ORGANIC AND REGENERATIVE FARMING BOARD

FARM OWNER SURVEY REPORT

2025

About the survey and report

- This is a report of the needs assessment survey conducted by the Organic and Regenerative Farming Board of New Jersey (ORFBNJ) in January and February 2025.

- The purpose of the survey was describe organic and regenerative farming in NJ and what the farmers most need to be successful.

- The survey included responses from over 200 individuals. This report is of a selection of data from Farm Business Owners only. We collected data from farm employees and from agricultural service providers, and that is not shown here.

- To our knowledge, this is the most complete survey of organic and regenerative farmers and their needs that has been conducted in any state in the Northeast.

The data collected paints a picture of the organic and regenerative farming in NJ through

- Demographics
- Profitability
- Support, Services, & Assistance
- Climate & Soil

What we learned

- New Jersey’s organic and regenerative farmers are overall young, diverse, and new to farming.
- They grow most things you can think of, but concentrate heavily on fast growing specialty crops.
- They have needs that are not being met by existing support services within the state

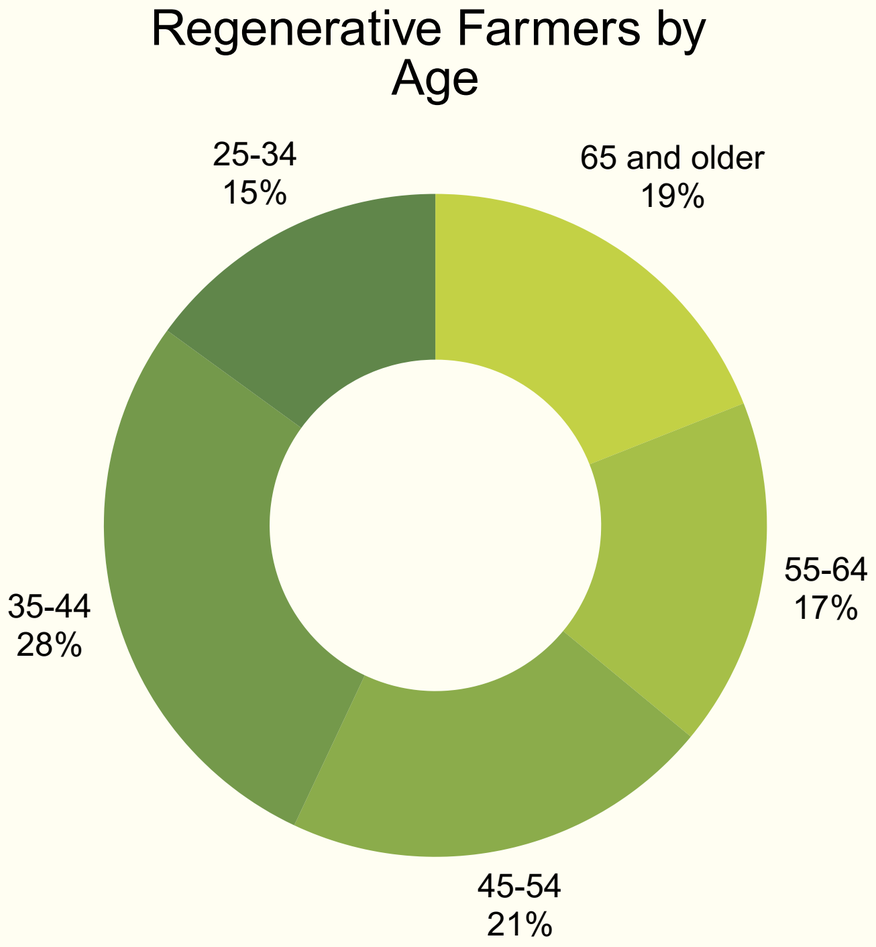
What we can do with this information

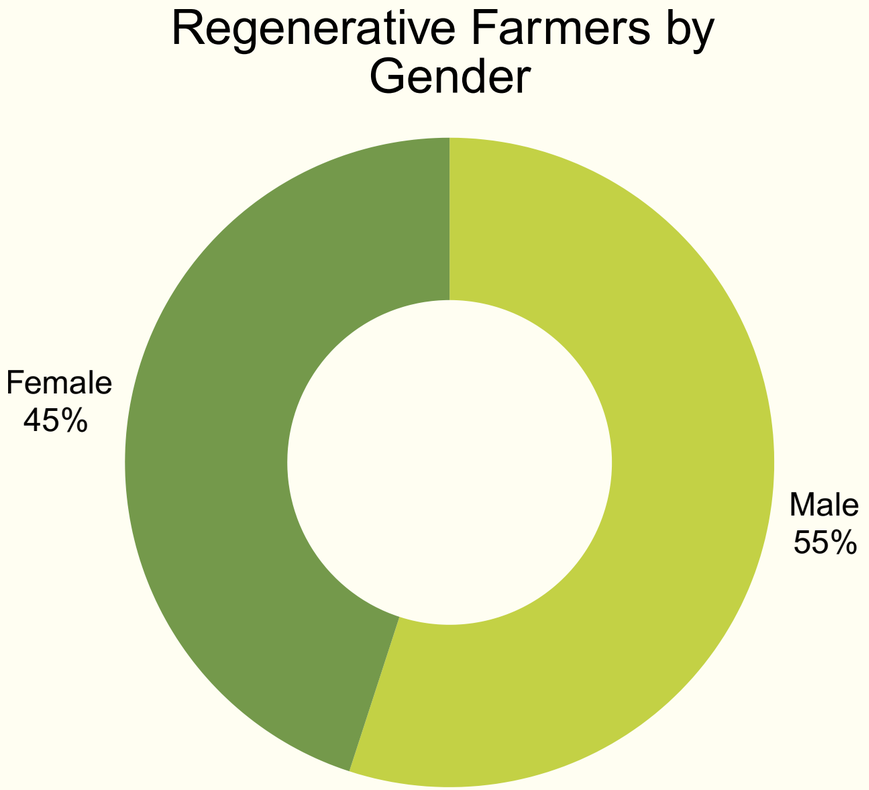
Using the insights from this report, NJ legislators, the Department of Agriculture, Rutgers Cooperative Extension, and the wealth of nonprofit service providers in our state can better serve our community!

Key Findings

- The cost of farmland is the largest barrier for farmers
- Many of these farmers concentrate on enterprises that have a low cost of entry
- Direct sales to individual customers is overwhelmingly how these farmers sell their products
- Extreme weather is a major concern
- The best chance of profitability is linked to being a business sized to employ and manage 11-20 people, indicating the need for management skills
- Lower profitability farms report less engagement with support services, suggesting the better support outreach can have important impacts

Who Are New Jersey's Regenerative Farmers?

