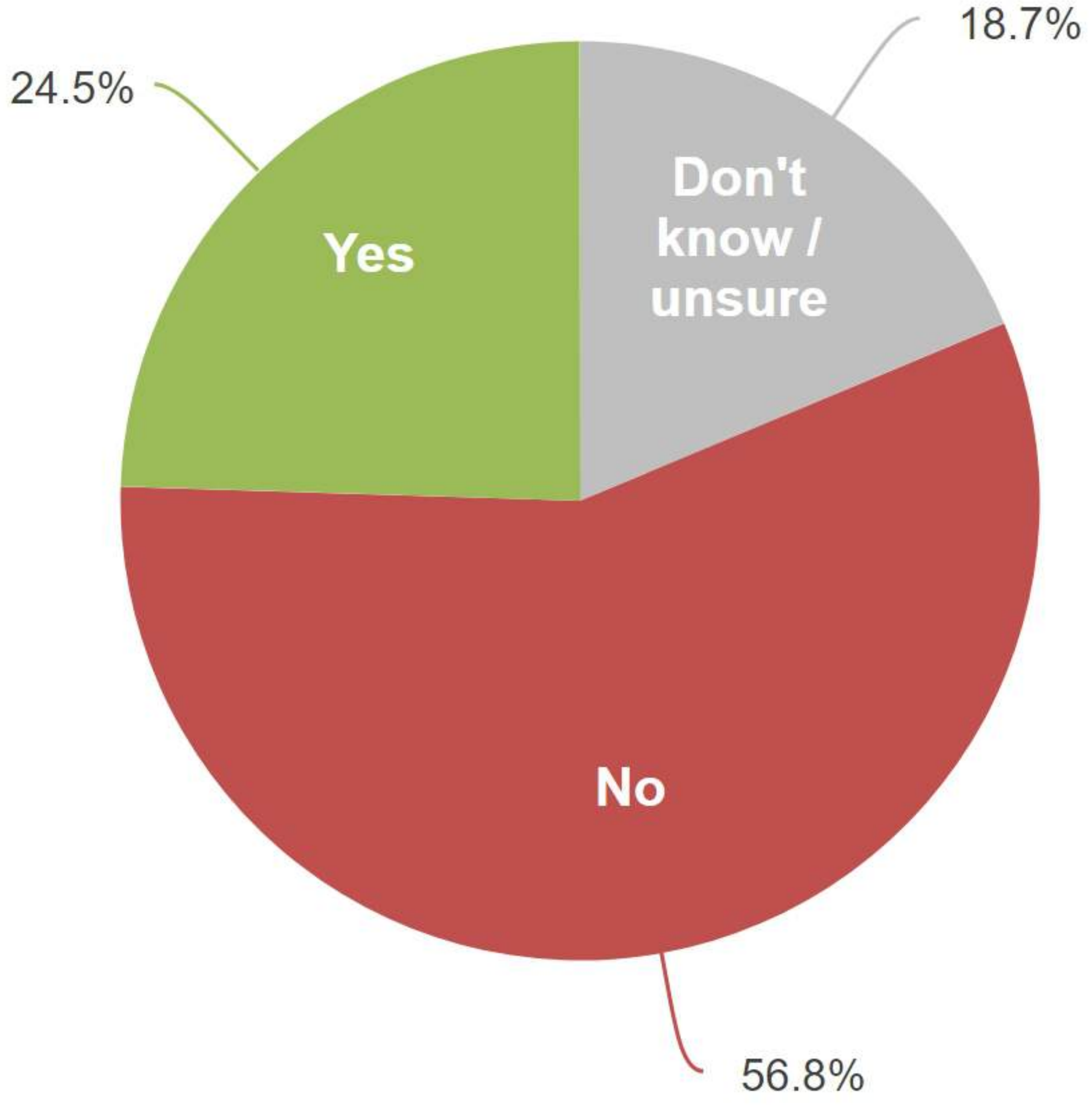
Top 5 Responses Shown

Q: How would you prefer to access CT Grown USDA-certified organic products? (Select all that apply)
Q:Is there anything that makes it difficult for you to find or buy CT Grown USDA-certified organic products?

Education | Overall Familiarity

As a baseline, over one-half of respondents reported not seeing any information campaigns promoting CT Grown USDA-certified organic products, while nearly one-quarter said they had seen such campaigns. Among those who did, nearly two-fifths recalled seeing them at "community events or farmers' markets," followed by over one-third who saw the campaigns on "in-store signage or displays."

Awareness of CT Grown Organic Information Campaigns



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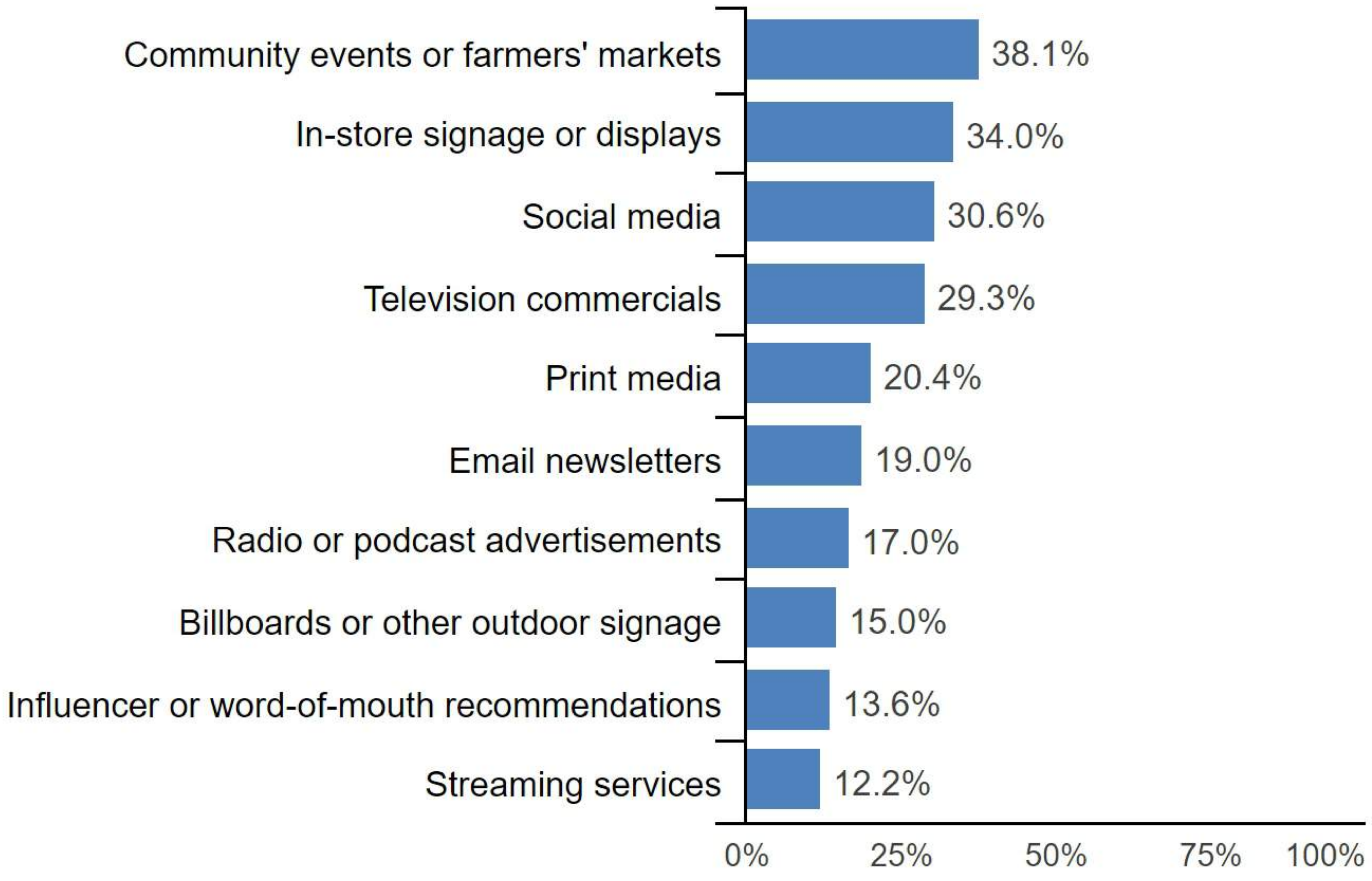
Source of Seeing Information Campaigns



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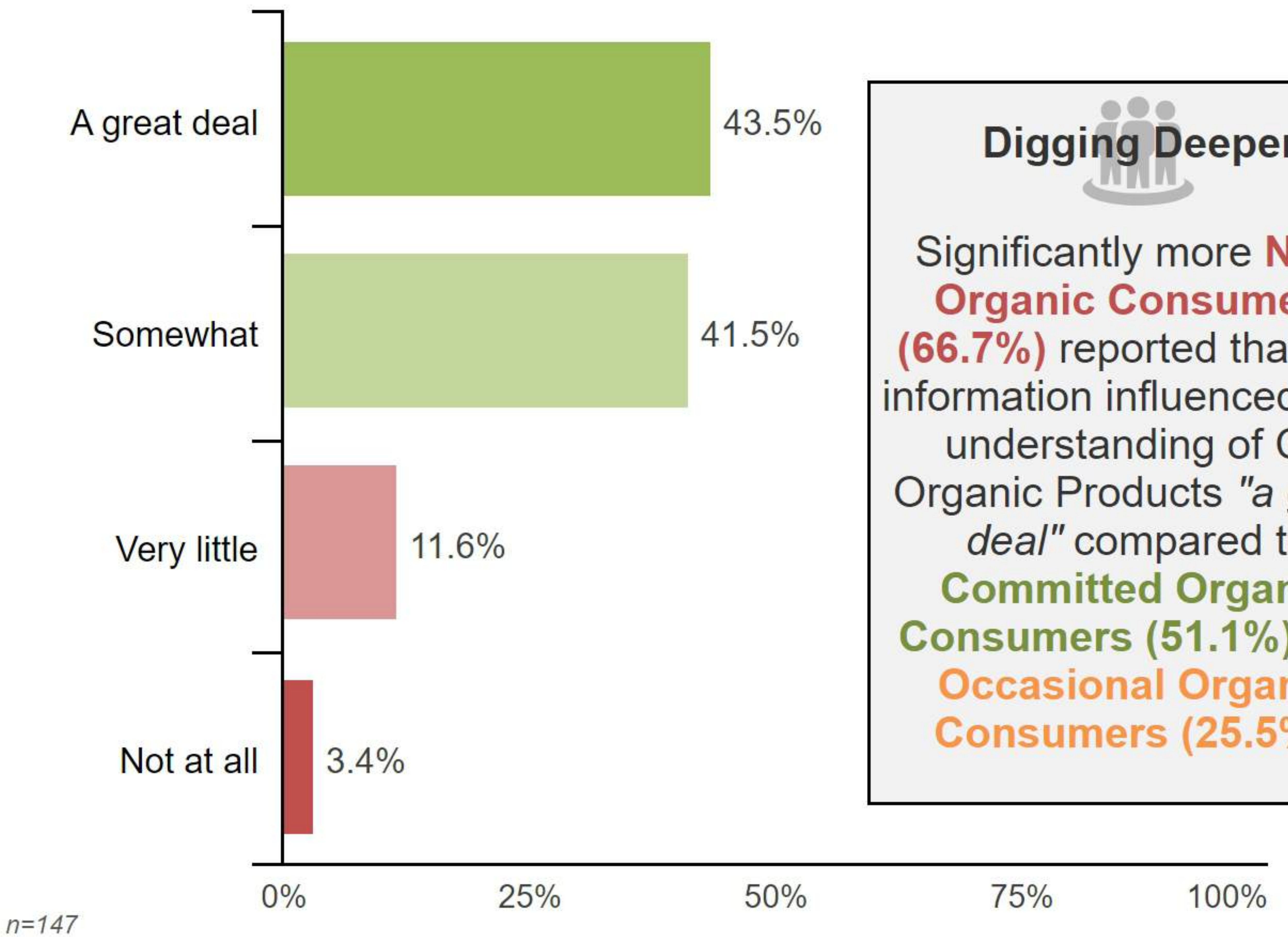
Top 10 Responses Shown

Q: Have you seen or heard any information campaigns (such as CT Grown) promoting CT Grown USDA-certified organic products?
Q: Where did you see these advertisements or promotions for CT Grown USDA-certified organic products? (Select all that apply)

Education | Communication Methods

Over two-fifths of respondents reported that the information they received influenced their understanding or purchasing of CT USDA-certified organic products, while a similar proportion said it "somewhat" influenced them. Nearly one-half of respondents said they would prefer to receive future promotions through "in-store signage or displays," followed by nearly one-third who preferred "social media" and/or "community events or farmers' markets."

Influence of Information on Purchasing Decision



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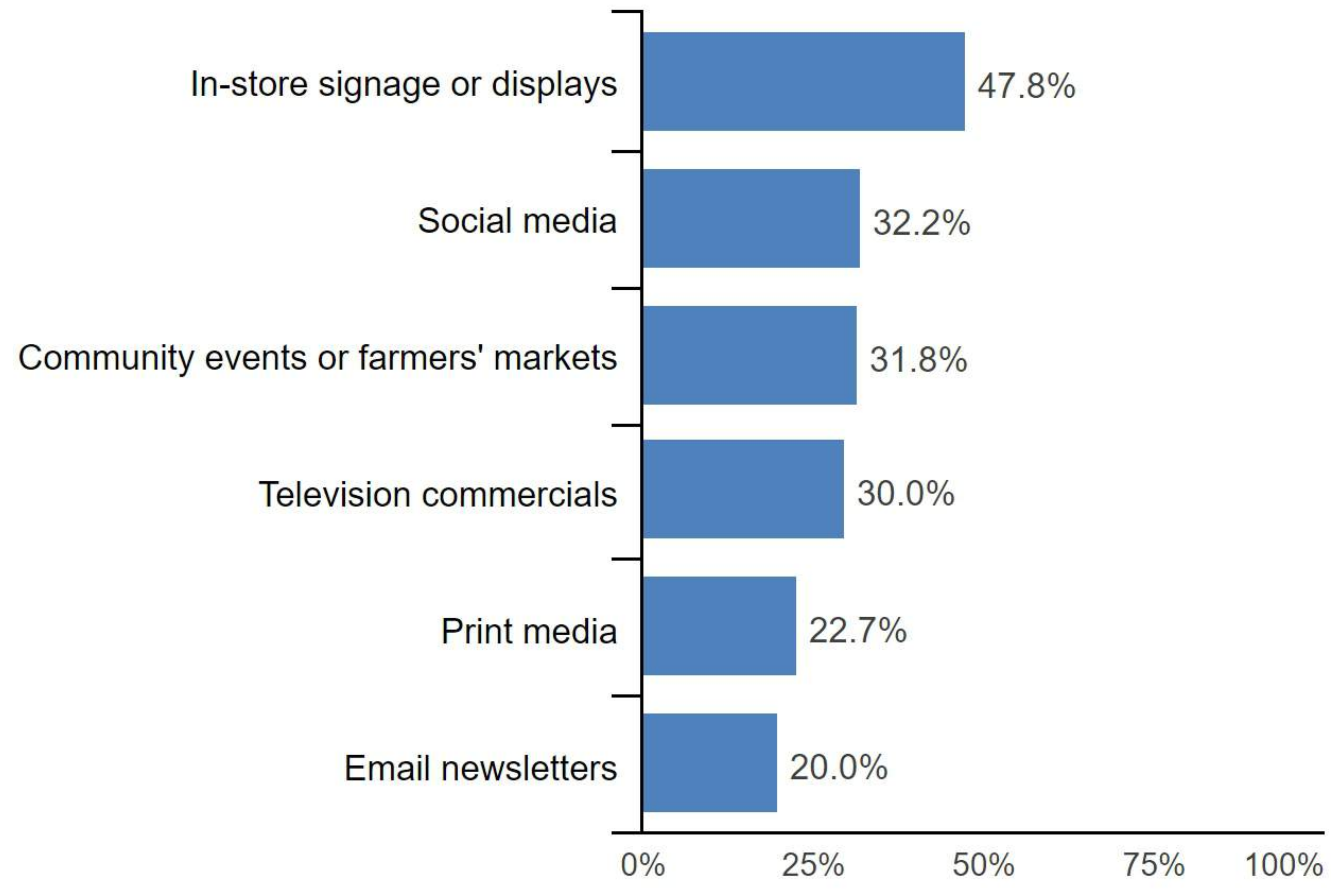
Digging Deeper

Significantly more **Non-Organic Consumers (66.7%)** reported that this information influenced their understanding of CT Organic Products *"a great deal"* compared to **Committed Organic Consumers (51.1%)** and **Occasional Organic Consumers (25.5%).**

Preferred Methods of Communication for Promotions



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Top 6 Responses Shown

Q: How much has this information influenced your understanding or purchasing of CT USDA-certified organic products?
Q: Through which communication methods would you prefer to see advertisements or promotions for CT Grown USDA-certified organic products? (Select all that apply)

Key Study Findings

Producers & Retailers

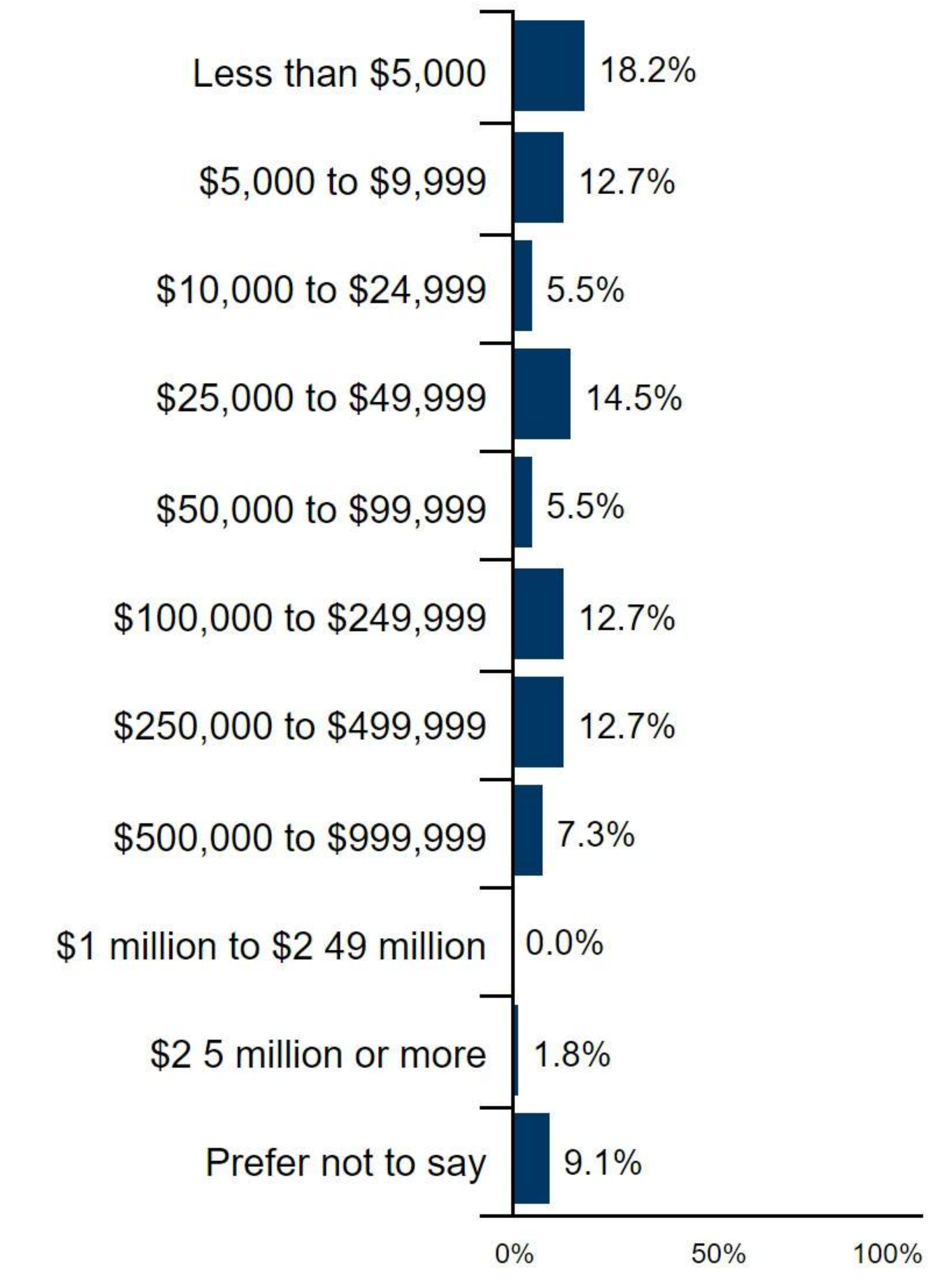
Research Methodology Snapshot | Producers & Retailers