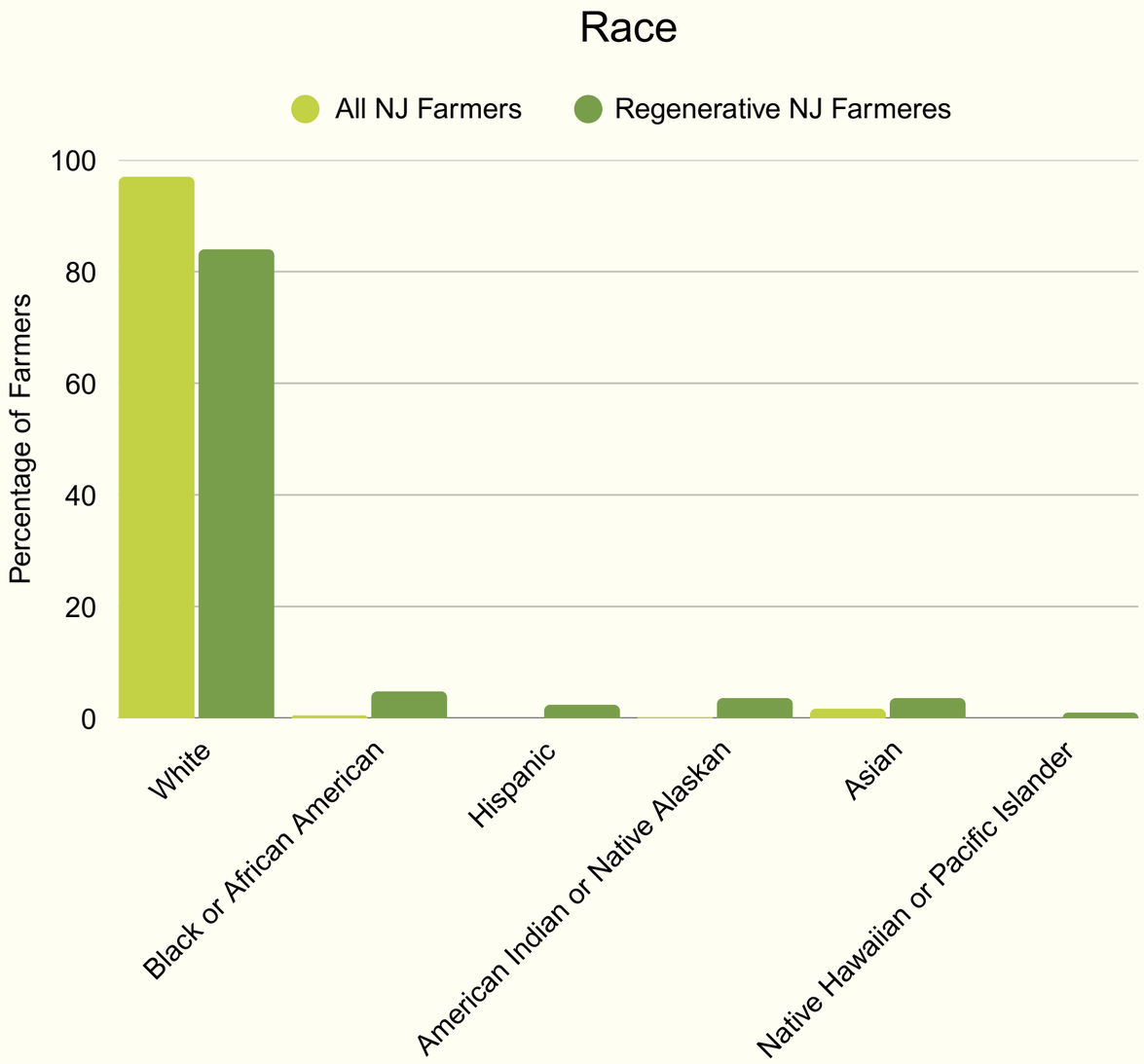


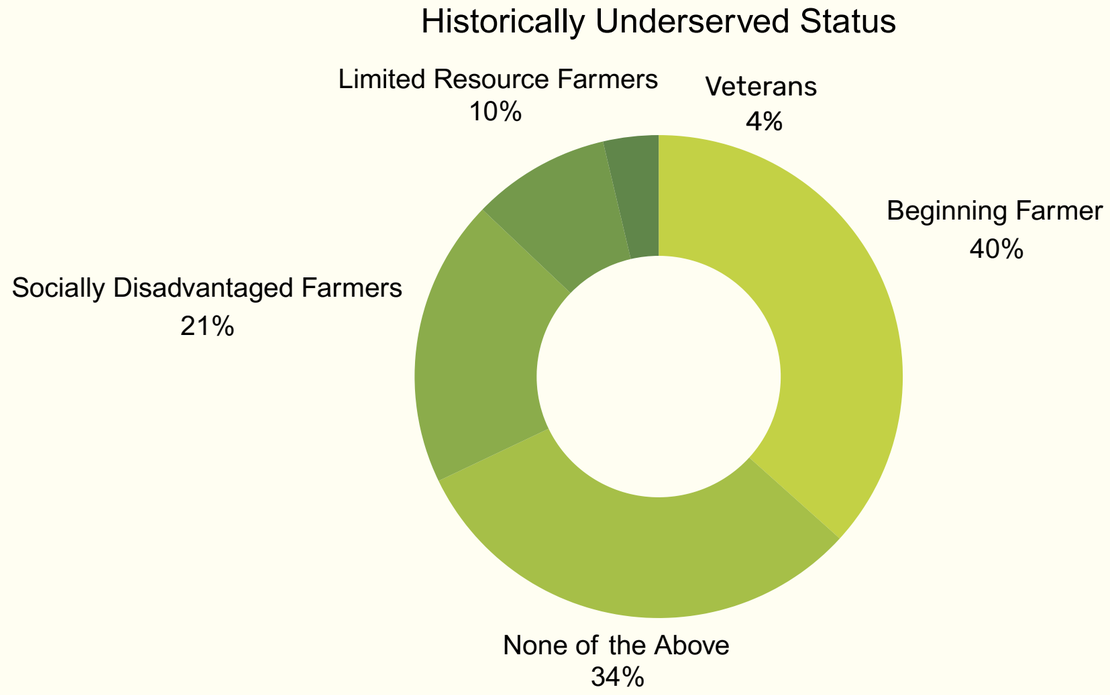


49% percent of respondents were between the ages of 35-54

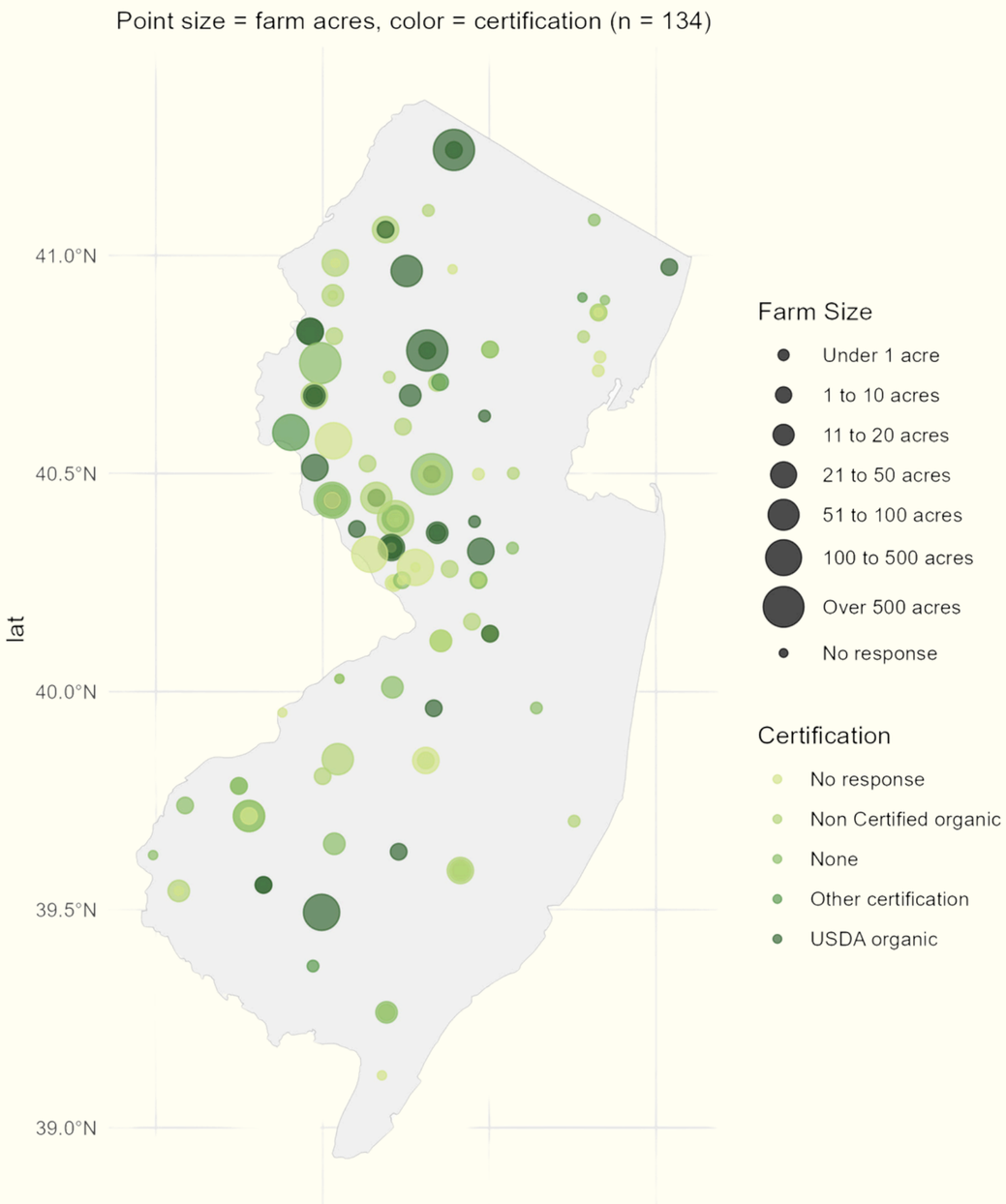
45% of these farm owners identify as female, compared with 38% at the state

Race & Historically Underserved Status





Where are New Jersey's Regenerative Farms?