Methodology Digital	**No. of Completes** 55	**No. of Questions** 50*	**Incentive** None	**Sample** CT DoAg Organic Producer Email Lists
Target Organic Producers in Connecticut	**Quality Assurance** Dual-level**	**Margin of Error** +/- 12.92%	**Confidence Level** 95%	**Research Dates** April 16 - May 20, 2025

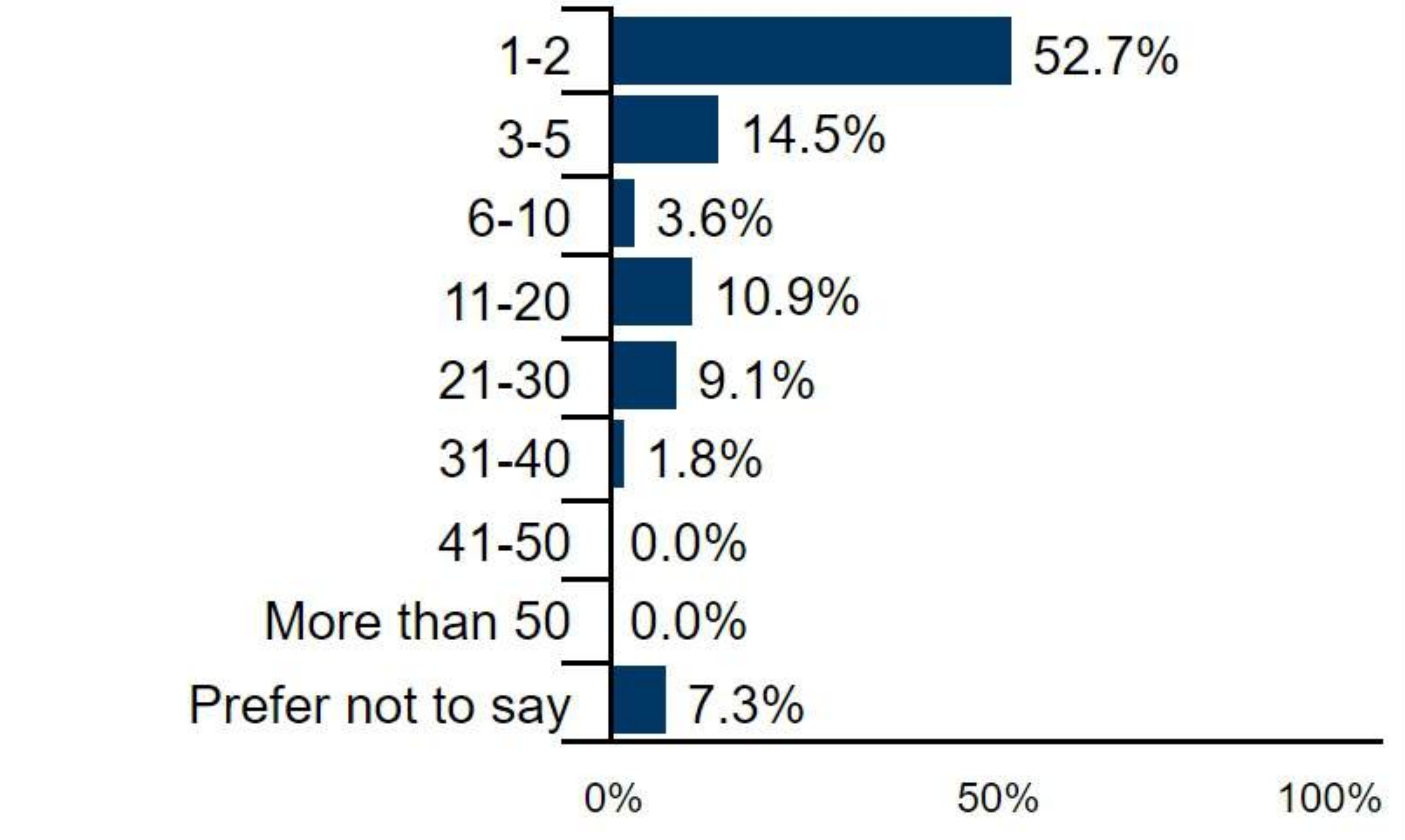
* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.
** Data quality personnel, in addition to a computer-aided interviewing platform, ensure the integrity of the data is accurate.

Respondent Profile | Producer Demographics

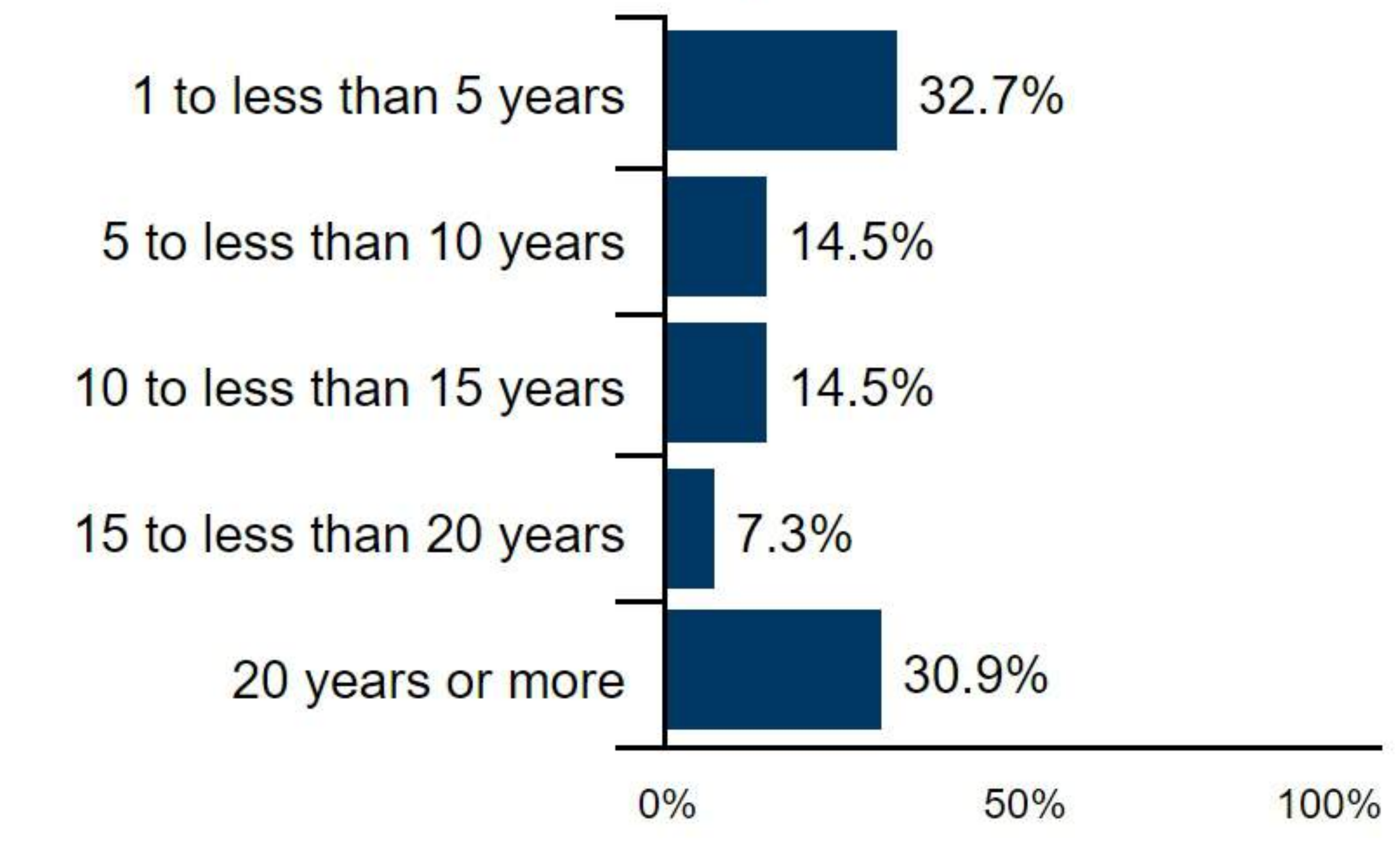
Current Annual Sales



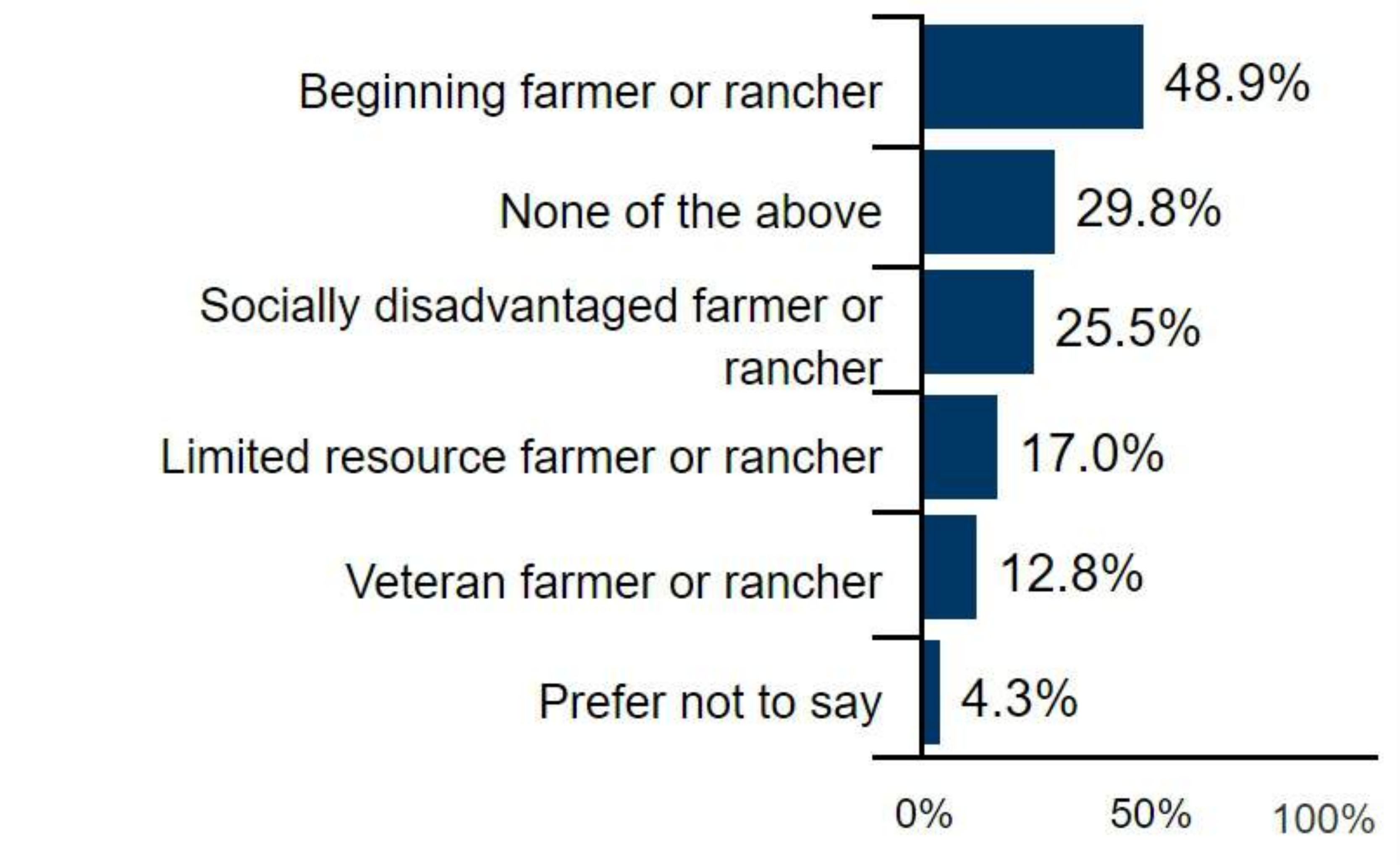
Number of Employees



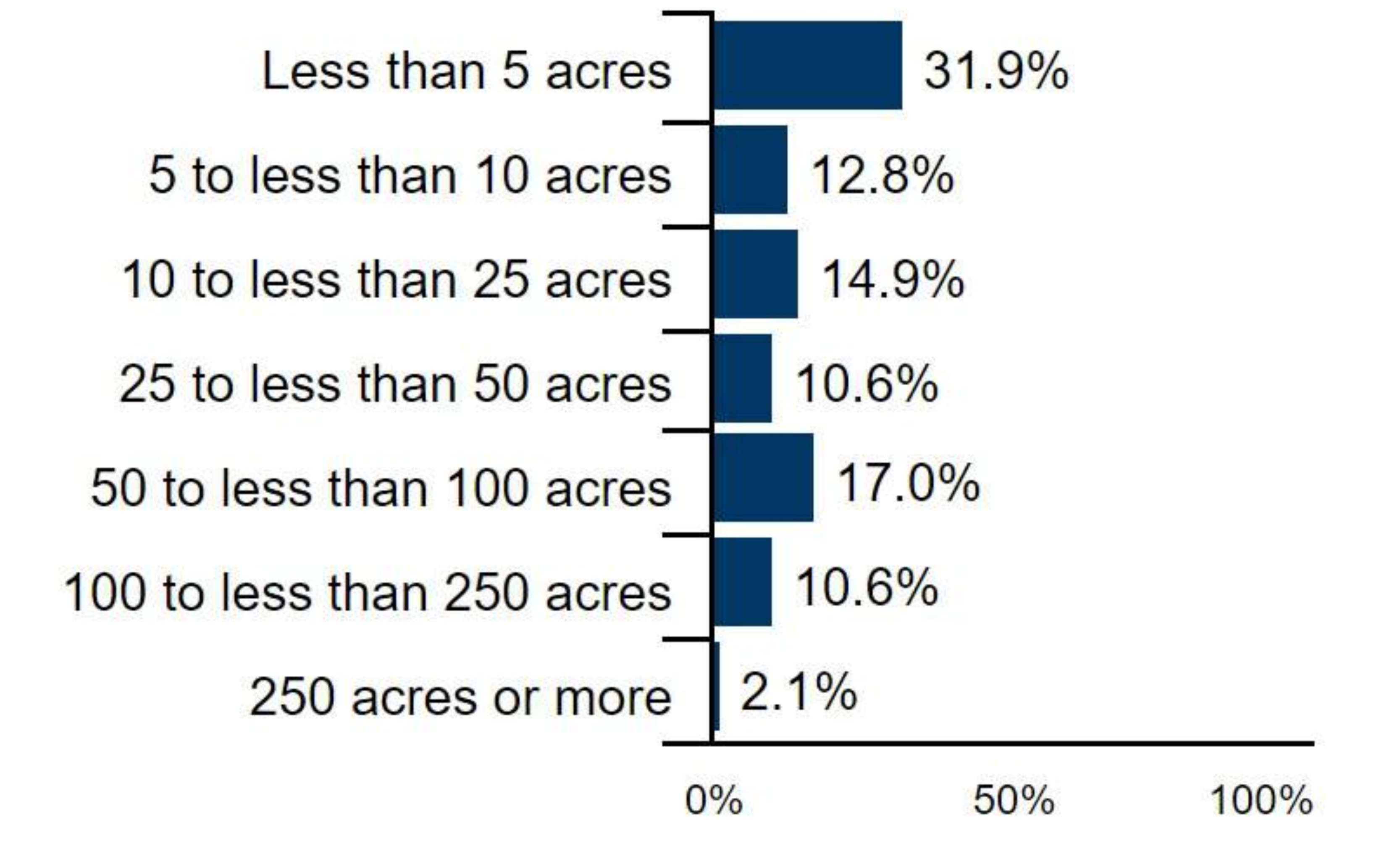
Years in Operation



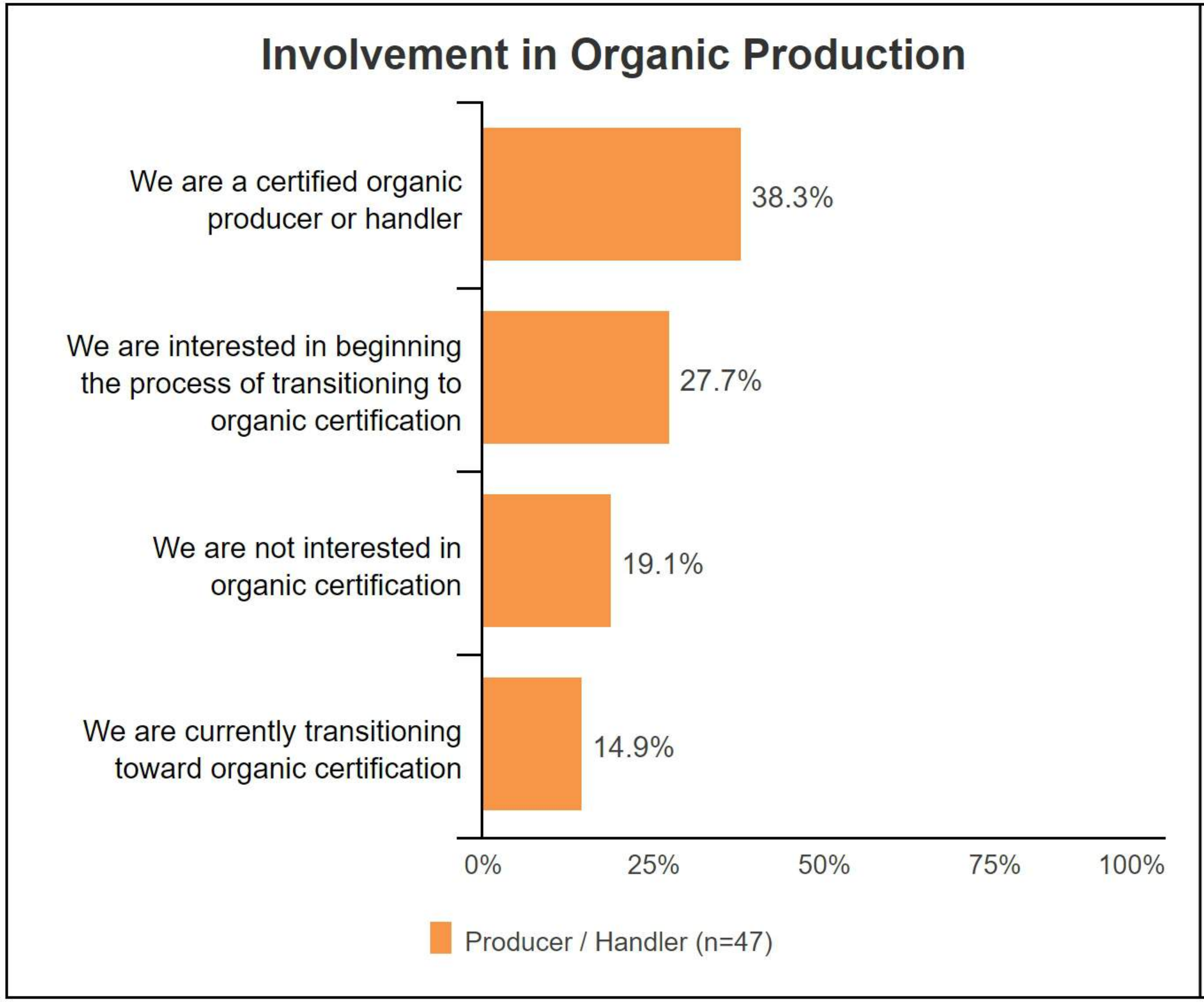
Type of Producer

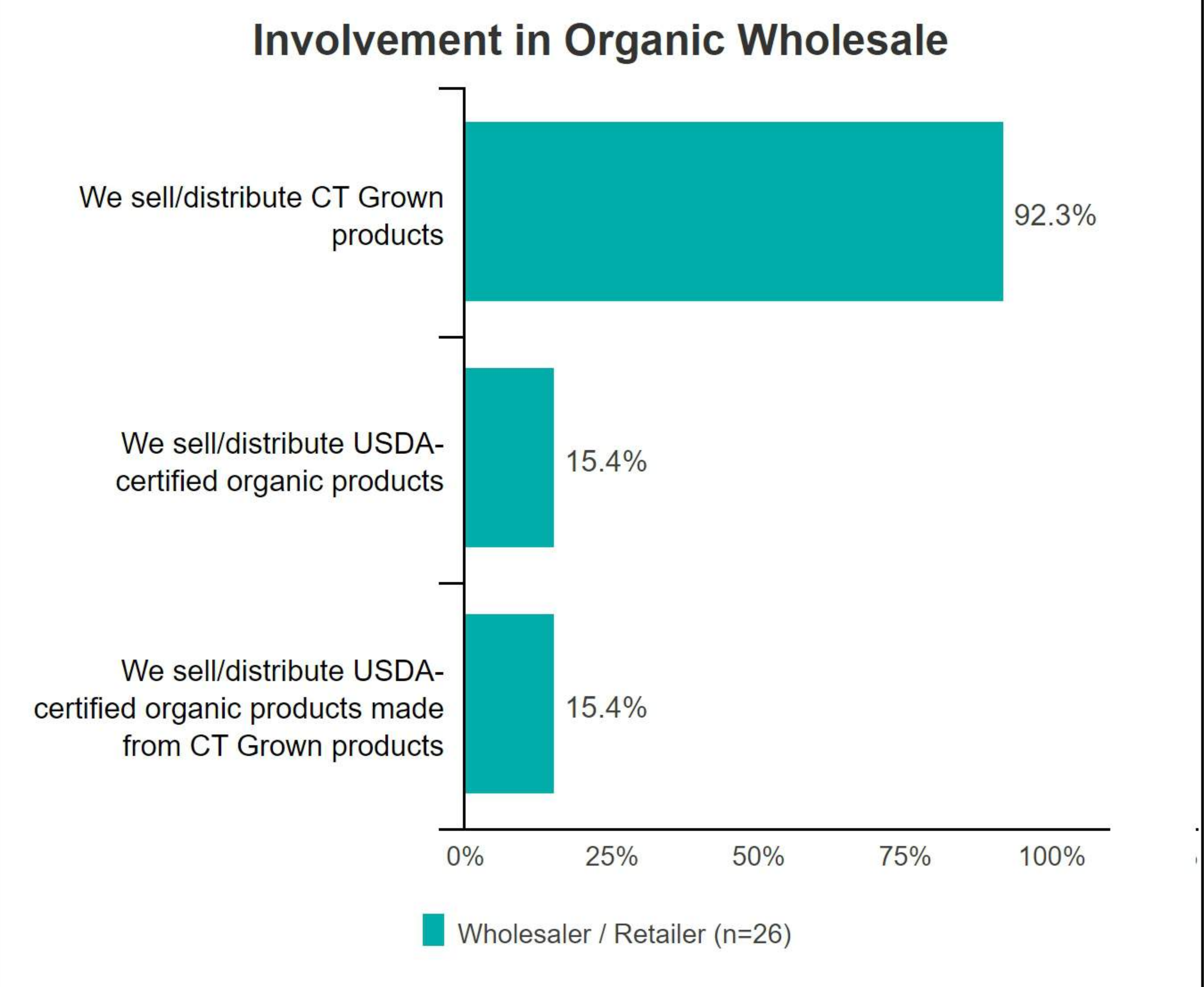


Number of Acres on Property



Respondent Profile | Current & Future Organic Involvement





Q: Which of the following best describes your current or future involvement in organic production? (Select one)
Q: Which of the following best describes your business' sales or distribution of CT-grown or USDA-certified organic products? (Select all that apply)