Additional maps generated with the survey data

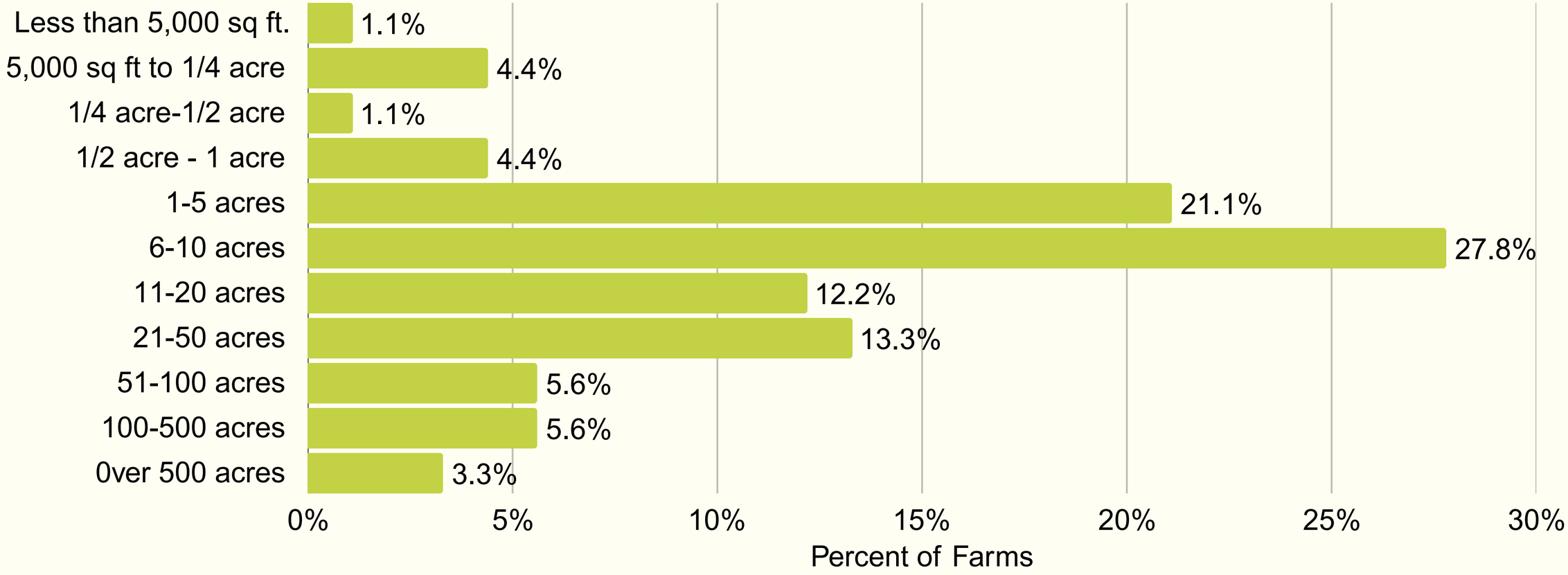
Interactive NJ Map displaying

- %of beginning farmer
- %of owned land
- farms by gender and revenue

Interactive NJ Map displaying

- profitability
- annual revenue brackets
- farm demographics

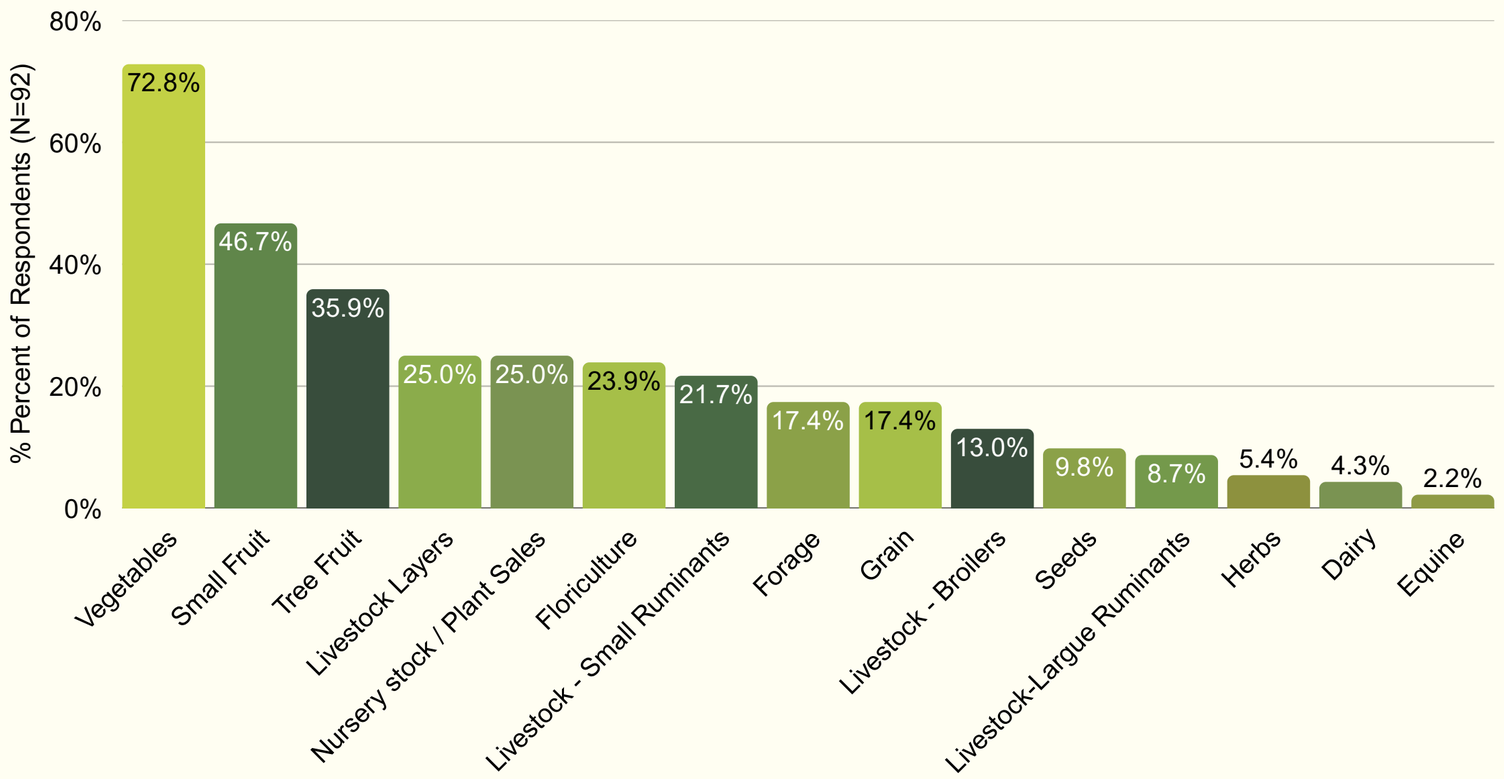
Organic Regenerative Farm Size Distribution by Acreage



While the share of organic and farms under 10 acres is substantially higher in our sample than in the statewide farm distribution 59.9% versus 28.5% …

it is worth noting that over ¼ of all NJ farms report that they are 10 acres or less!

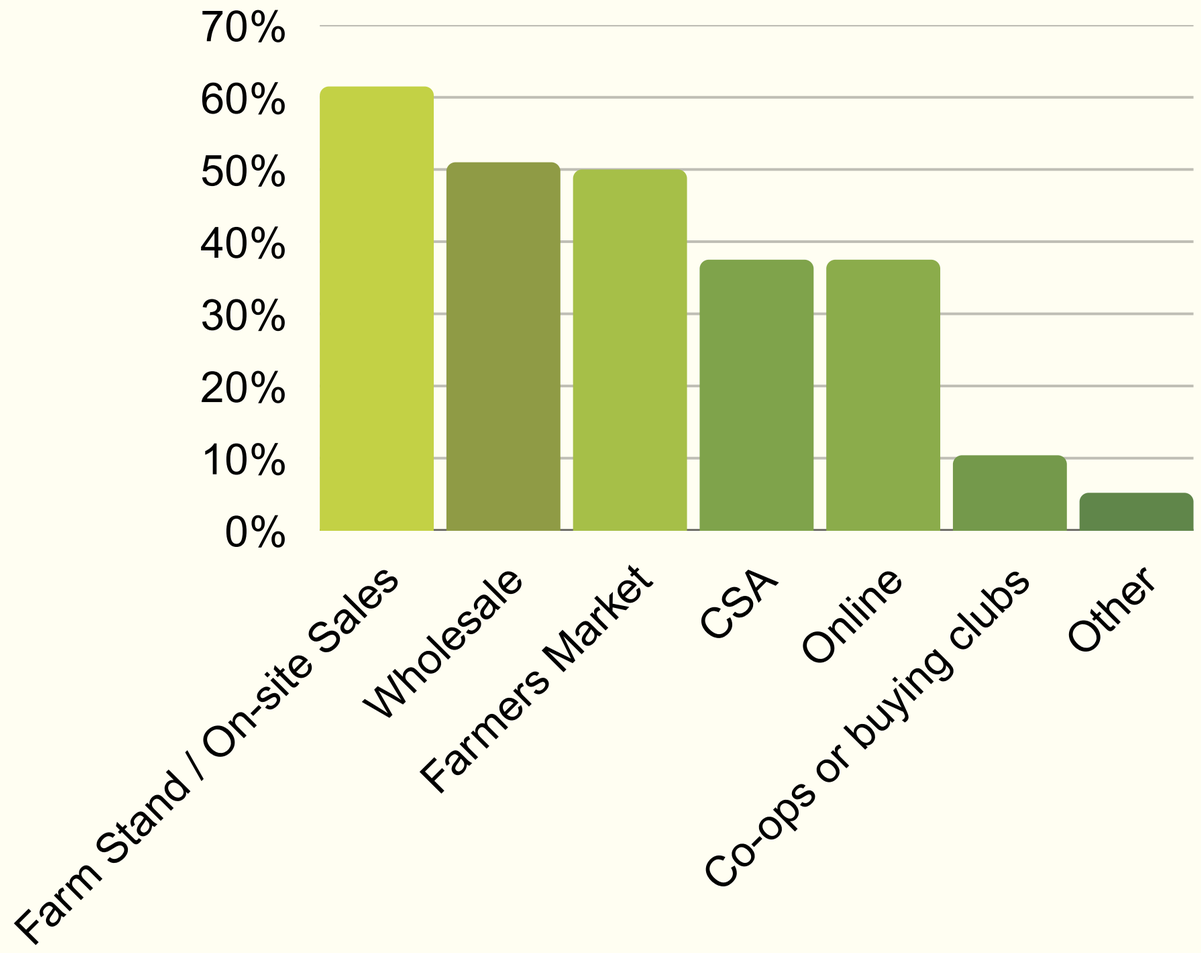
Products Sold by Regenerative Farmers



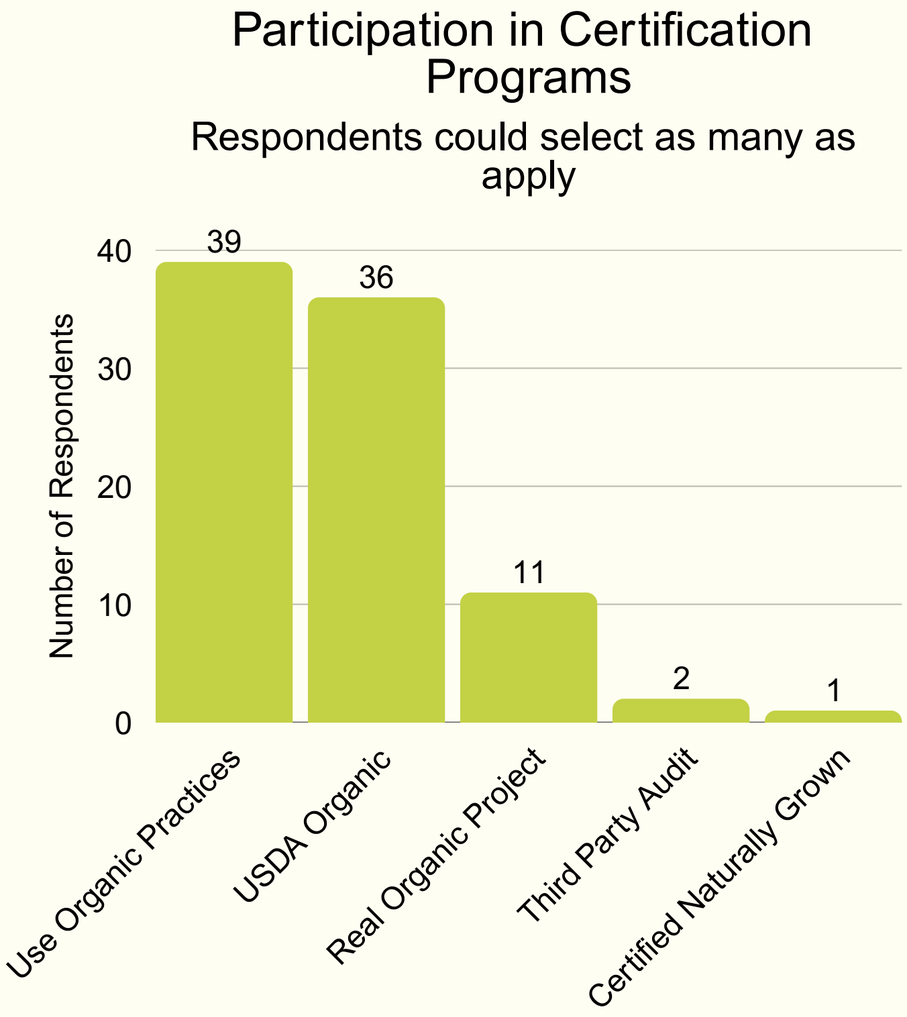
- We infer a positive correlation between the most common products sold and a lower cost of entry for start up of those enterprises.
- From our Board's internal experience, vegetable growing and small fruits are among the types of specialty crop agriculture a farmer could start a business in.
- It seems likely that a lack of financial resources combined with the beginner status of many of our farmers is responsible for this product distribution.
- We see opportunity for enterprise diversification if capital investment and training became available.

Sales Channels

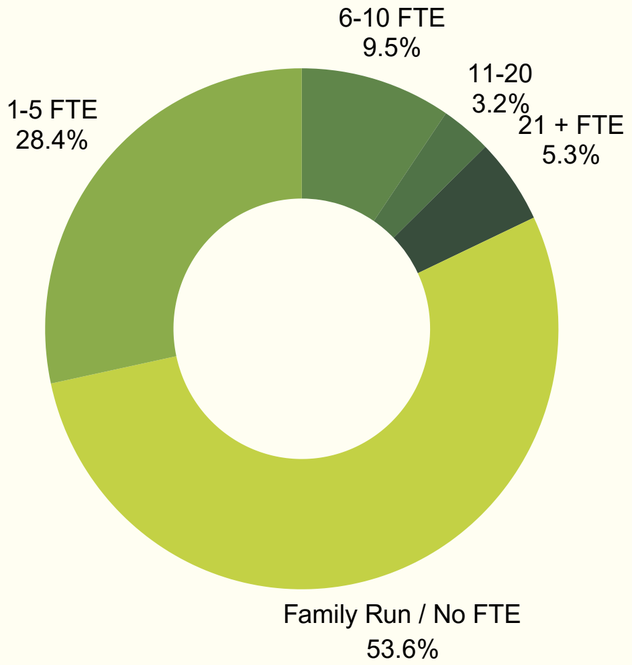
Our farmers overwhelmingly market by selling directly to the end user. This information should be used to inform marketing programing and training for this demographic.



Certification Programs



Full-time Equivalent (FTE) Employees

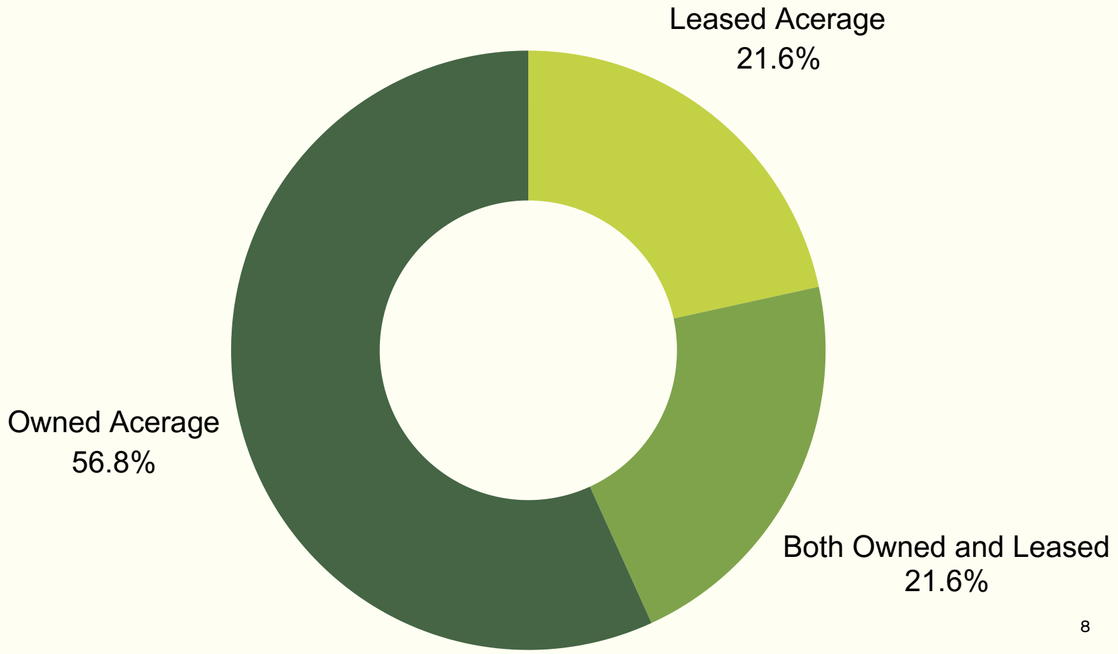


- 53.7% of respondents reported no full-time employees, indicating that their farms are entirely family-run compared with 35% in NJ overall
- 28.4% operate with a small workforce of 1 to 5 FTEs, while
- Only 18% of farms reported having more than five employees