Key Study Findings - Producers & Retailers

Sales Channels & Marketing

- A strong majority are interested in expanding sales channels (83.6%), with top barriers including "pricing challenges" (54.3%) and "lack of connections with buyers" (52.2%).
- Over one-half of respondents (56.4%) reported seeing a current demand for organic products in their area.
- Support strategies such as "assistance connecting with buyers" (45.5%) and "consumer education on CT Grown benefits" (41.8%) were cited to improve access.
- Most respondents are open to adopting new marketing strategies (87.3%), especially "social media campaigns" (63.6%) and "collaborative promotions" (54.5%).
- Nearly one-half identified "increased digital presence" (49.1%) and "direct outreach to consumers" (47.3%) as helpful marketing tools.
- When asked about representation and support from the CT Grown brand, over two-fifths of respondents (43.6%) were unsure how well their business was represented, while over one-third (36.4%) felt supported.
- However, nearly two-fifths of respondents (38.2%) reported that the "CT Grown Logo" is "helpful" in their marketing efforts.

Producers

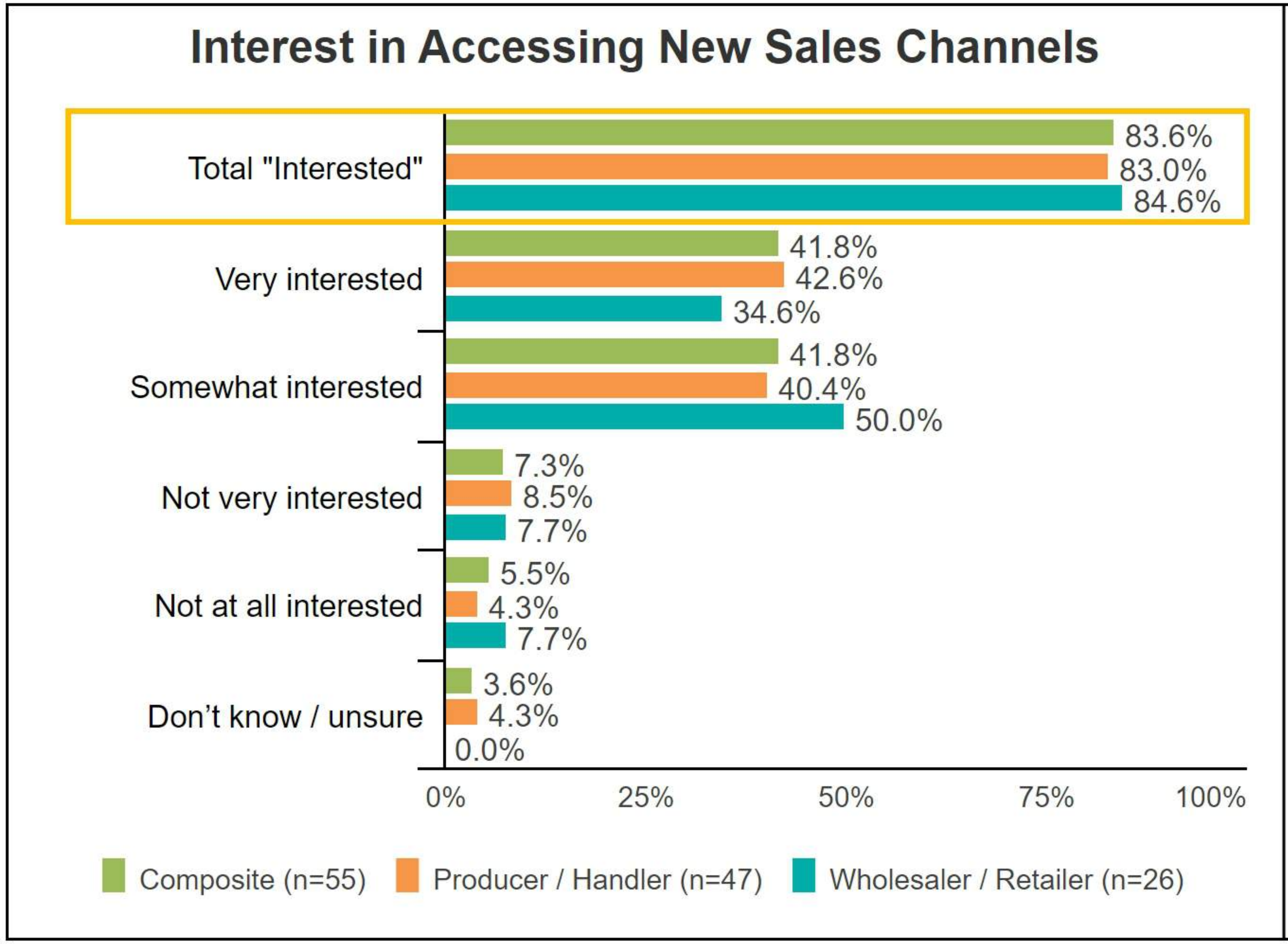
- Environmental sustainability (64.0%) and consumer demand (52.0%) were the top reasons for pursuing organic certification.
- All certified organic producers grow vegetables (100.0%), and most also grow herbs (88.9%); two-thirds reported that all their CT Grown products are certified organic (66.7%).
- Respondents who do not currently hold organic certification cited "cost of certification" as the primary barrier (65.0%), while an equal proportion (65.0%) reported that "financial incentives or grants" would make it easier to pursue certification.
- Most currently use "CSA's" (77.8%), "farm stands" (66.7%), and/or "farmer's markets" (66.7%) to sell organic products, with high satisfaction for "farm stand" (82.9%) and "farmer's market" (81.0%) channels.
- A majority of producers promote their organic branding through "social media" (94.1%), "farm website or online store" (88.2%), and "word of mouth" (82.4%).

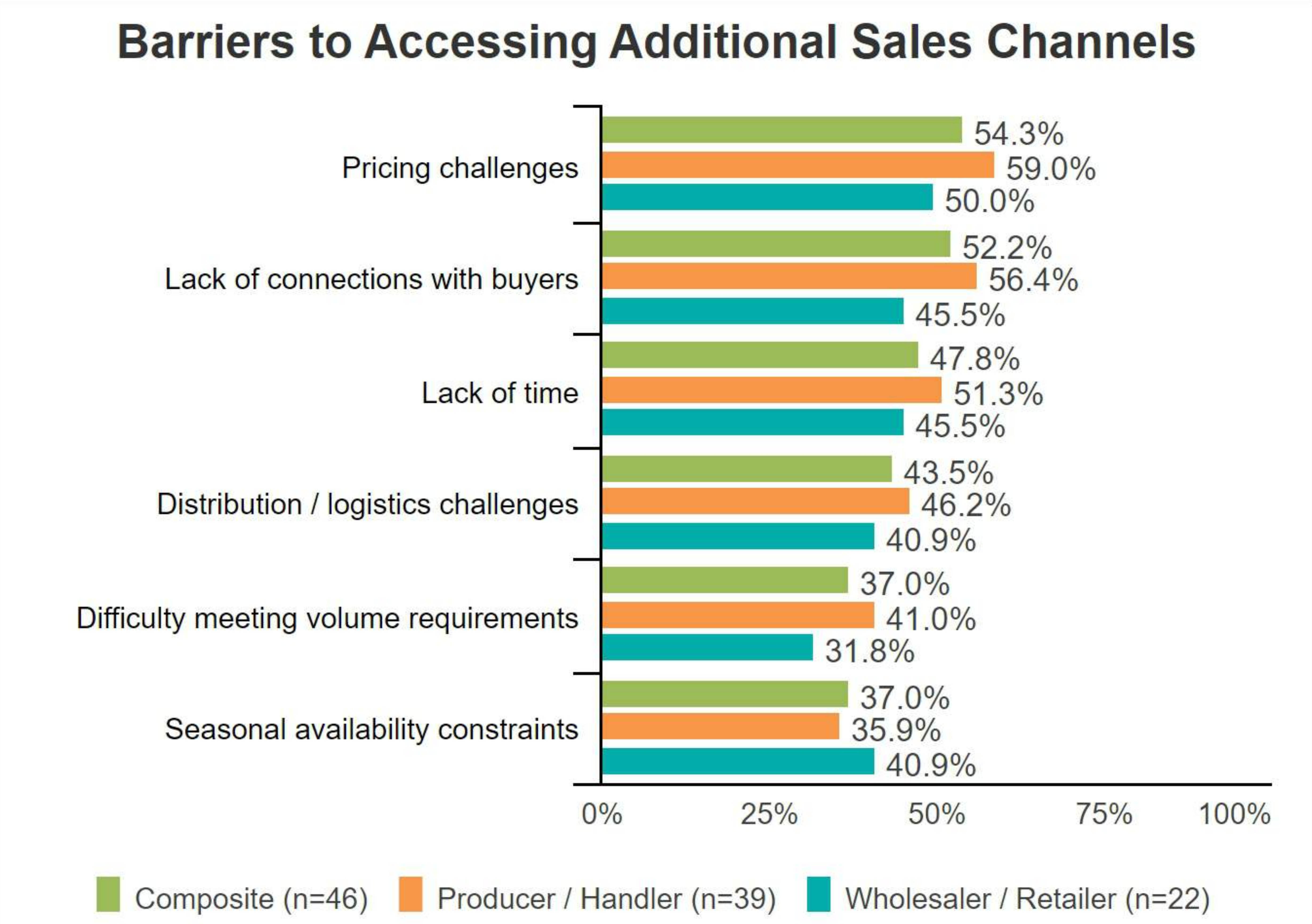
Retailers / Wholesalers

- Nearly half report "moderate demand" for organic products (46.2%), with 55.6% interested in selling more.
- Retailers primarily sell organic "herbs" (85.7%), "vegetables" (71.4%), and "fruits" (71.4%), with 42.9% sourcing all their organic products from CT farms.
- Barriers to selling more organic products include "higher product costs" (38.5%) and "regulatory challenges" (30.8%); while another 30.8% reported facing no challenges.
- Most use "digital promotions" (94.1%) and "in-store signage" (58.8%) to market organic products, with over one-third using messaging like "farm identity / transparency / shop local" (35.3%).

Sales Channels | Interest & Barriers

Over eight-out-of-ten of all respondents expressed interest in accessing new sales channels, with both producers and retailers showing equally strong interest. The most common barriers to expansion included "pricing challenges" and a "lack of connections with buyers," noted by more than half of respondents. Of note, two-fifths of retailers cited the barrier "seasonal availability constraints," slightly more compared to producers (+5.0 percentage points).





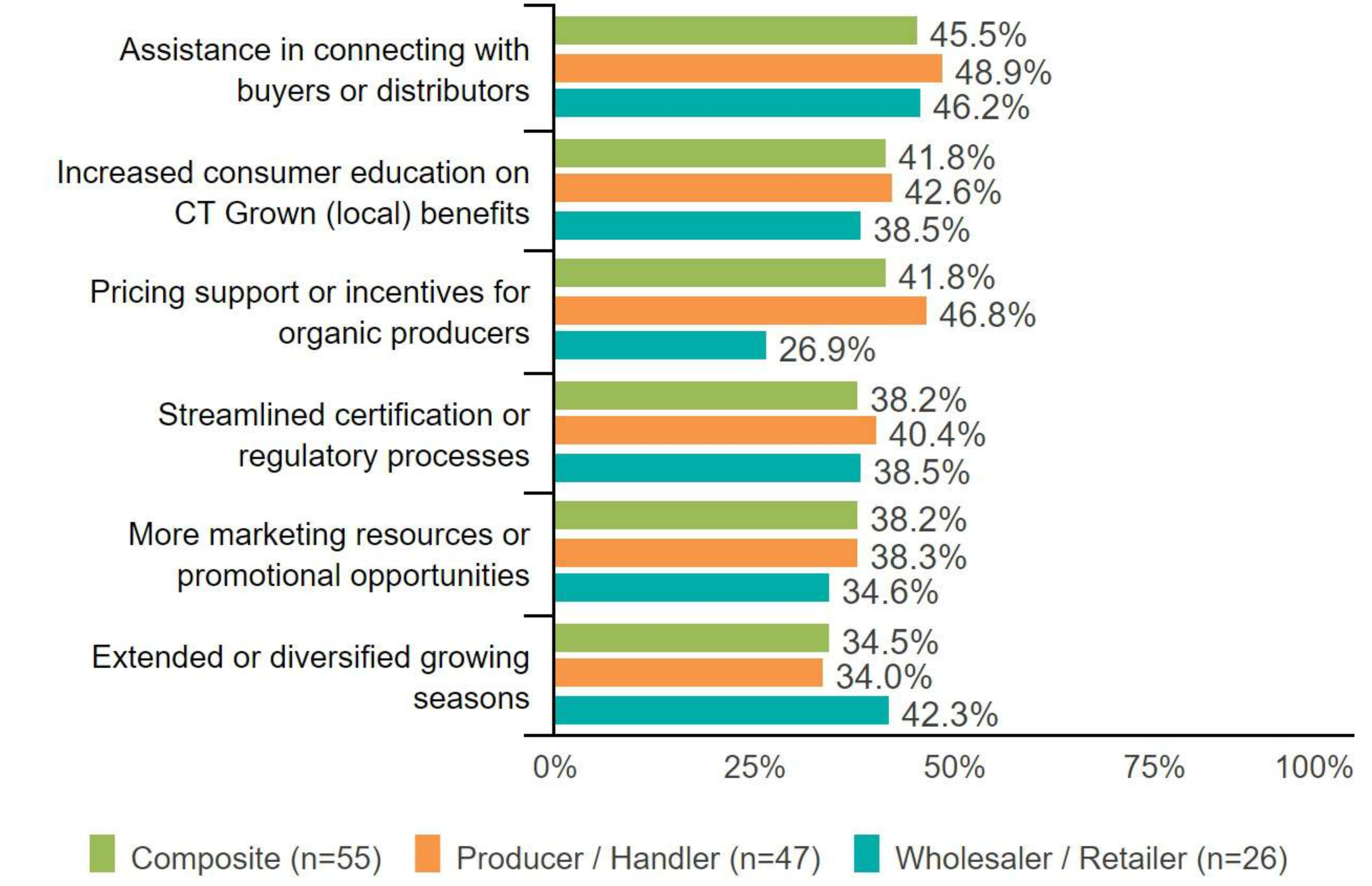
Top 6 Responses Shown

Q: How interested are you in accessing new or additional sales channels for your products?
Q: What barriers do you face in accessing additional sales channels? (Select all that apply)

Sales Channels | Demand & Access

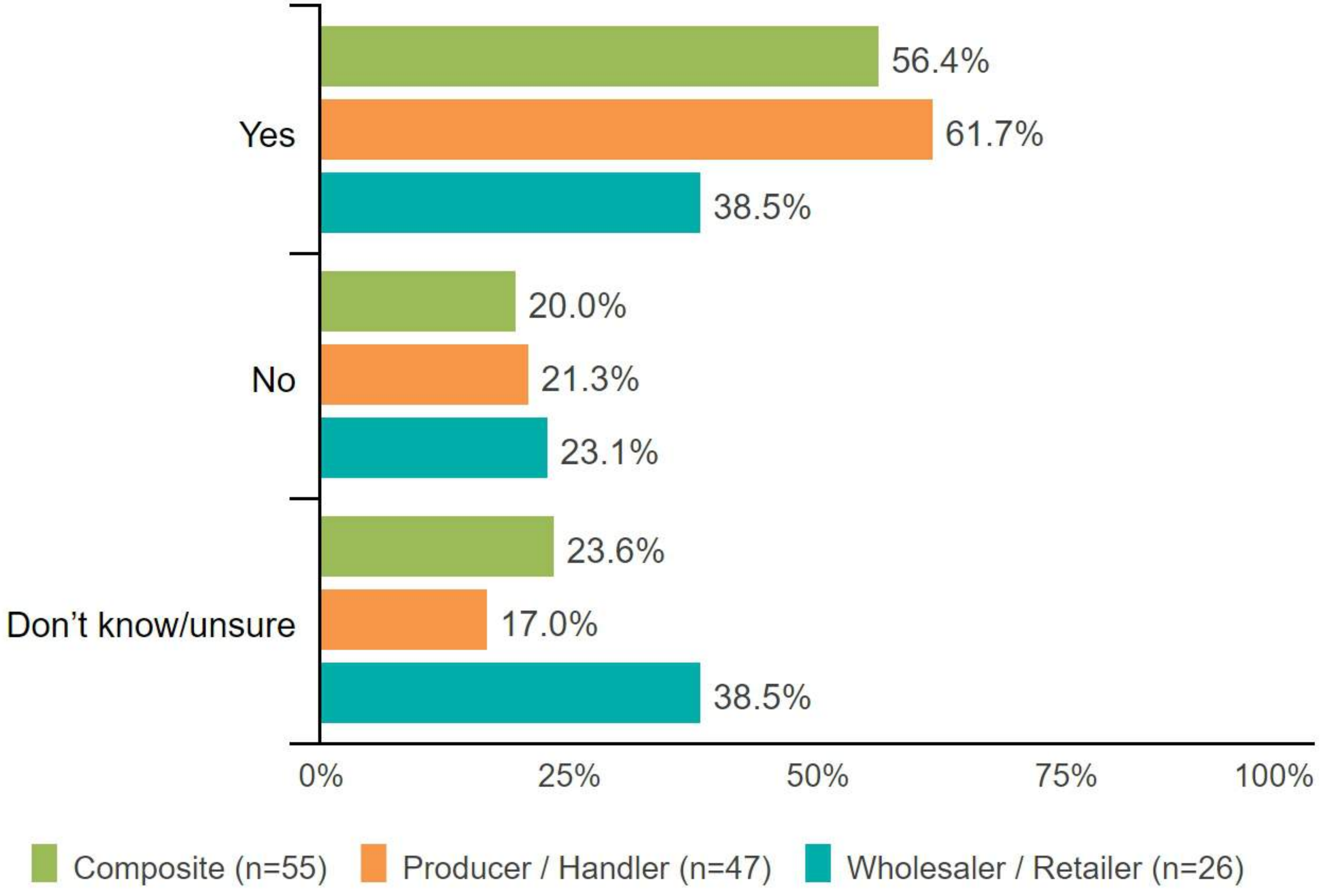
Over two-fifths of respondents indicated that "assistance in connecting with buyers or distributors" and/or "increased consumer education on CT Grown (local) benefits" would help improve access to additional sales channels. When asked about the current demand for organic products in their area, more than one-half of all respondents reported existing demand, including three-fifths of producers. However, it is important to note, over one-third of retailers were unsure whether there was demand for organic products in their area.