Land Tenure

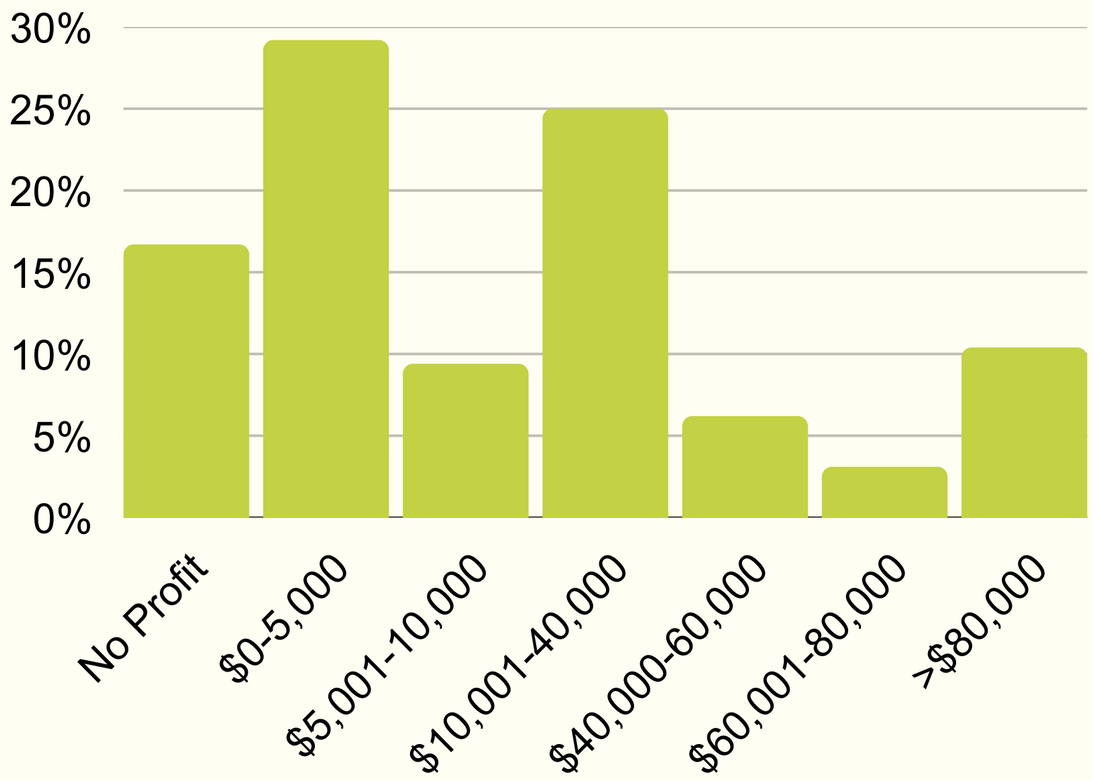
- Surveyed farmers are more likely to operate on leased or mixed tenure farms than the total pool of producers in NJ.

- Just under 57% of respondents reported owning the land they farm, this differs from the broader Census profile, where 68% of farmland acres in New Jersey are owned.



Profitability

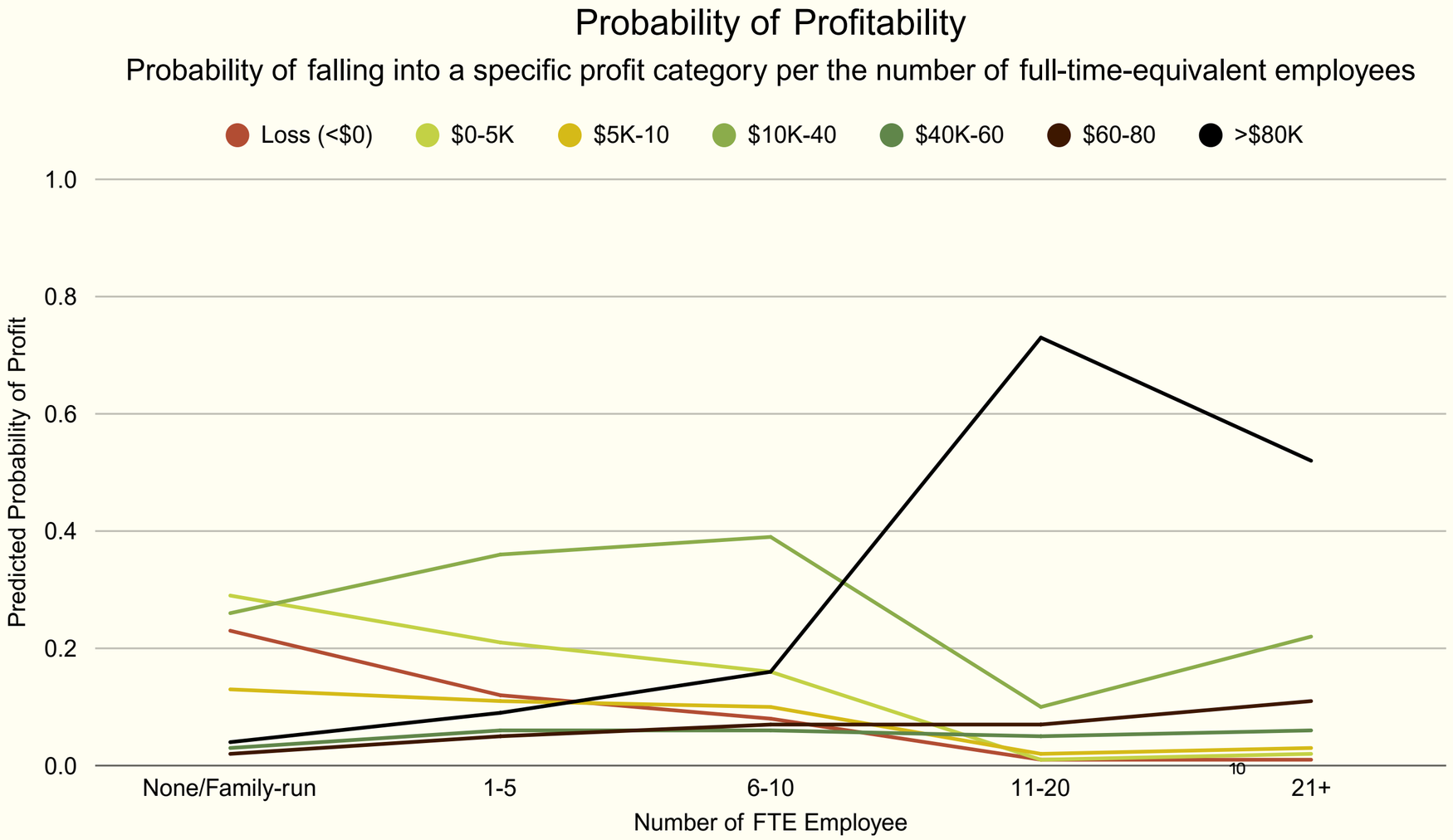
Average profit over the previous three years. The farms in this survey fared no worse regarding profitability compared to all New Jersey farms.



- 17% reported no profit
- 30% reportedannual profits of $0–$5,000
- 34% of farms reported earnings between $5,001 and $40,000
- 19% indicated profits above $40,000
- 10.6% reporting earnings greater than $80,000

Probability of making a higher profit is highest when surveyed farms have 11-20 full time employees

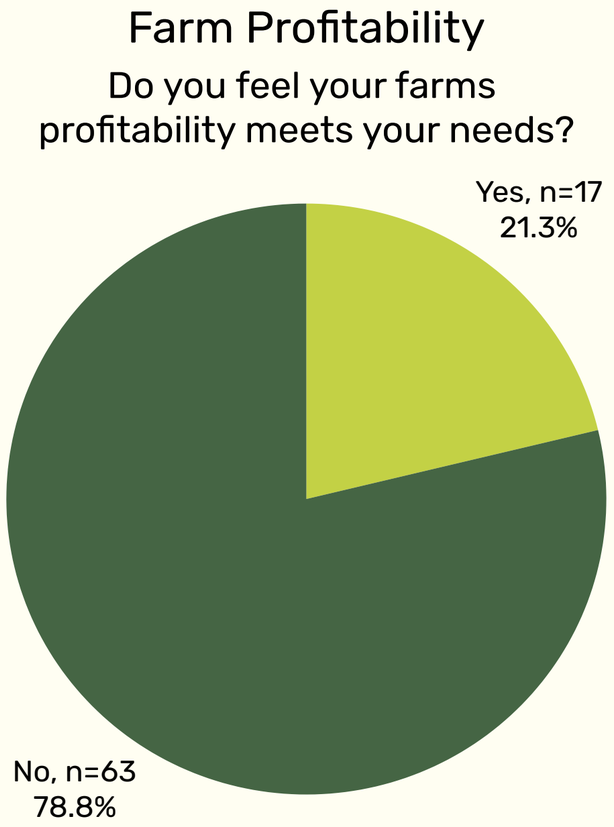
As Full-Time Equivalent (FTE) staffing increases from 0 to 10 employees, there is a modest shift in predicted probabilities toward the mid-range reported profit categories ($10–40K), but the most pronounced jump in profitability occurs at the 11–20 FTE threshold. These results suggest that employment scale plays a pivotal role in farm profitability, potentially due to increased production capacity, specialization, or market reach that comes with additional labor. However, farms with 21 or more employees show slightly lower predicted probabilities of high profit compared to the 11–20 FTE group, indicating diminishing or more variable returns at even larger scales. The skills required for farm owners to successfully recruit, manage, and maintain employees are thus critical, but we see a gap in programming available to develop these skills. We show later in this report that labor availability and quality are key concerns our farmers.

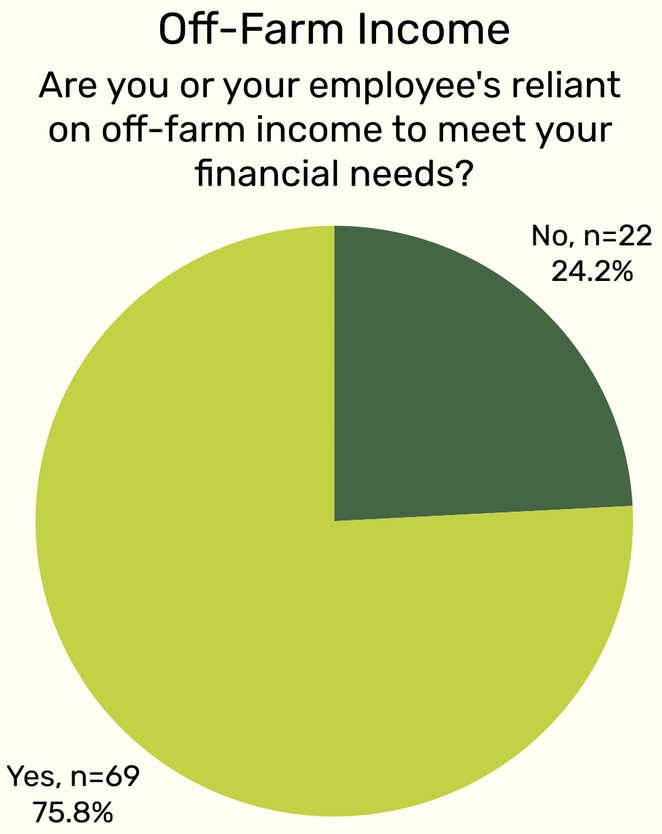


Profitability

- **21% report that their farm's profitability is sufficient to meet basic financial needs**

- **At the same time, a large majority 75% report relying on off-farm income to meet financial needs.**

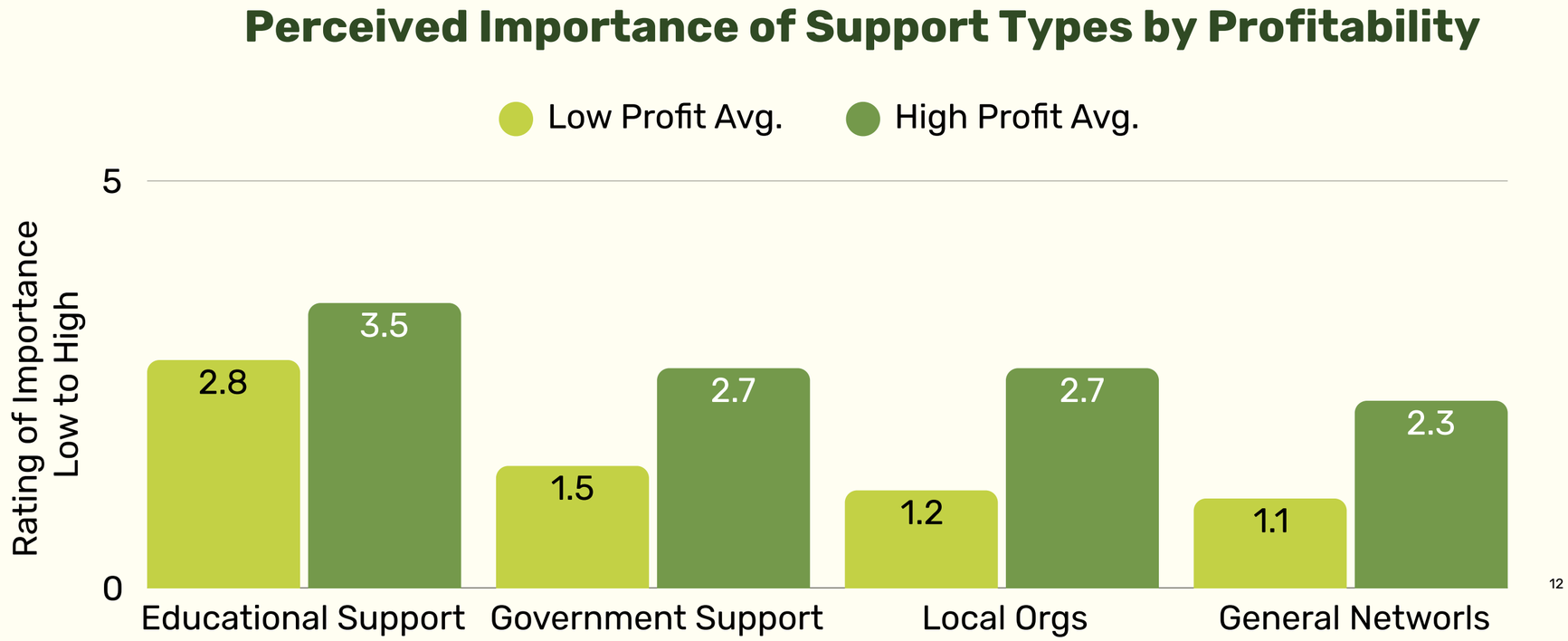




Support, Services, & Assistance

- High-profit farms consistently rated sources of support including educational programs, government resources, local organizations, and general networks, as significantly more important than their lower-profit counterparts

- These differences were sizable in magnitude. High-profit farms appear to benefit from broader and more intensive engagement with the full spectrum of public and private support programs.