Solutions to Improve Access to Additional Sales Channels



Top 6 Responses Shown

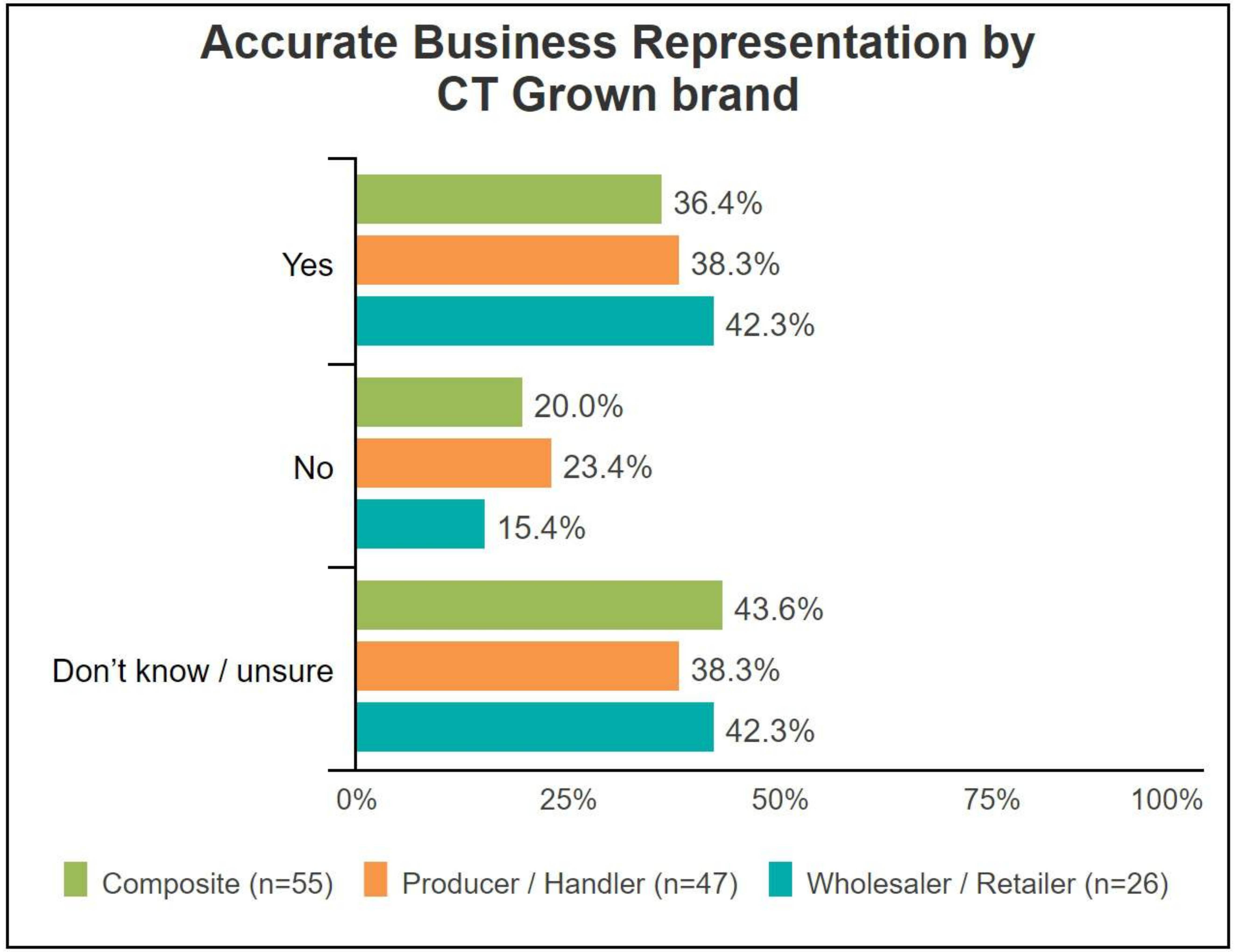
Current Demand for Organic Products



Q: What would help improve access to additional sales channels? (Select all that apply)
Q: In general, do you see a current demand for organic products in your area?

Marketing | CT Grown Brand & Logo Usefulness

Over one-third of respondents felt their business is accurately represented and supported by the CT Grown brand, while more than two-fifths expressed uncertainty. When asked about the helpfulness of various logos in their marketing efforts, nearly two-fifths of all respondents found the "CT Grown logo" to be helpful, including one-half of retailers. Notably, more respondents found the "CT Grown logo" to be helpful compared to the "USDA Certified Organic logo" (+10.9 percentage points).



Helpfulness of Logo's in Marketing

	Composite	Producer / Handler	Wholesaler / Retailer
CT Grown Logo	38.2%	38.3%	50.0%
USDA Certified Organic Logo	27.3%	29.8%	23.1%
Grown ConNECTed (Northeast CT)	16.4%	17.0%	15.4%
CT Grown for Veterans	1.8%	0.0%	3.8%
Farm-to-Table Northwestern CT	1.8%	2.1%	3.8%

Aggregate of ratings 4 and 5, 5 being "Very helpful" *n=55*

Q: Do you feel your business (farm, retail store, or wholesale operation) is accurately represented and supported by the CT Grown brand?
Q: How helpful have the following logos been in your marketing efforts?

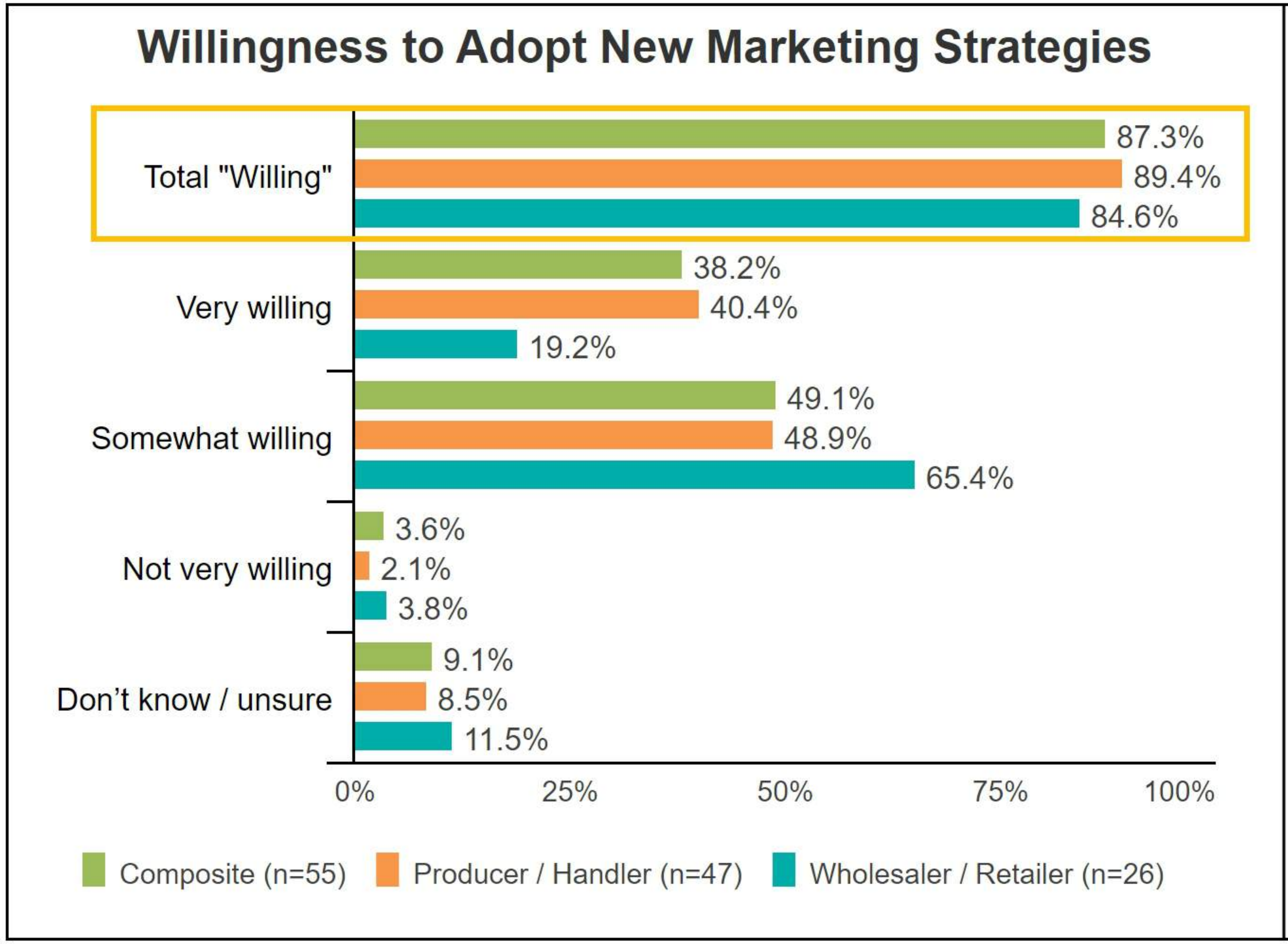
Marketing | Strategies to Expand Marketing Efforts

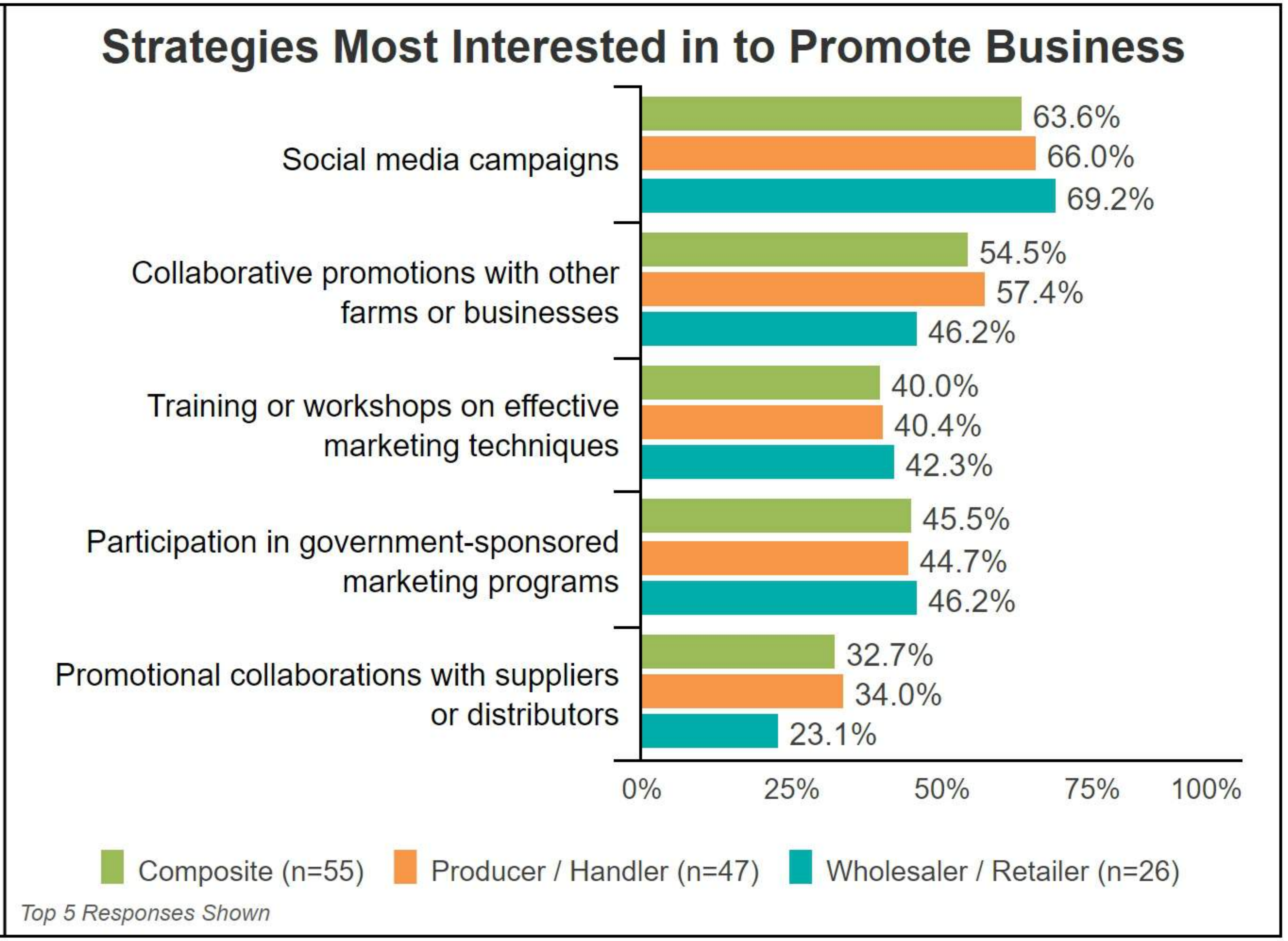
Nearly one-half of all respondents indicated that "increased digital presence" and "direct outreach to consumers" would be helpful in expanding their marketing or sales efforts. Notably, more than one-quarter of retailers identified "participation in more farmers' markets' as beneficial, which was 5.6 percentage points higher than producers. However, more producers found collaboration with other farms/businesses to be beneficial (+8.5 percentage points).

Q: What strategies would help you expand your marketing or sales efforts?

Marketing | Interest in New Strategies

Over eight-out-of-ten of all respondents expressed willingness to adopt new marketing strategies for their business, including nearly nine-out-of-ten producers. Nearly two-thirds of all respondents showed interest in implementing "social media campaigns" to promote their business, followed by more than one-half who were interested in "collaborative promotions with other farms or businesses." This collaboration was, again, a greater emphasis among producers (+11.2 percentage points).





Q: How willing are you to adopt new marketing strategies for your business?
Q: Which of the following marketing strategies would you be most interested in using to promote your business?

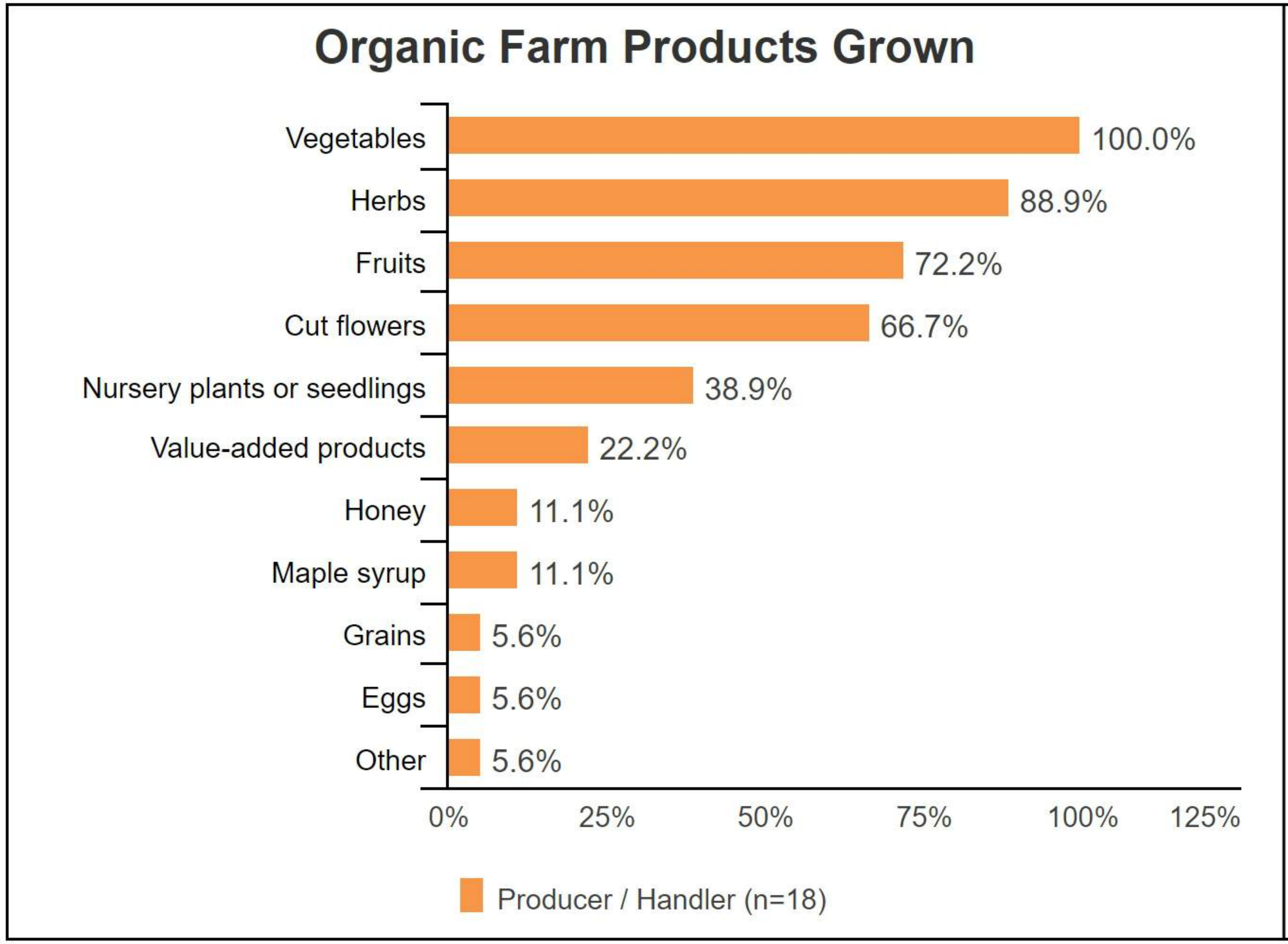
Production | Motivators to Transition

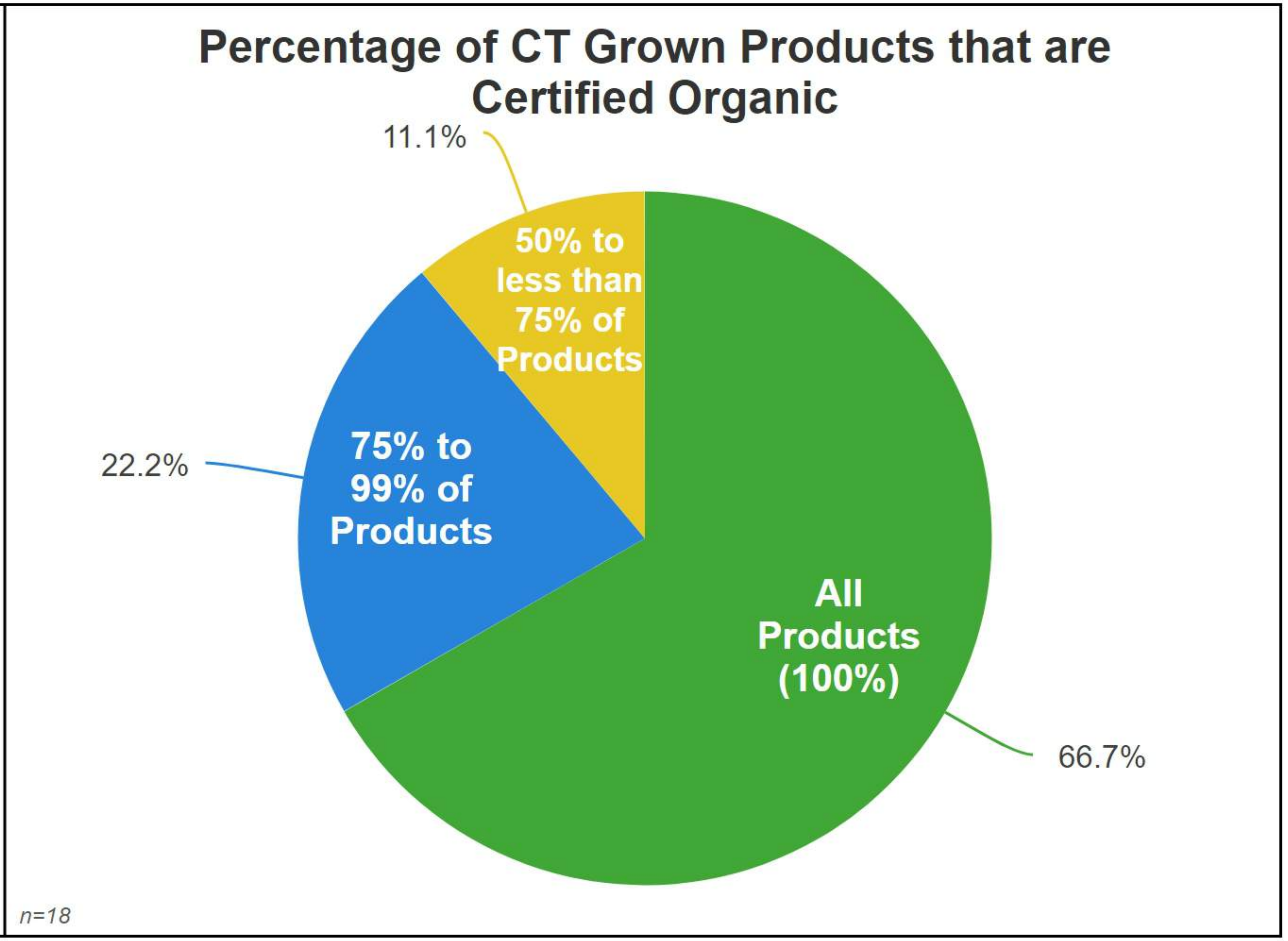
Nearly two-thirds of producers who are certified organic or currently pursuing certification reported that "environmental or sustainability benefits" influenced their decision to transition. One-half cited "consumer demand for organic products" as a motivating factor, while two-fifths cited "increased market opportunities" as a key influence in their decision, reflecting the demand they see in their market.