Support, Services, & Assistance

Perceived Importance of Support Types by Farm Size

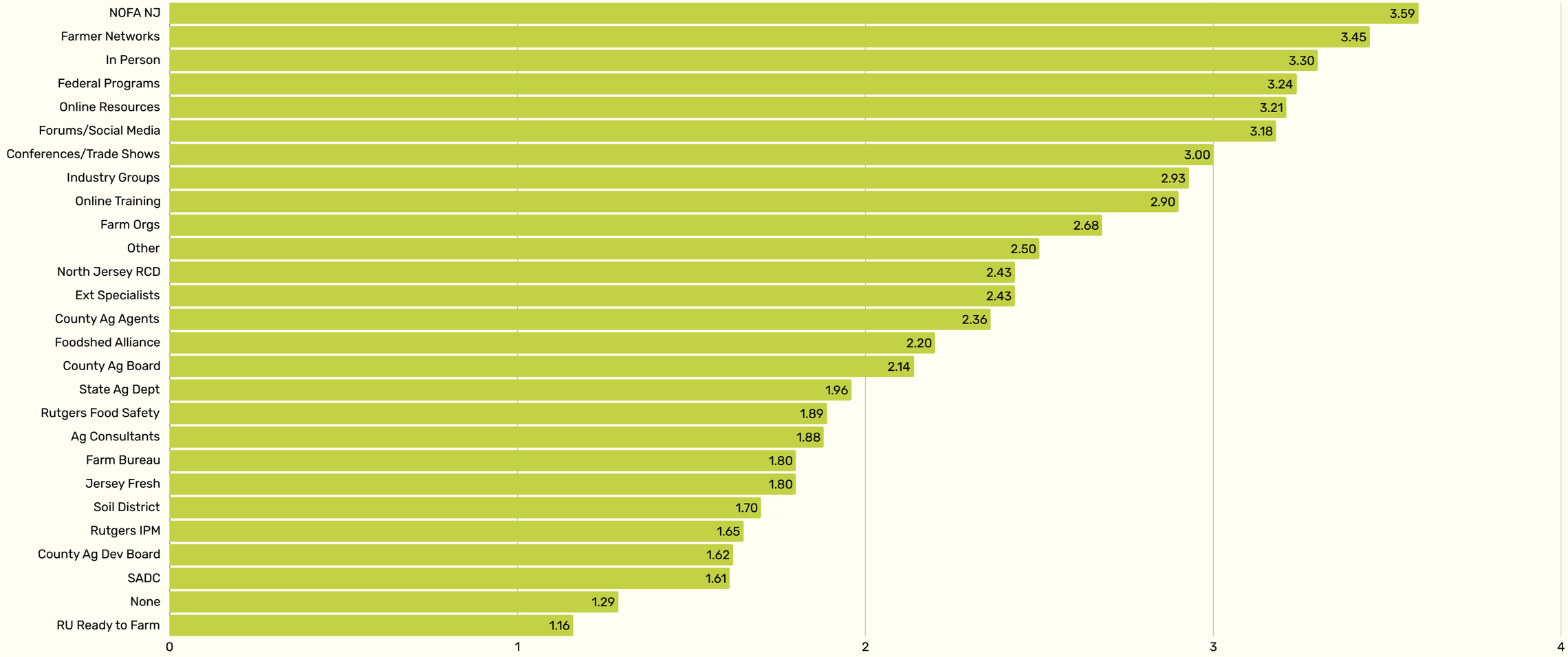
- Within these four categories, smaller farms consistently gave higher scores to the importance of the below assistance programs.

- There is strong demand from respondents in the <5 acre group for programs that address their specific needs.

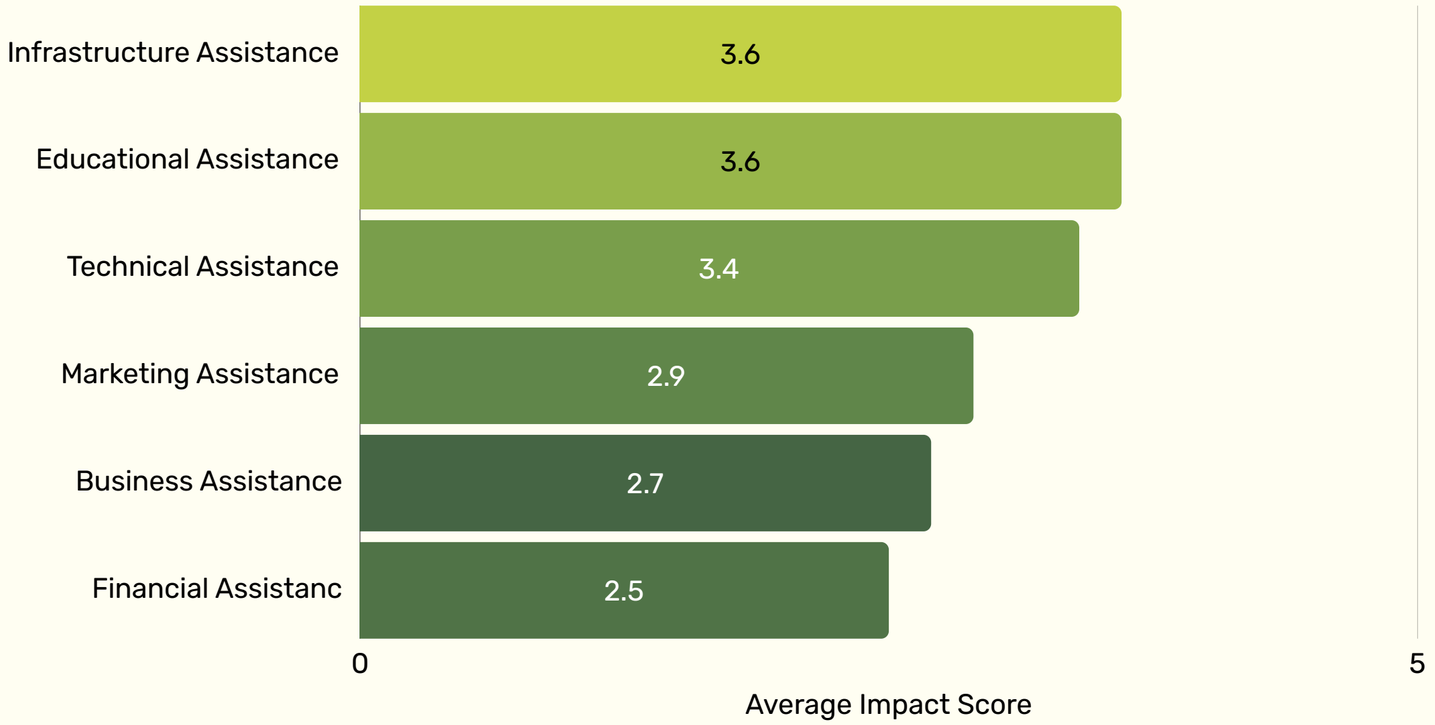
Services Having a Positive Impact on Business

- Survey takers were asked to rank the level of positive impact the following services have had on their farms' success. These ratings offers providers that have lower average scores the opportunity to respond to the needs of this community.

- For this report, all respondents were farm owners, and some services do not target that sector. Another possible factor to consider for some scores is that some service do not direct outreach to the organic/regenerative farming subset.



Importance of assistance programs by average sector score



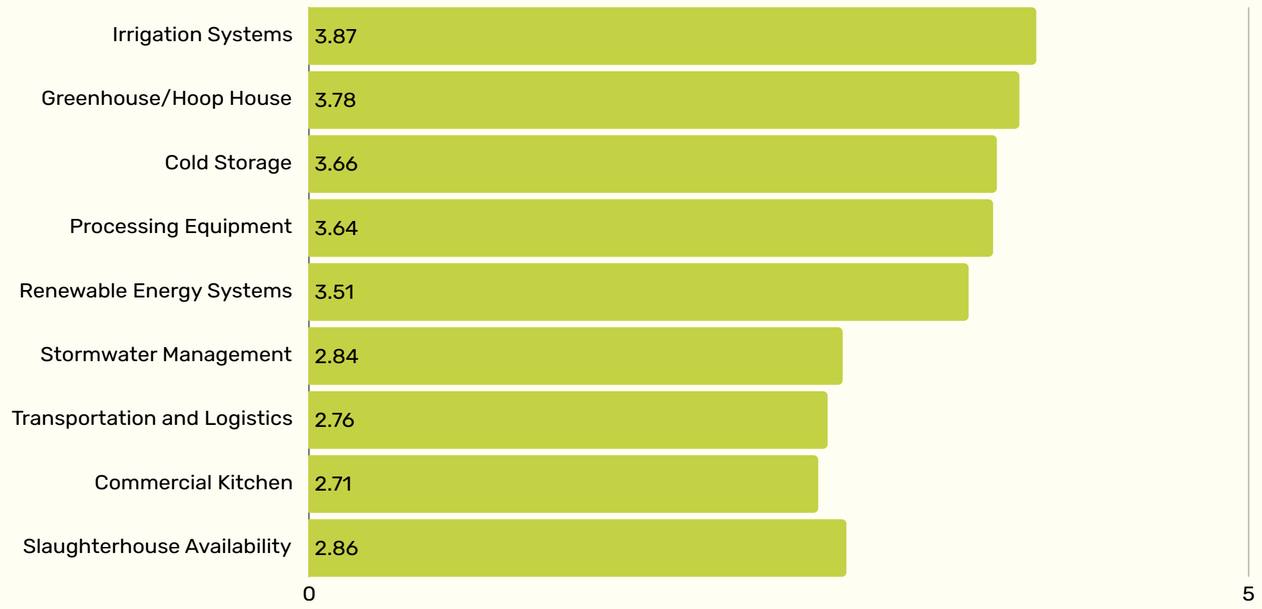
Infrastructure and education emerged as the most urgently needed categories of support, with farmers rating those the highest in mean importance

- Across all six of these assistance program domains—financial, business, marketing, technical, educational, and infrastructure assistance—high-profit farms consistently rate these supports as more important to their profitability and sustainability than low-profit farms.
- This suggests a structural dynamic where high-profit farms are either better positioned to access resources, to know of their existence, or are more adept at converting them into economic gain.
- These findings raise critical equity concerns, particularly if low-profit farms are underutilizing or are underserved by programs that demonstrably correlate with higher success.
- Targeted outreach, capacity building, or redesign of support mechanisms may be needed to bridge this utilization gap.