Q: What factors influenced your decision to transition to organic product production? (Select all that apply)

Production | Volume of Certified Organic Products

Among certified organic producers, all reported growing organic vegetables, followed by nearly nine-out-of-ten who grow organic herbs. Two-thirds of these producers indicated that "100%" of their CT Grown products are certified organic, while nearly one-quarter reported that between "75% and 99%" of their products are certified organic.

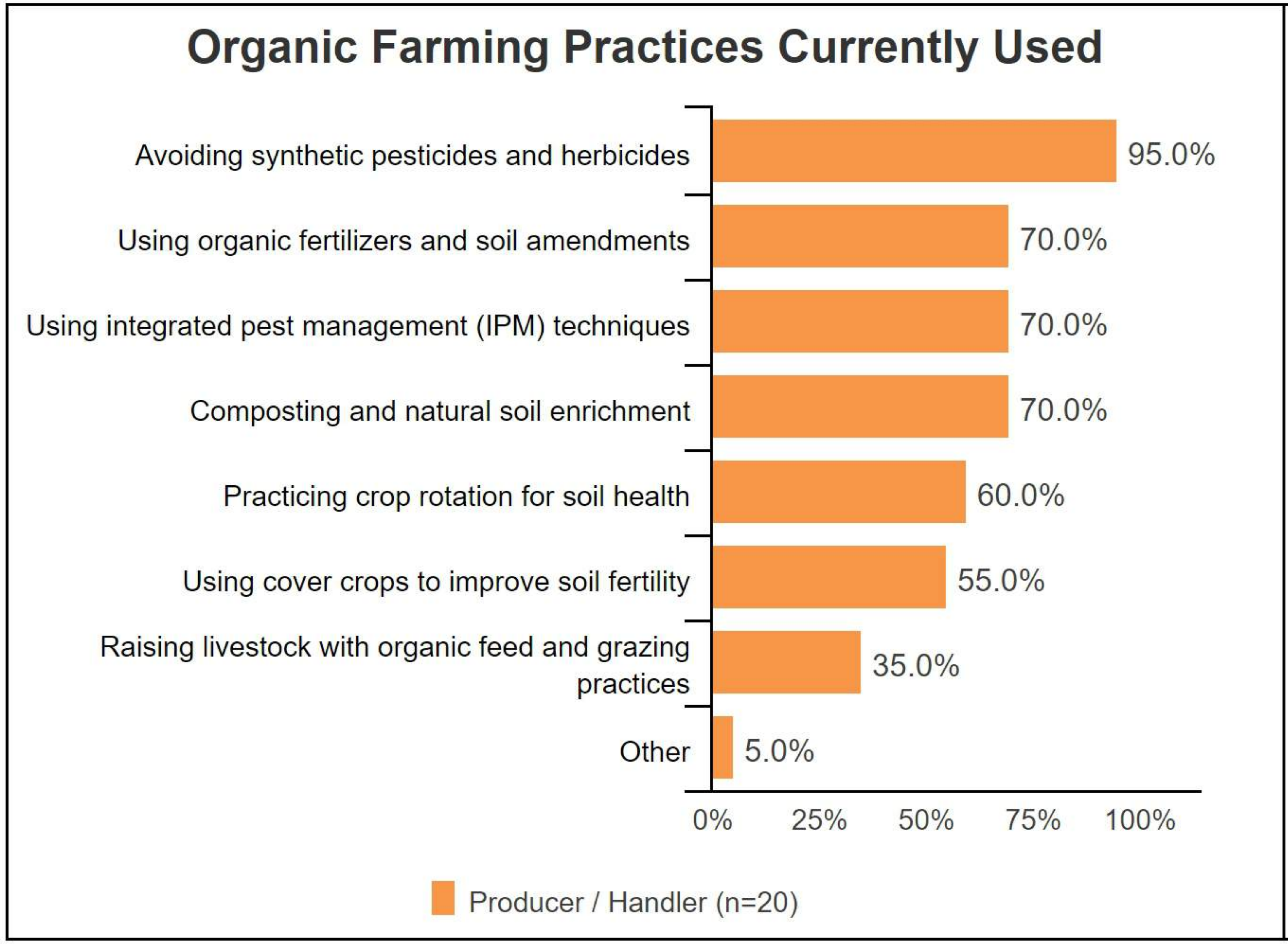


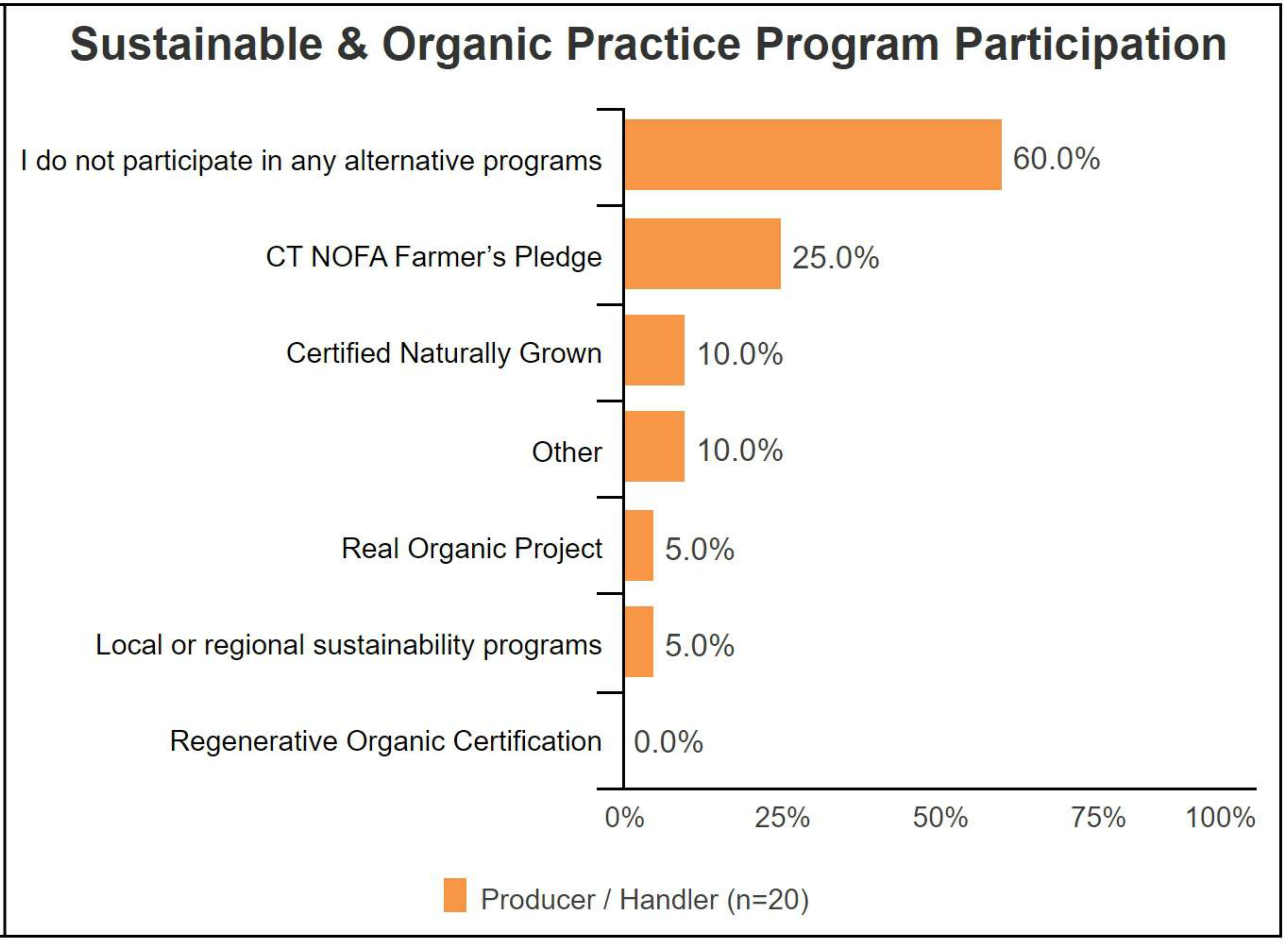


Q: Which of the following organic farm products do you grow and/or produce? (Select all that apply)
Q: What percentage of your CT Grown products are certified organic?

Production | Farming Practices Used

Of the producers who are currently transitioning or are interested in organic certification, the majority reported that they still followed certain organic practices including: "avoided synthetic pesticides and herbicides," using "organic fertilizers and soil amendments," "integrating pest management (IPM) techniques," and/or "composting and natural soil enrichment." Notably, three-fifths of these producers reported not participating in any alternative programs outside of the USDA Certified Organic program, while one-quarter participate in the "CT NOFA Farmer's Pledge."

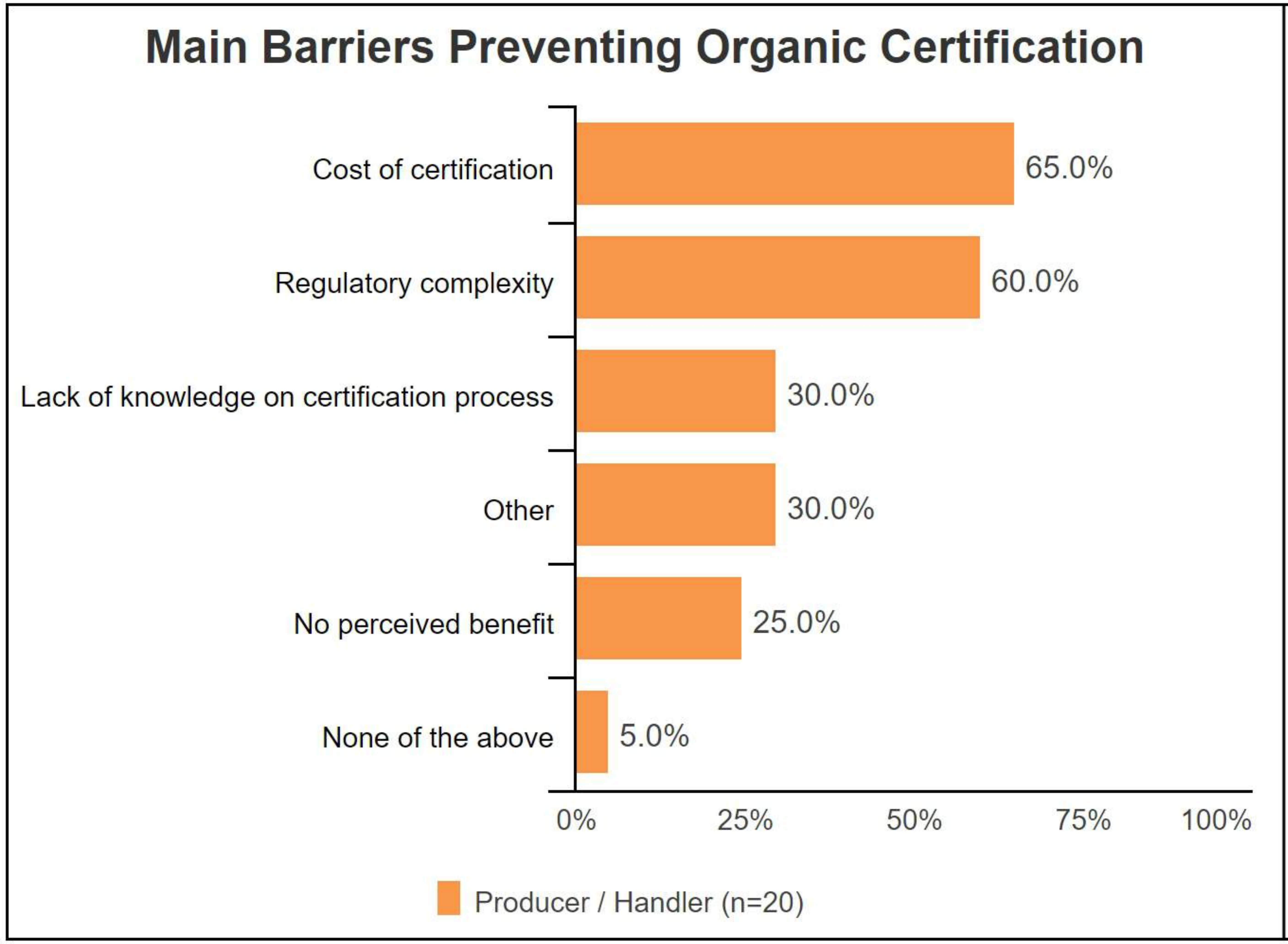


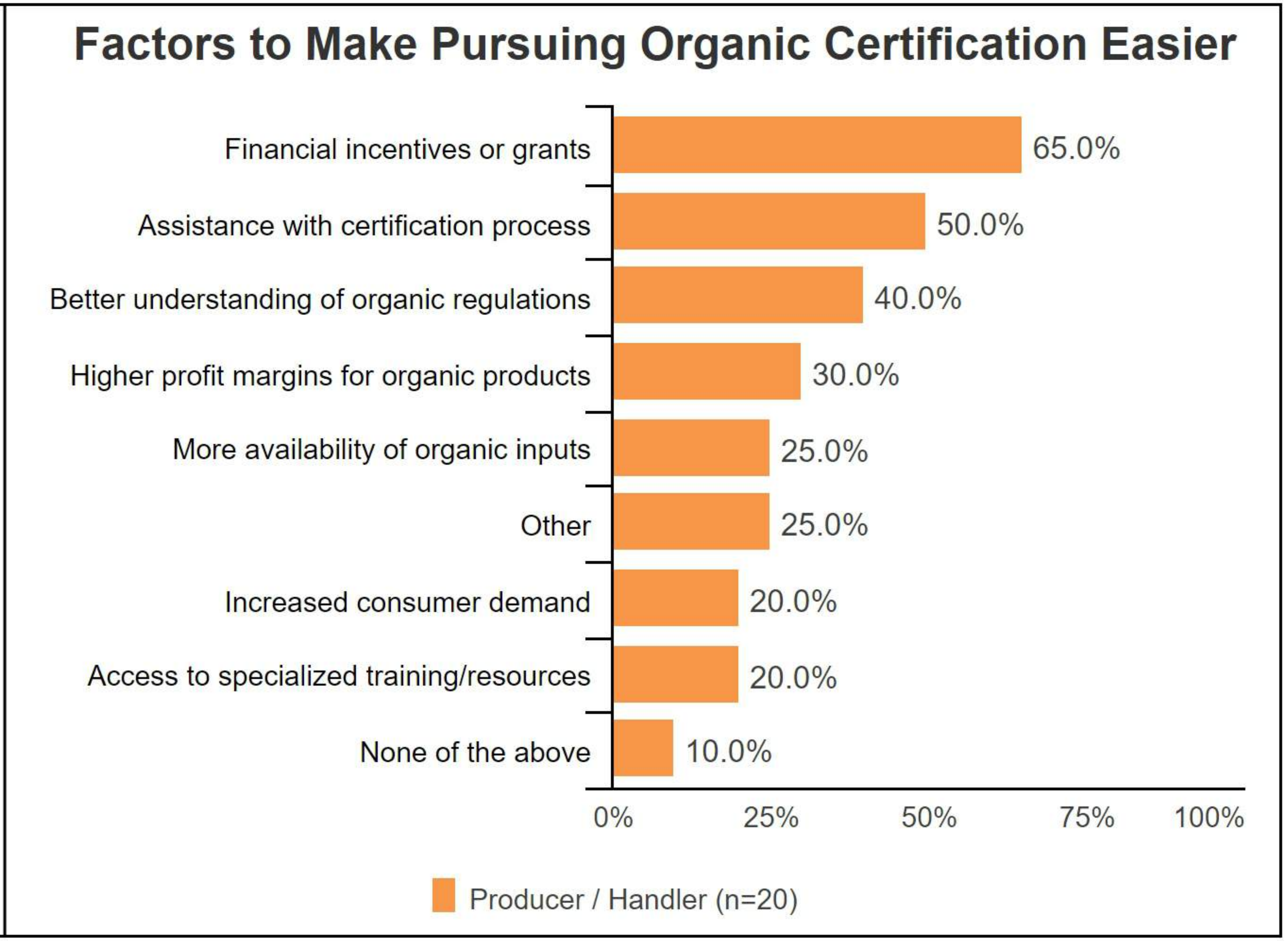


Q: Which organic farming practices are you currently using? (Select all that apply)
Q: Do you participate in any programs that promote the use of sustainable and organic practices, but are separate from the USDA Certified Organic program? (Select all that apply)

Production | Drivers & Barriers to Organic Certification

Of the producers who are currently transitioning or are interested in organic certification, over three-fifths cited "cost of certification" and "regulatory complexity" as barriers that have prevented or are preventing them from pursuing certification. Similarly, over two-fifths of these producers reported that "financial incentives or grants" would help, while one-half cited "assistance with the certification process" as something that would make it easier to pursue organic certification.

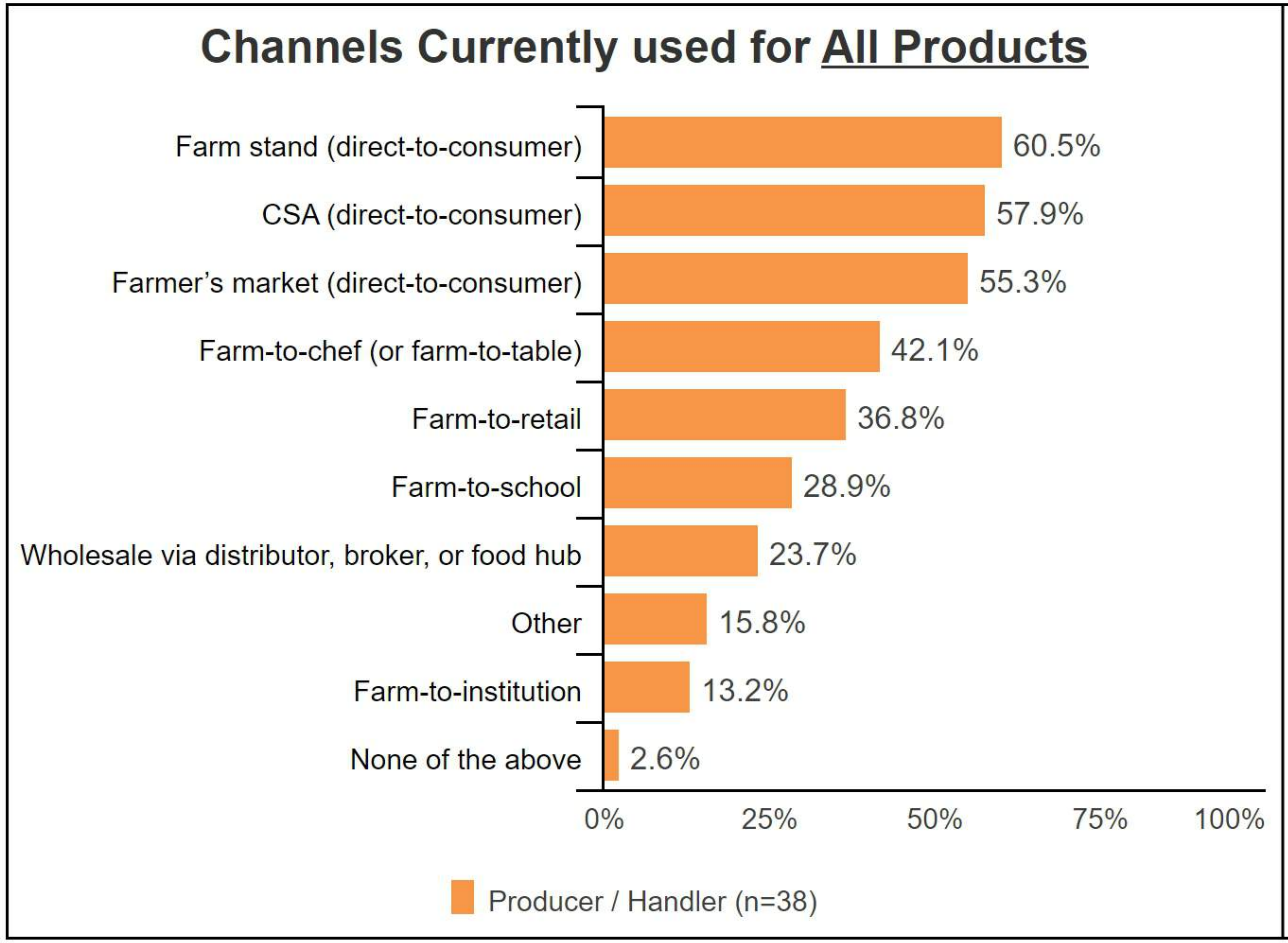


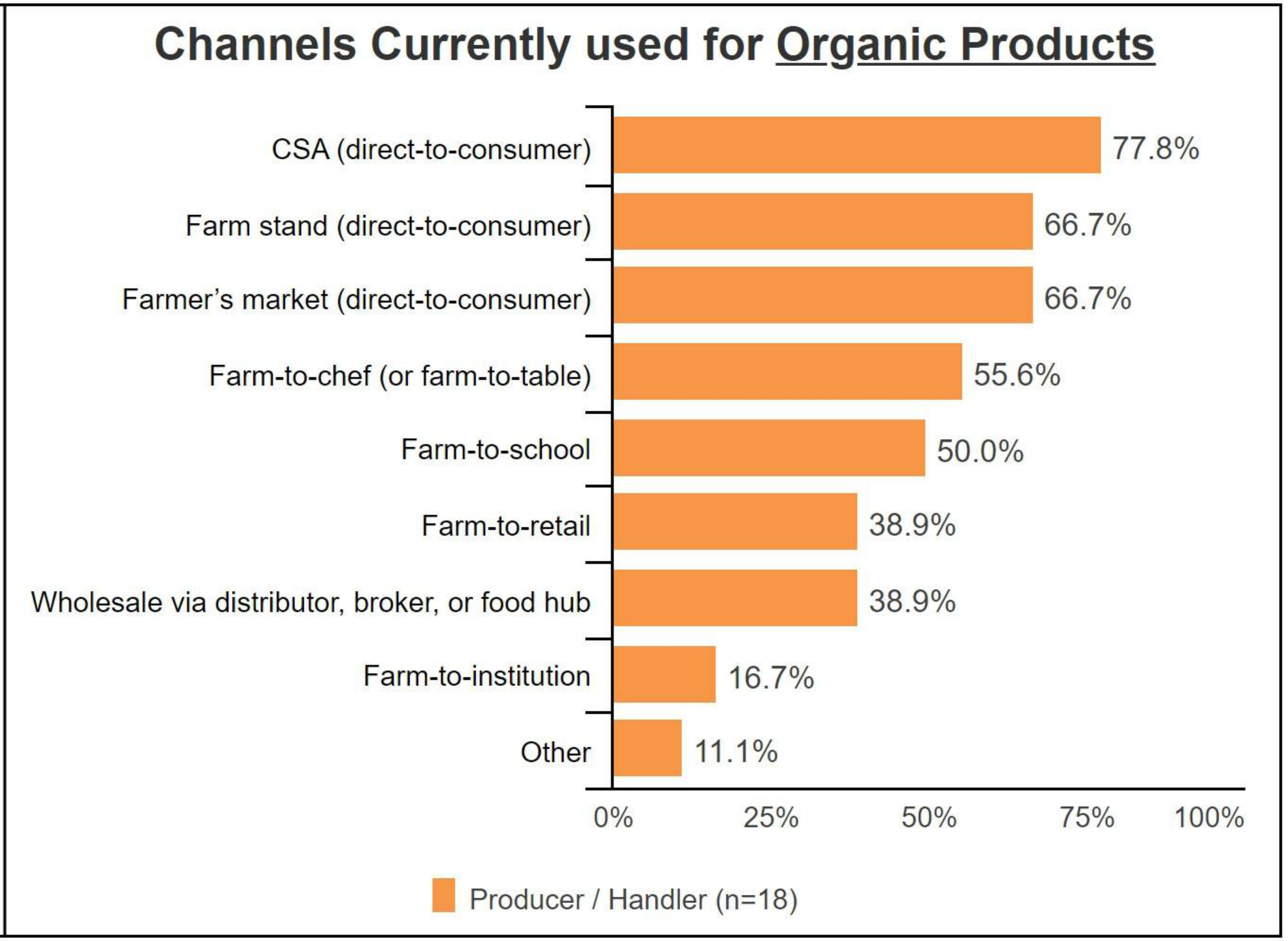


Q: What were or are the main barriers preventing you from pursuing organic certification? (Select all that apply)
Q: What factors would make it easier to pursue organic certification? (Select all that apply)

Production | Channels Used for Products

Three-fifths of all producers reported currently using "farm stands" to sell **all their agricultural products**, followed by over one-half who use "CSAs (Community Supported Agriculture)" programs and/or "farmer's markets." Among certified organic producers, more than three-quarters use "CSAs" channels to sell their **organic products**, followed by two-thirds who utilize "farm stands" and/or "farmer's markets"





Q: Through which channels do you currently sell all your agricultural products? (Select all that apply)
Q: Through which channels do you currently sell your organic agricultural products? (Select all that apply)

Production | Channels Used for Products

Eight-out-of-ten producers who use "farm stand" sales channels reported being satisfied overall, with a similar proportion expressing satisfaction with the "farmer's market" channel. Notably, while nearly three-quarters of producers who use the "CSA" sales channel reported being satisfied, nearly one-quarter indicated they were "not very satisfied" with this avenue for sales.

Satisfaction with Sales Current Channels

	Total "Satisfied"	Very satisfied	Somewhat satisfied	Not very satisfied	Not at all satisfied	Don't know/unsure
Farm stand (direct to consumer)	82.6%	17.4%	65.2%	17.4%	0.0%	0.0%
Farmer's market (direct to consumer)	81.0%	42.9%	38.1%	14.3%	4.8%	0.0%
Wholesale via distributor, broker, or food hub	77.8%	33.3%	44.4%	11.1%	0.0%	11.1%
CSA (direct to consumer)	72.7%	22.7%	50.0%	22.7%	0.0%	4.5%
Other (please specify)	66.7%	16.7%	50.0%	0.0%	16.7%	16.7%
Farm-to-chef (or farm-to-table)	56.3%	12.5%	43.8%	25.0%	0.0%	18.8%
Farm-to-retail	50.0%	0.0%	50.0%	28.6%	0.0%	21.4%
Farm-to-school	45.5%	0.0%	45.5%	36.4%	9.1%	9.1%
Farm-to-institution	40.0%	0.0%	40.0%	20.0%	20.0%	20.0%

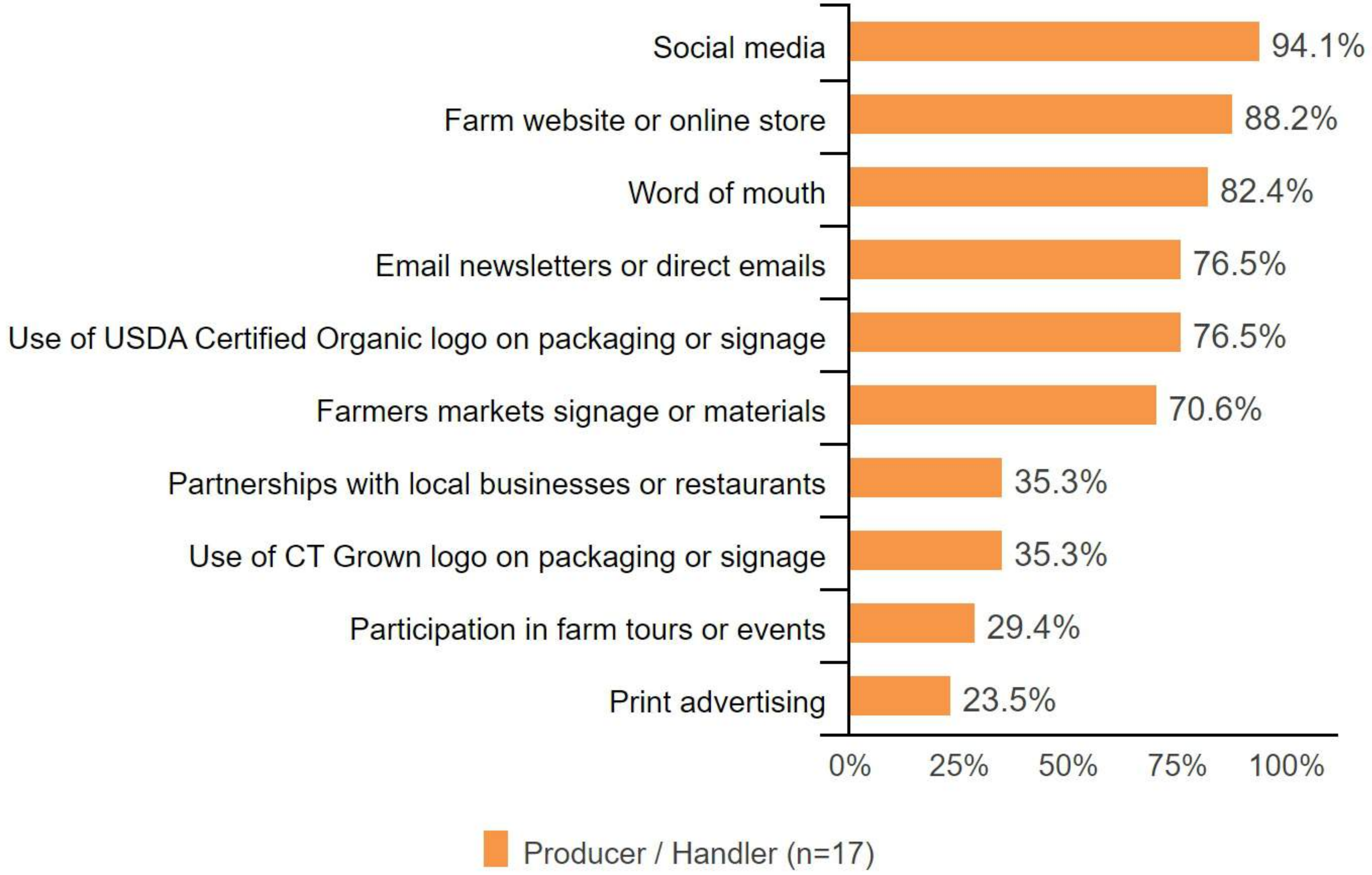
n=38

Q: How satisfied are you with your current sales channels?

Production | Organic Product Promotion

Of the certified organic producers, a majority reported actively promoting their certified organic products or branding through "social media," followed by eight-out-of-ten who utilize a "farm website or online store" and/or "word of mouth" as part of their marketing strategy. Two-fifths of these producers reported incorporating their certified organic products into promotional efforts by simply "consistently mentioning or highlighting certification in communications."

Methods of Promoting Organic Products & Branding



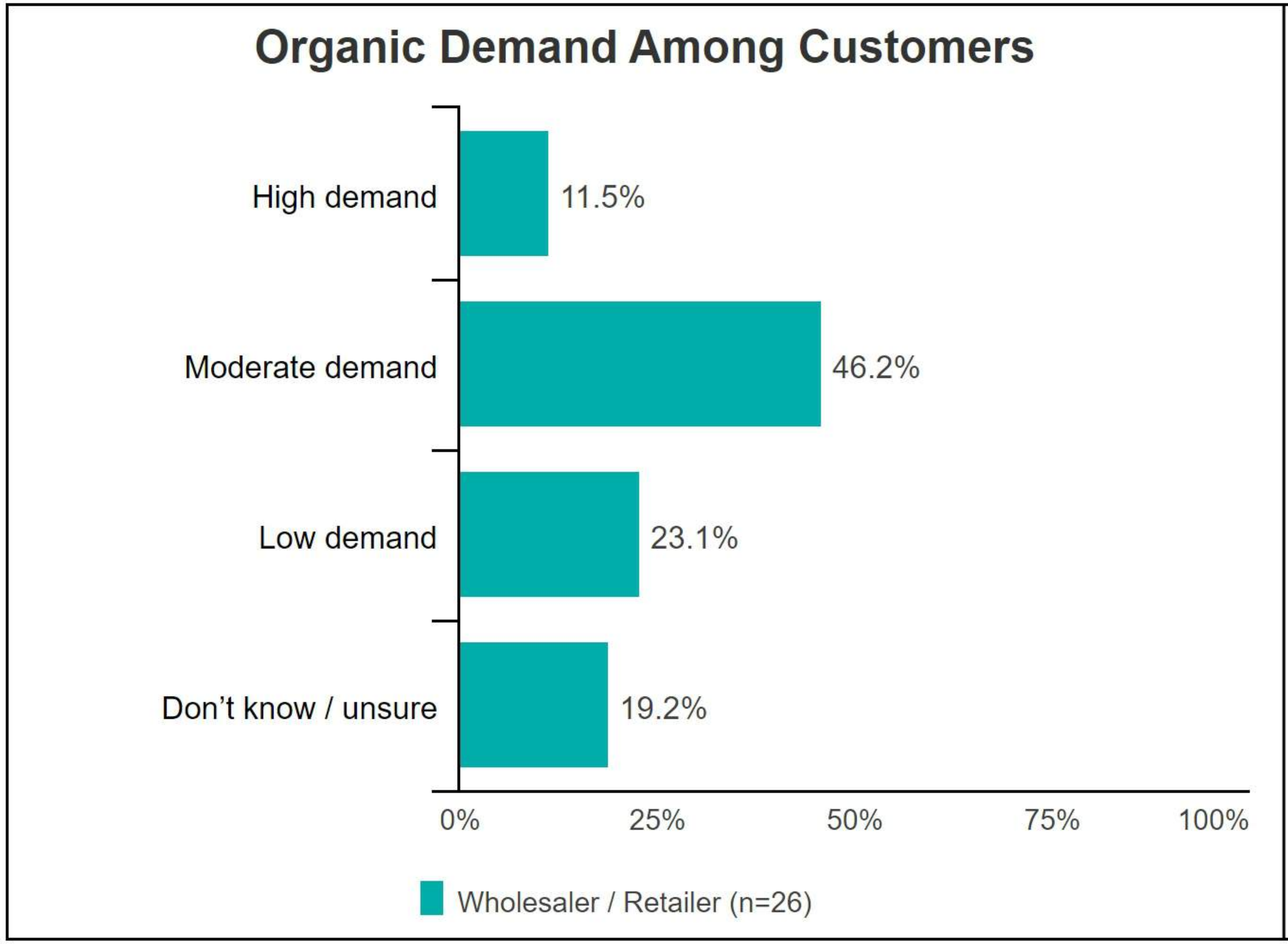
Incorporation of Certified Organic Products in Promotion Efforts

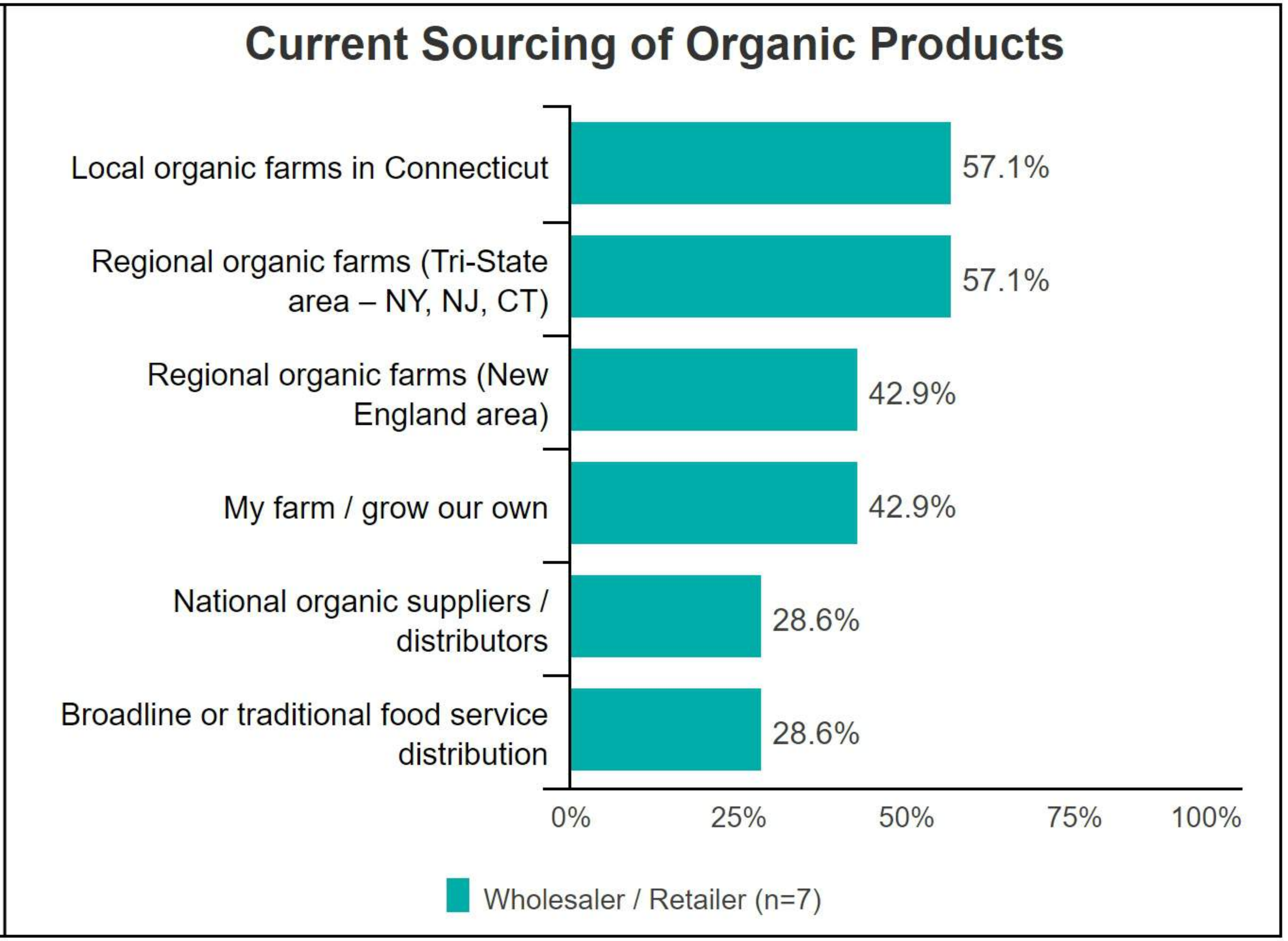
Base size	*17*
Consistently mention or highlight certification in communications	41.2%
All products are organic (implied, no extra promotion needed)	23.5%
Labeling / signage	17.6%
Use of USDA organic logo / branding	5.9%
Environmental benefits messaging	5.9%

Q: Do you actively promote any certified organic products or branding as part of your marketing strategies?
Q: Please explain how you incorporate the certified organic products into your promotion efforts?

Wholesale | Demand & Organic Product Sourcing

Nearly one-half of all retailers reported seeing a "moderate demand" for organic products among their customers, while nearly one-quarter reported a "low demand." Among retailers who sell organic products, over one-half reported sourcing from "local organic farms in Connecticut" and/or "regional organic farms (Tri-State area – NY, NJ, CT)."

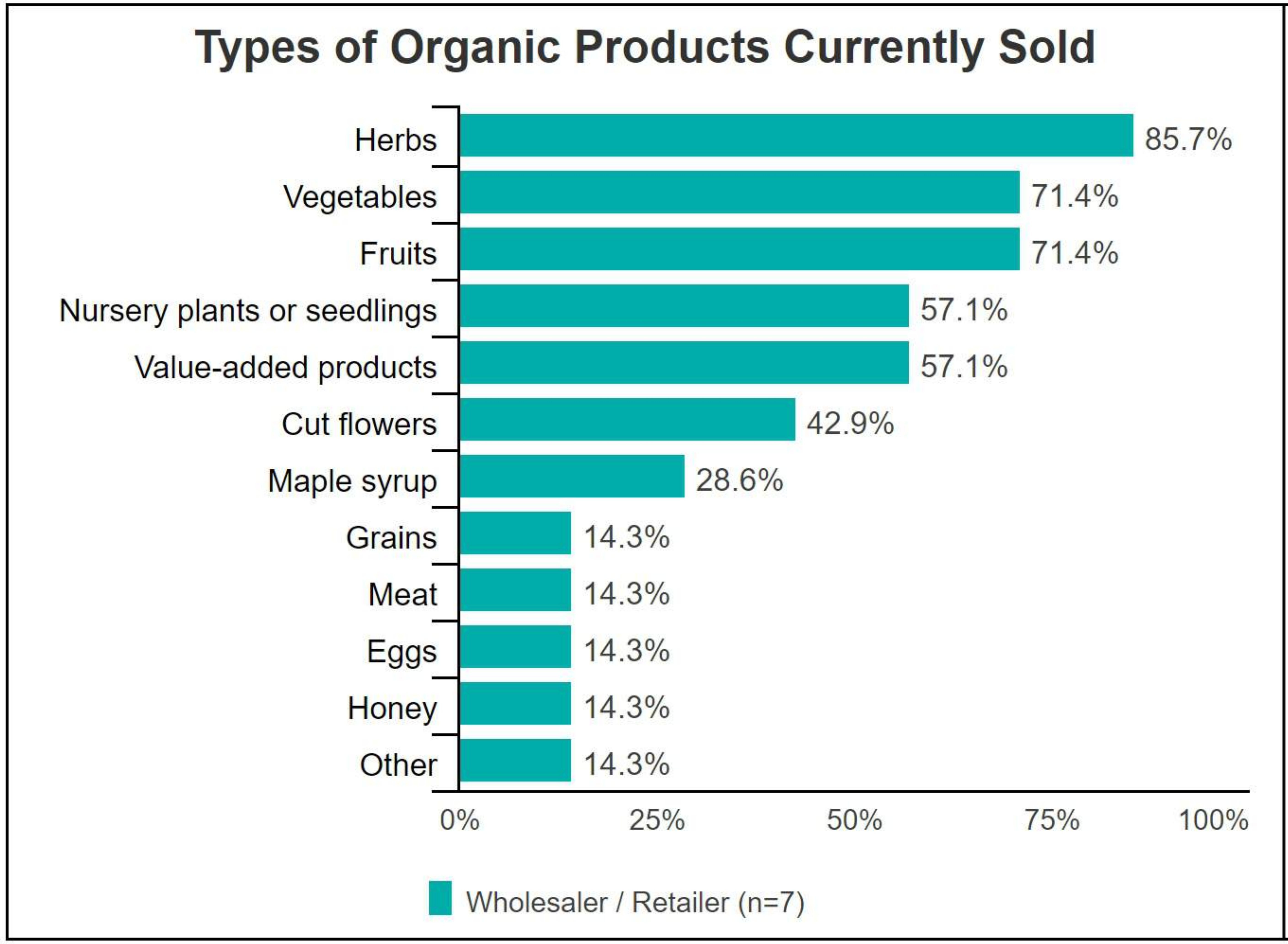


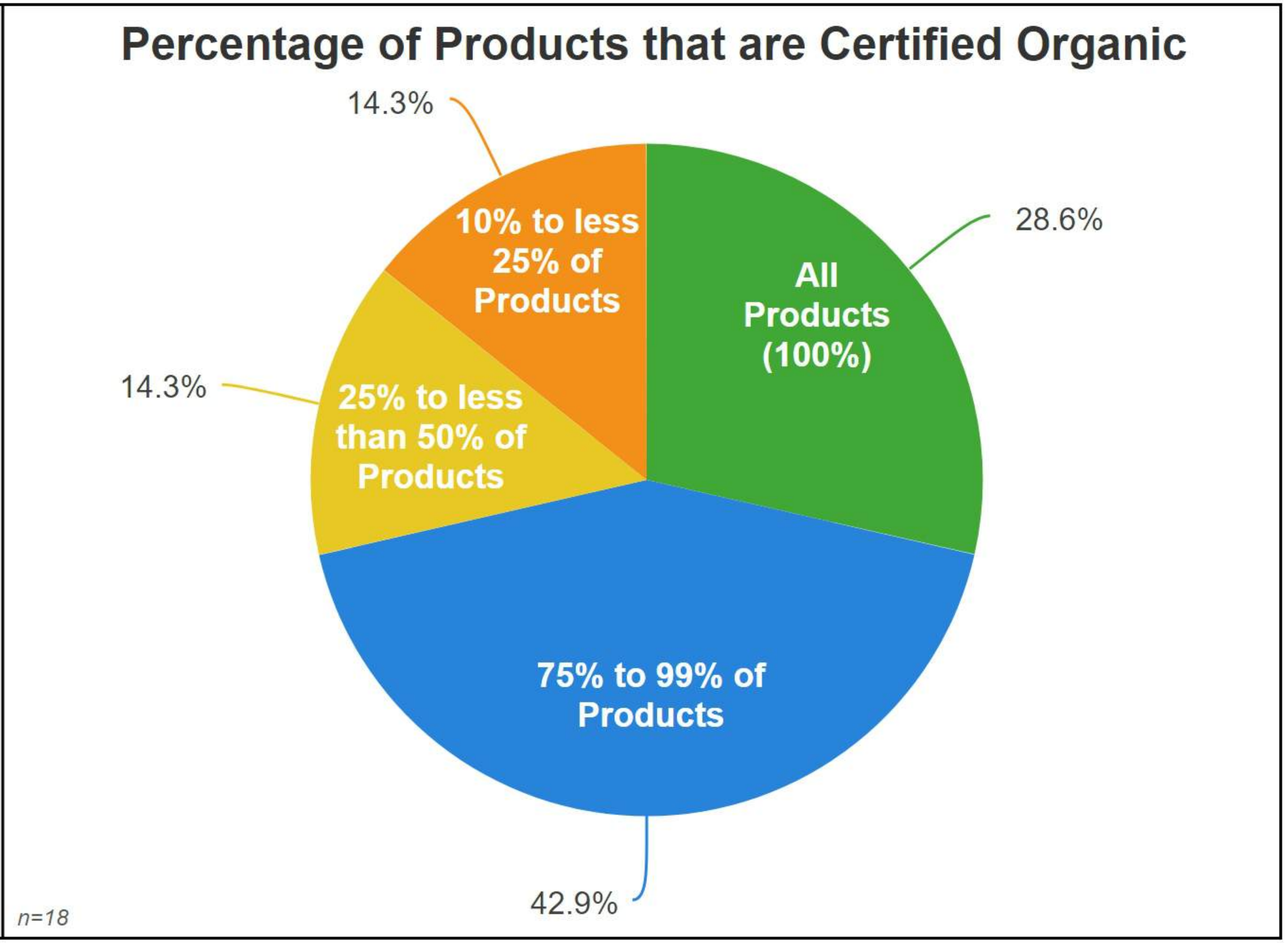


Q: How would you describe the demand for organic products among your customers?
Q: Where do you currently source your organic products? (Select all that apply)

Wholesale | Volume of Organic Products Sold

Of the retailers who sell organic products, over eight-out-of-ten reported currently selling organic "herbs," followed by nearly three-quarters who sell organic "vegetables" and/or "fruits." Over two-fifths of these retailers reported that "75% to 99%" of their products are certified organic, while over one-quarter reported that "100%" of their products are certified organic.





Q: Which types of organic products do you currently sell? (Select all that apply)
Q: What percentage of the products that you sell are certified organic?

Wholesale | Barriers to Selling Organic Products

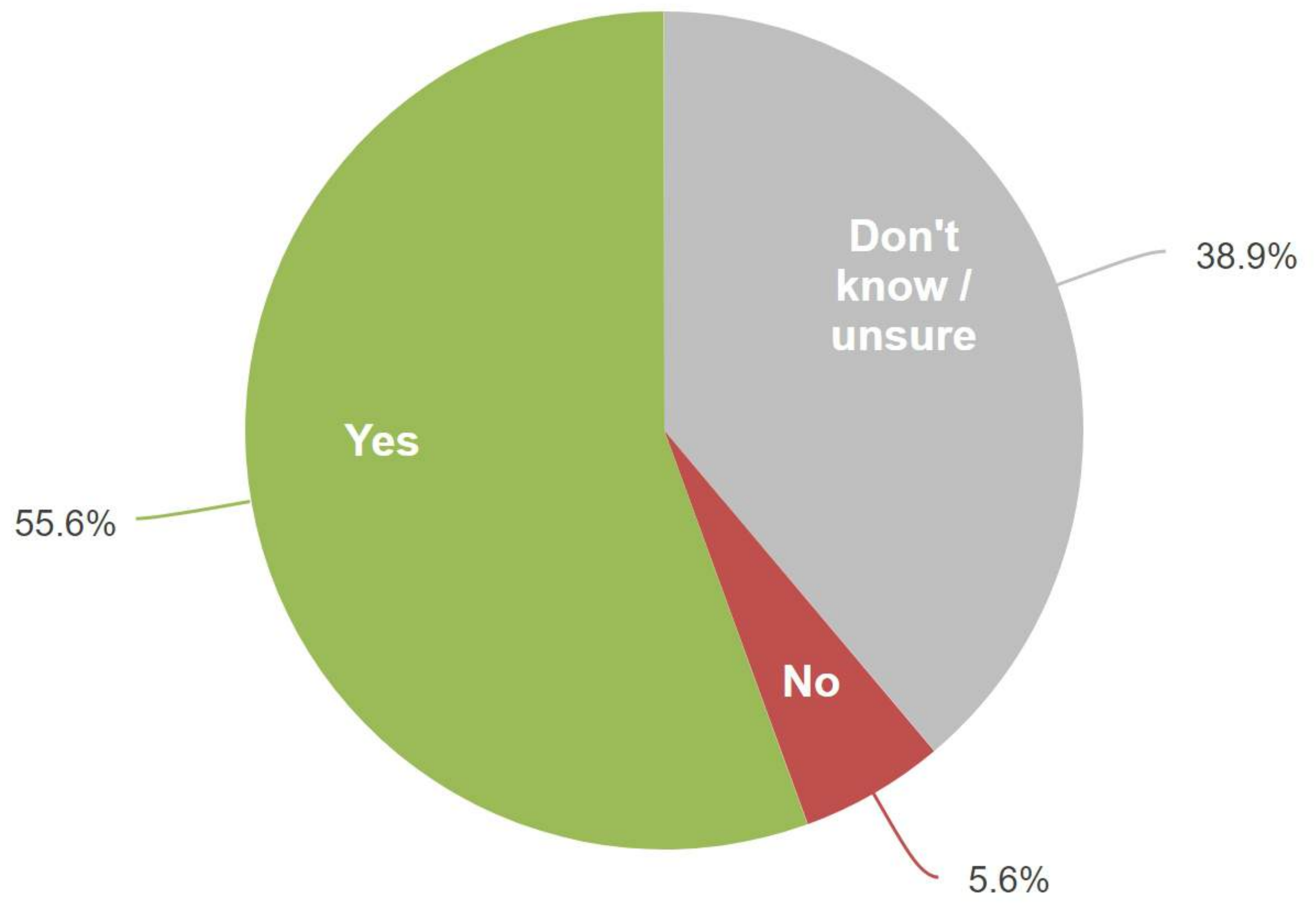
Nearly two-fifths of retailers reported that the main challenge they face in selling organic products is the "higher cost of organic products compared to conventional," followed by nearly one-third who cited "regulatory challenges related to organic labeling/sourcing" as a barrier. Of note, nearly one-third of retailers reported they "do not face any challenges selling organic products."

Q: What are the main challenges you face in selling organic products? (Select all that apply)

Wholesale | Interest in Expanding Organic Offerings

Over one-half of retailers expressed interest in selling more organic products, while nearly two-fifths were unsure. Among those interested in expanding their organic offerings, two-fifths cited the need for "financial incentives or subsidies for purchasing organic inventory" and "marketing and promotional support for organic products" to help facilitate that growth.

Interest in Selling More Organic Products



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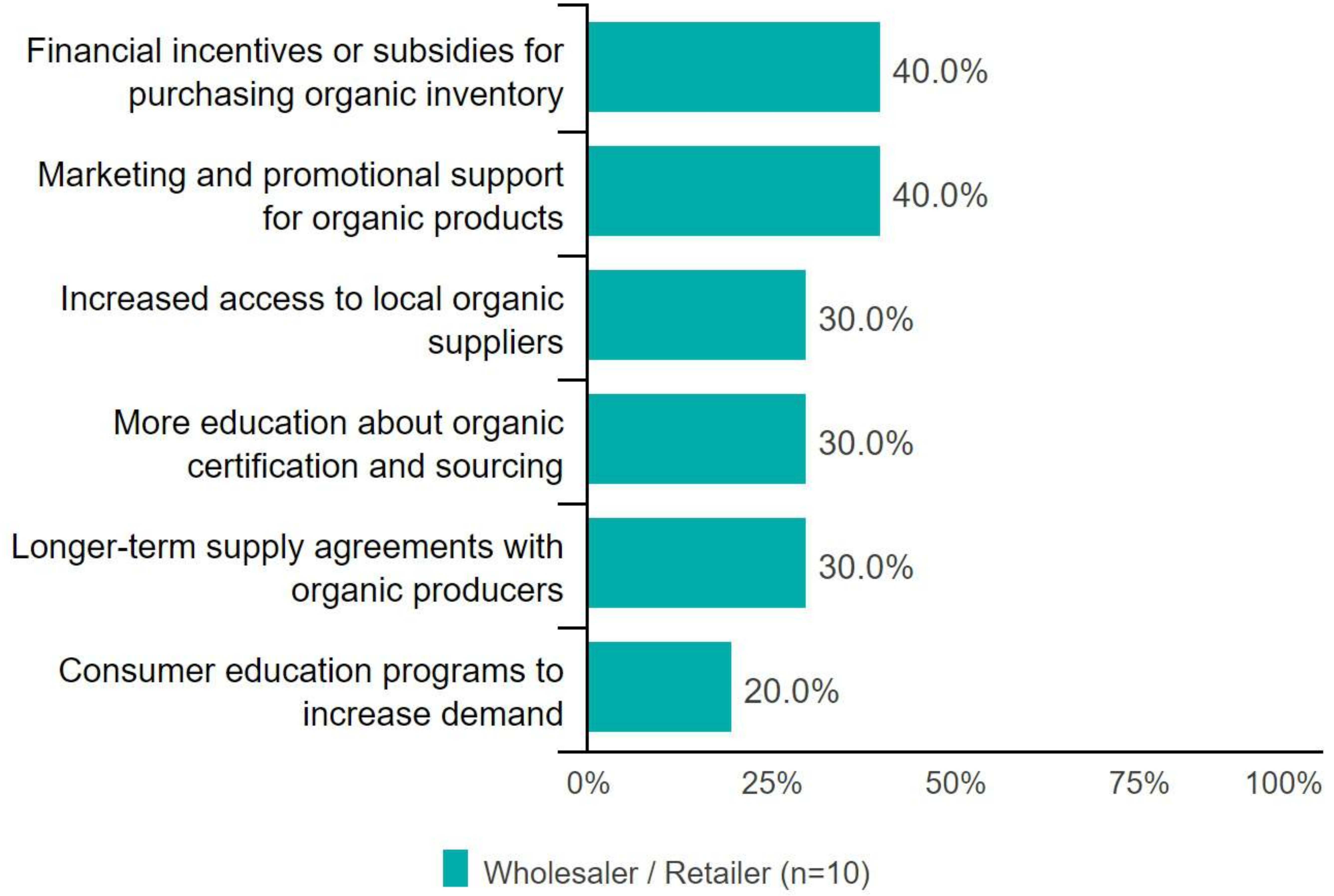
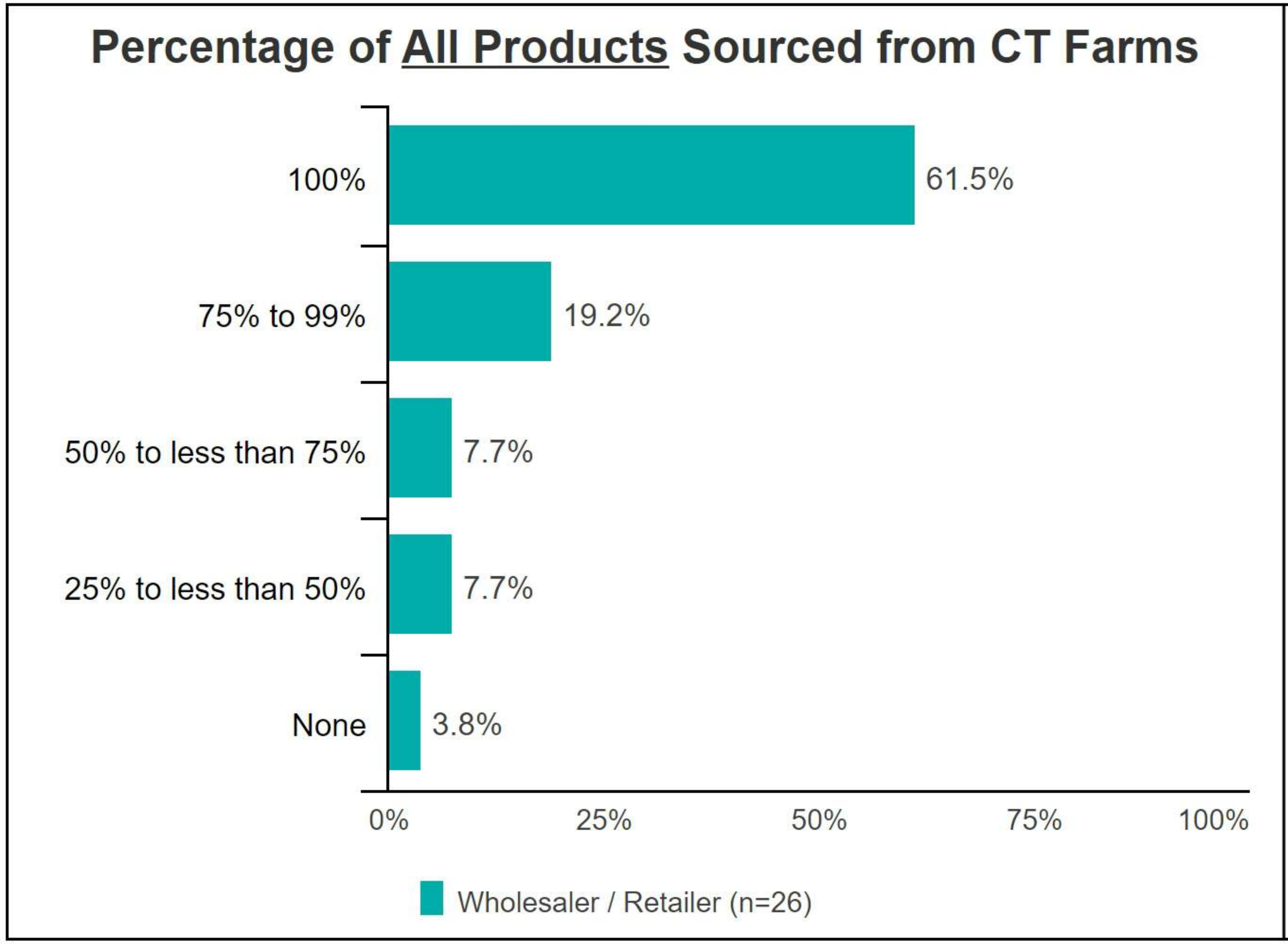
Support Needed to Expand Organic Product Offerings

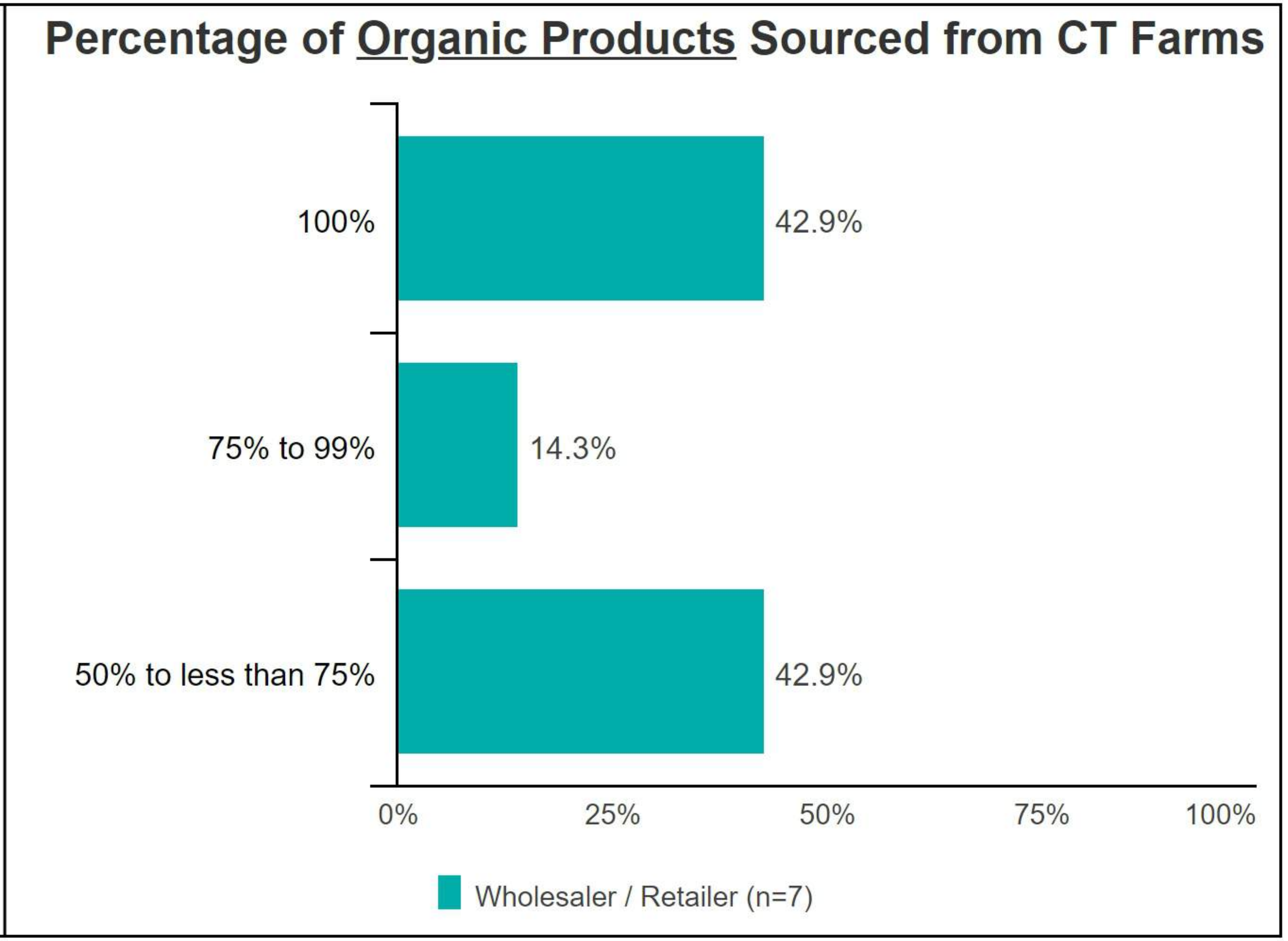


Q: Would you be interested in selling more organic products if these barriers were addressed?
Q: What types of support or resources would help you expand your organic product offerings? (Select all that apply)

Wholesale | Percentage of CT Farm-Sourced Products

Three-fifths of retailers reported that all of the products they sell are sourced from Connecticut farms, while others reported sourcing "75% to 99%" of their products from Connecticut farms. Among retailers who sell organic products, over two-fifths stated that all of their organic products are sourced from Connecticut farms, with an equal proportion reporting they source "50% to less than 75%."



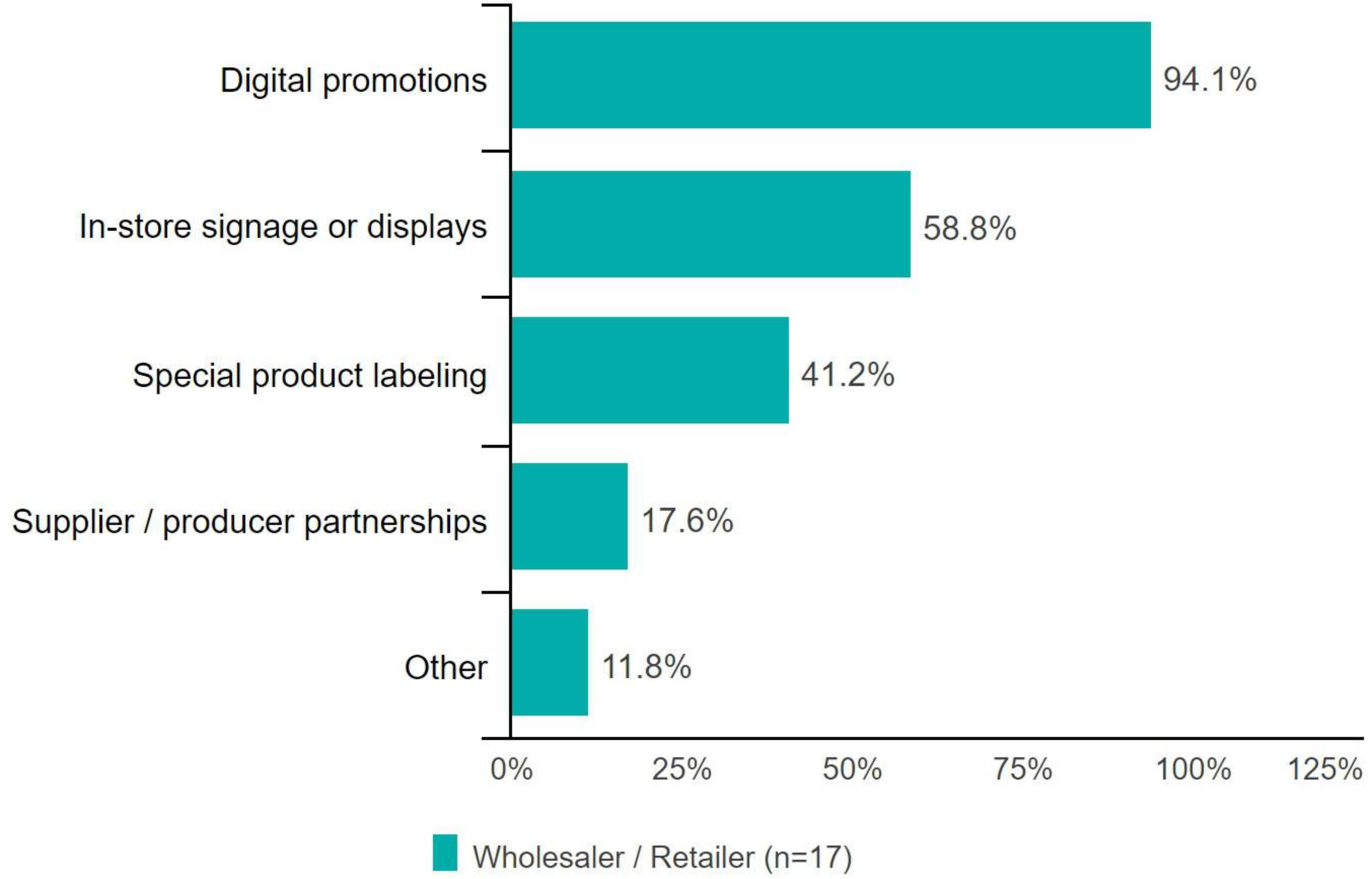


Q: What percentage of all products that you sell are sourced from Connecticut farms?
Q: What percentage of the organic products that you sell are sourced from Connecticut farms?

Wholesale | Organic Product Promotion

A majority of retailers who sell organic products communicate the availability of organic or local products to customers through "digital promotions," followed by over one-half who use "in-store signage or displays." Over one-third of retailers reported using key messaging such as "farm identity / transparency / shop local" to promote the availability of organic or local products.

Methods of Promoting Organic Products to Customers



Key Messaging Used to Promote Availability of Products

Base size	*17*
Farm identity / transparency / shop local	35.3%
Emphasis on organic certification / terminology	29.4%
Health / environmental messaging	17.6%
None / no comment	11.8%
Marketing channels	5.9%

Q: How do you communicate the availability of organic or local products to customers? (Select all that apply)
Q: What key messaging do you use to promote the availability of organic or local products to customers?

Considerations

Considerations

Increase Consumer Awareness and Access Through Targeted, Retail-Focused Outreach

While most consumers (78.7%) are familiar with organic products, just over half (52.7%) are aware of USDA-certified organic products that are grown in Connecticut. Lack of awareness about where to find CT Grown organic products (36.5%) and limited product visibility were primary barriers to purchasing. Consumers showed a clear preference for shopping at grocery store chains (59.5%) and farmers' markets (43.3%), and indicated they would respond best to messaging delivered via in-store signage (47.8%) and social media (32.2%).

Actionable Insights

- **Focus campaign visibility in major grocery store chains** with point-of-sale signage clearly identifying CT Grown USDA-certified organic products.
- **Create a digital awareness campaign** targeting platforms popular with younger consumers (e.g., social media, mobile ads) that includes where to buy, what's available, and why local matters.
- **Leverage educational elements in-store and online** that demystify certification, highlight benefits (health, sustainability), and address pricing perceptions.
- **Include coupon or promotion partnerships** with retailers and/or direct-to-consumer brands to encourage trial and repeat purchases.

Strengthen Market Connections and Messaging Support for Organic Producers

A significant share of CT organic producers are interested in expanding sales and adopting new marketing strategies but face key barriers such as lack of buyer connections (52.2%) and pricing challenges (54.3%). While most producers actively promote their certified organic products through digital means like social media (94.1%) and farm websites (88.2%), fewer feel adequately supported or represented by the CT Grown brand (36.4%). Campaigns that elevate the CT Grown organic identity and directly support producers in reaching new audiences could improve outcomes.

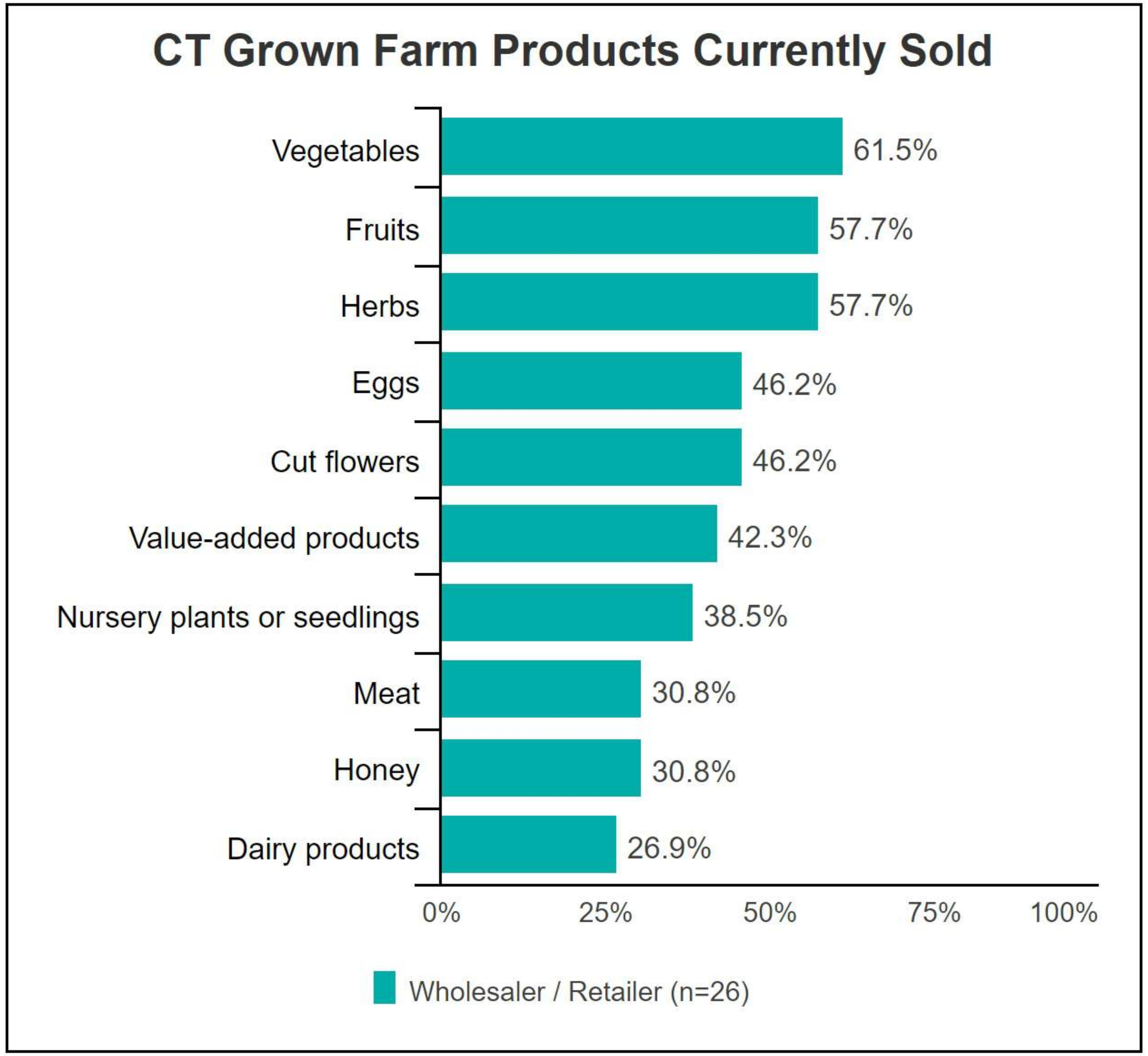
Actionable Insights

- **Develop co-branded marketing toolkits** for CT Grown organic producers to use in social media and farm promotions (e.g., templates, hashtags, CT Grown organic product labels).
- **Include B2B campaign elements** that connect producers with retailers or institutional buyers through CT Grown listings or networking opportunities.
- **Highlight success stories** or testimonials from local CT Organic farms to reinforce authenticity and expand consumer trust.
- **Address perceived gaps in brand support** by ensuring that CT Grown organic messaging is inclusive of farm identity, certification visibility, and transparency.

Appendix

Organic Production Volume

Appendix | Wholesaler Sale Volume



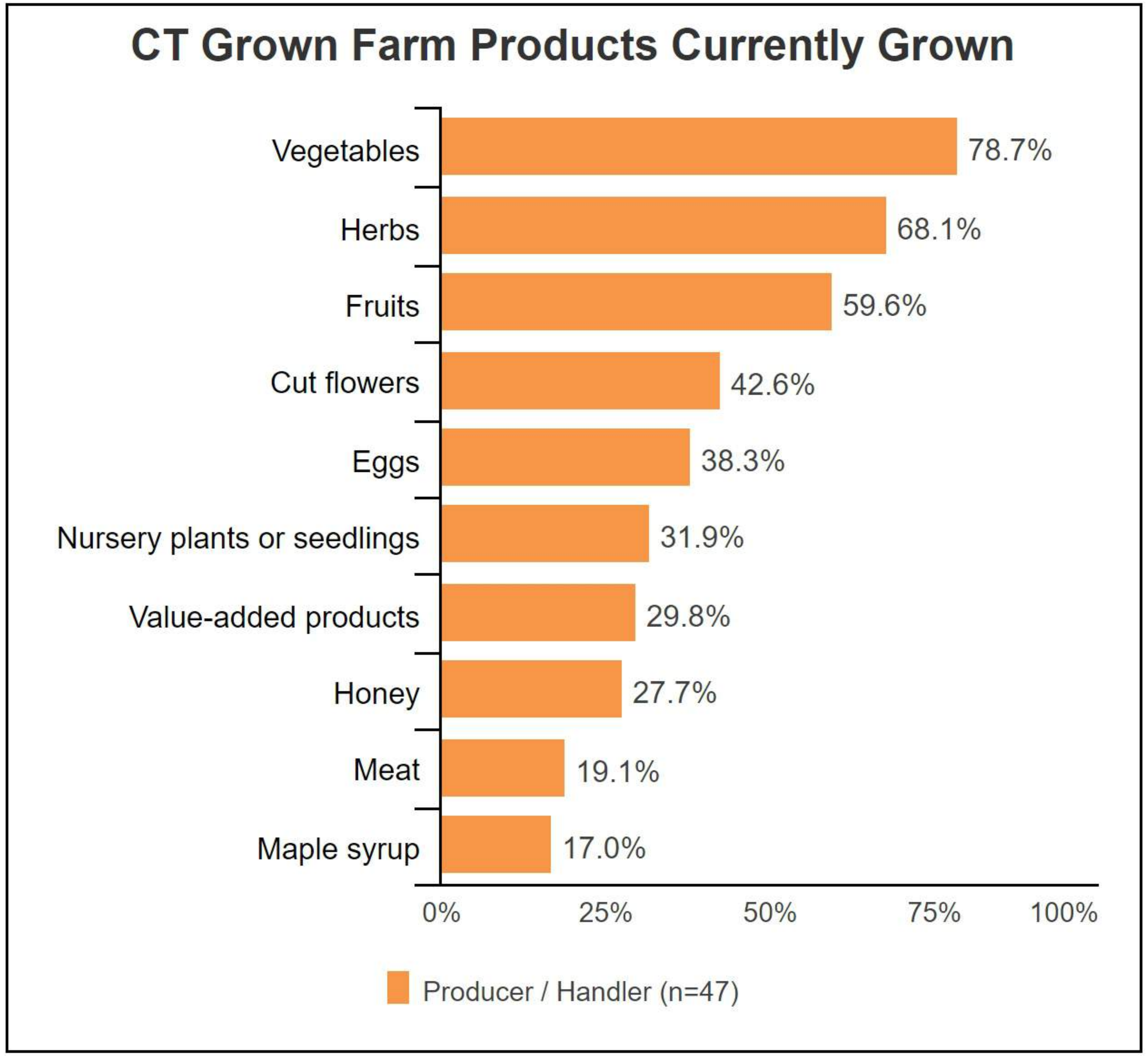
Volume of Product Sold over Past Year

	Less than 1 acre / 100 lbs / 10 units	1–4 acres / 100–499 lbs / 10–49 units	5–9 acres / 500–999 lbs / 50–99 units	10–24 acres / 1,000–2,499 lbs / 100–249 units	25+ acres / 2,500+ lbs / 250+ units
Herbs	81.8%	9.1%	9.1%	0.0%	0.0%
Honey	40.0%	0.0%	0.0%	0.0%	0.0%
Cut flowers	33.3%	55.6%	0.0%	0.0%	11.1%
Vegetables	23.1%	23.1%	7.7%	7.7%	30.8%
Fruits	23.1%	46.2%	7.7%	7.7%	7.7%
Nursery plants or seedlings	20.0%	60.0%	0.0%	0.0%	0.0%
Eggs	12.5%	0.0%	12.5%	12.5%	37.5%
Value-added products	12.5%	12.5%	0.0%	25.0%	12.5%
Grains	0.0%	100.0%	0.0%	0.0%	0.0%
Dairy products	0.0%	0.0%	0.0%	0.0%	20.0%
Meat	0.0%	16.7%	0.0%	0.0%	66.7%
Maple syrup	0.0%	0.0%	0.0%	0.0%	0.0%

n=26

Q: To begin, please indicate, which of the following CT Grown farm products do you grow, handle, and/or sell? (Select all that apply)
Q: Approximately, how much of each product have you sold or sourced over the past year? (Please answer in terms of volume or units sold.)

Appendix | Producer Growth Volume



Volume of Product Grown over Past Year

	Less than 1 acre / 100 lbs / 10 units	1–4 acres / 100–499 lbs / 10–49 units	5–9 acres / 500–999 lbs / 50–99 units	10–24 acres / 1,000–2,499 lbs / 100–249 units	25+ acres / 2,500+ lbs / 250+ units
Herbs	84.4%	9.4%	6.3%	0.0%	0.0%
Cut flowers	65.0%	30.0%	0.0%	0.0%	5.0%
Honey	53.8%	7.7%	0.0%	0.0%	7.7%
Nursery plants or seedlings	53.3%	33.3%	0.0%	0.0%	0.0%
Fruits	42.9%	35.7%	7.1%	3.6%	7.1%
Maple syrup	37.5%	0.0%	12.5%	0.0%	12.5%
Value-added products	35.7%	14.3%	0.0%	14.3%	14.3%
Vegetables	32.4%	29.7%	10.8%	10.8%	13.5%
Eggs	27.8%	11.1%	5.6%	5.6%	33.3%
Grains	0.0%	100.0%	0.0%	0.0%	0.0%
Dairy products	0.0%	0.0%	0.0%	0.0%	16.7%
Meat	0.0%	11.1%	0.0%	0.0%	66.7%

n=47

Q: To begin, please indicate, which of the following CT Grown farm products do you grow, handle, and/or sell? (Select all that apply)
Q: Approximately, how much of each product have you produced over the past year? (Please answer in terms of acreage or harvested amounts.)

About GreatBlue

Harnessing the Power of Data

...to help clients achieve organizational goals.

Data supporting strategic decisions to improve products and services. Since 1979, our experience with study and instrument design, data collection, analysis, and formal presentation assists our clients in identifying the "why" and "what's next."

Talent with a knowledge base in a wide range of industries and methodologies ensures a 360º view of the challenges faced and the expertise to address them.

Solutions that are customized to provide a personalized approach to understanding organizational, employee, and customer needs, allowing for more informed decisions.

Methodologies:

- Digital Surveys
- Focus Groups
- In-Depth Interviews

Studies:

- Awareness and Perception Studies
- Customer and Employee Satisfaction Studies
- Journey Mapping
- Creative and New Concept Testing

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WHAT'S NEXT.

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