Importance of assistance programs rated individually

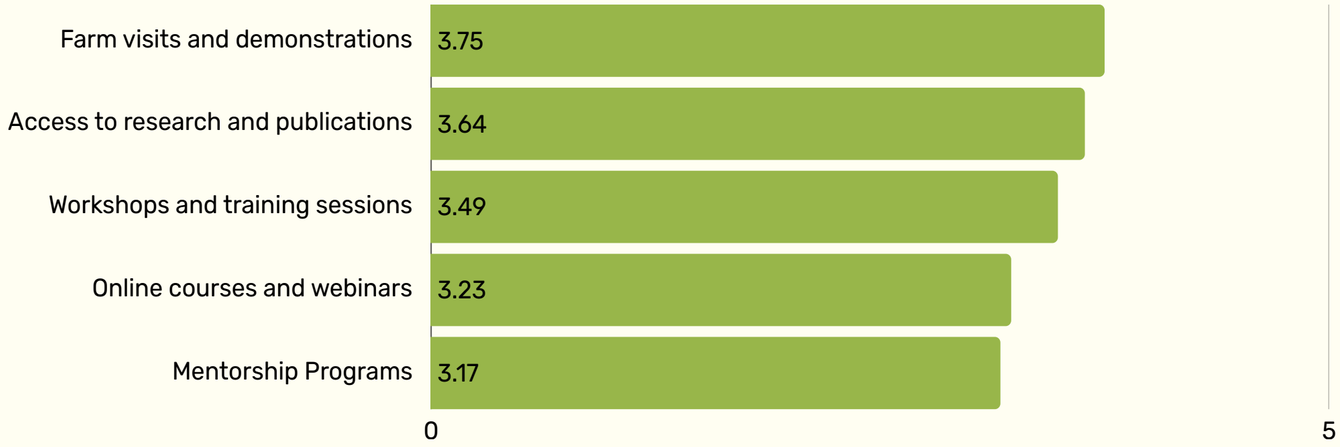
Infrastructure

Importance of infrastructure assistance programs



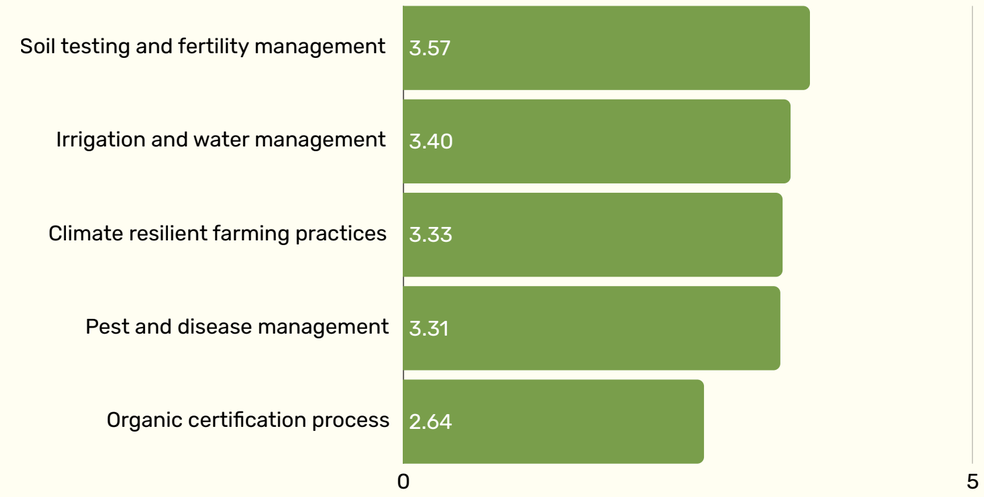
Education

Importance of education assistance programs



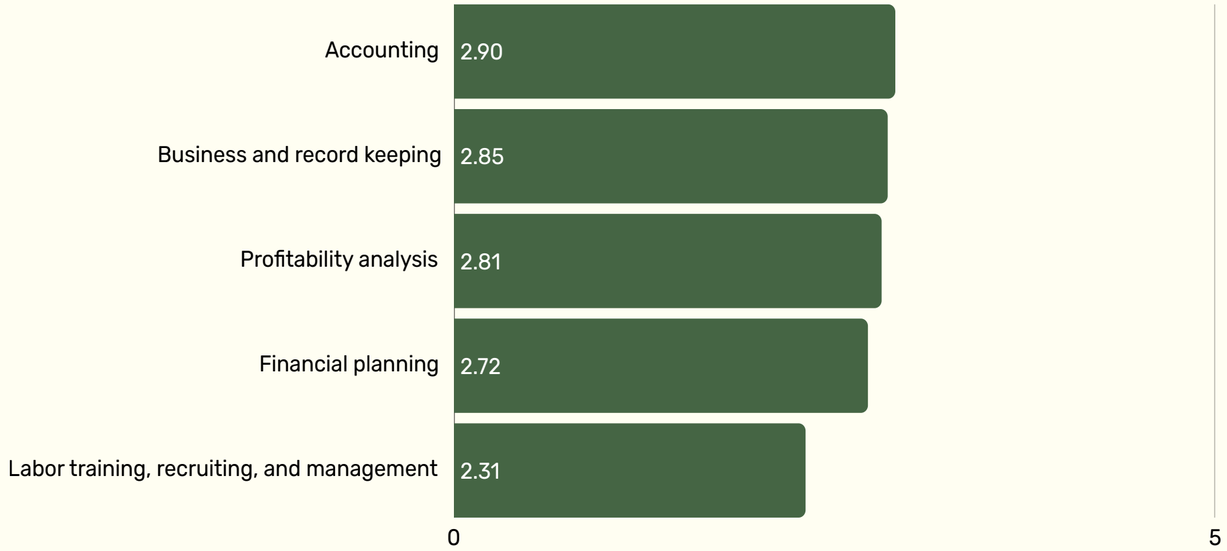
Technial

Importance of technical assistance programs



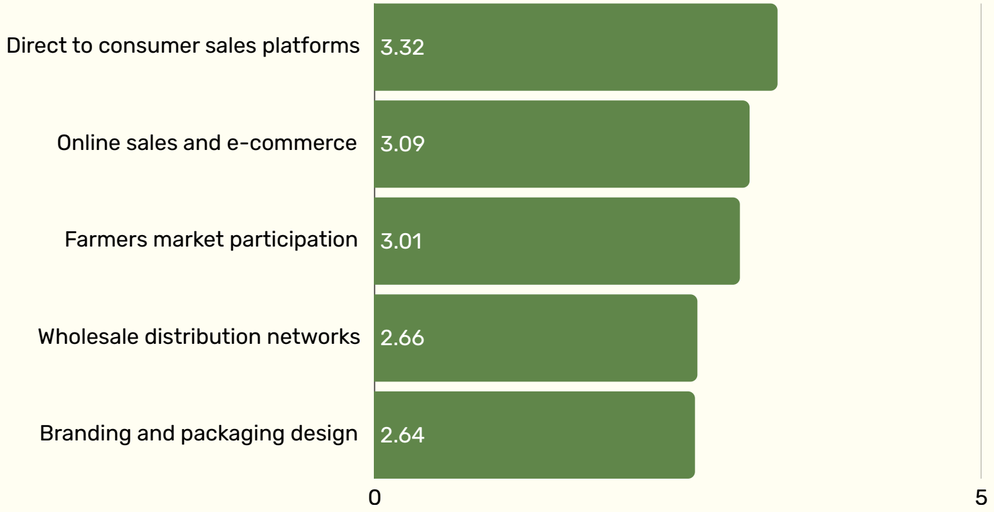
Business

Importance of business assistance programs



Marketing

Importance of marketing assistance programs



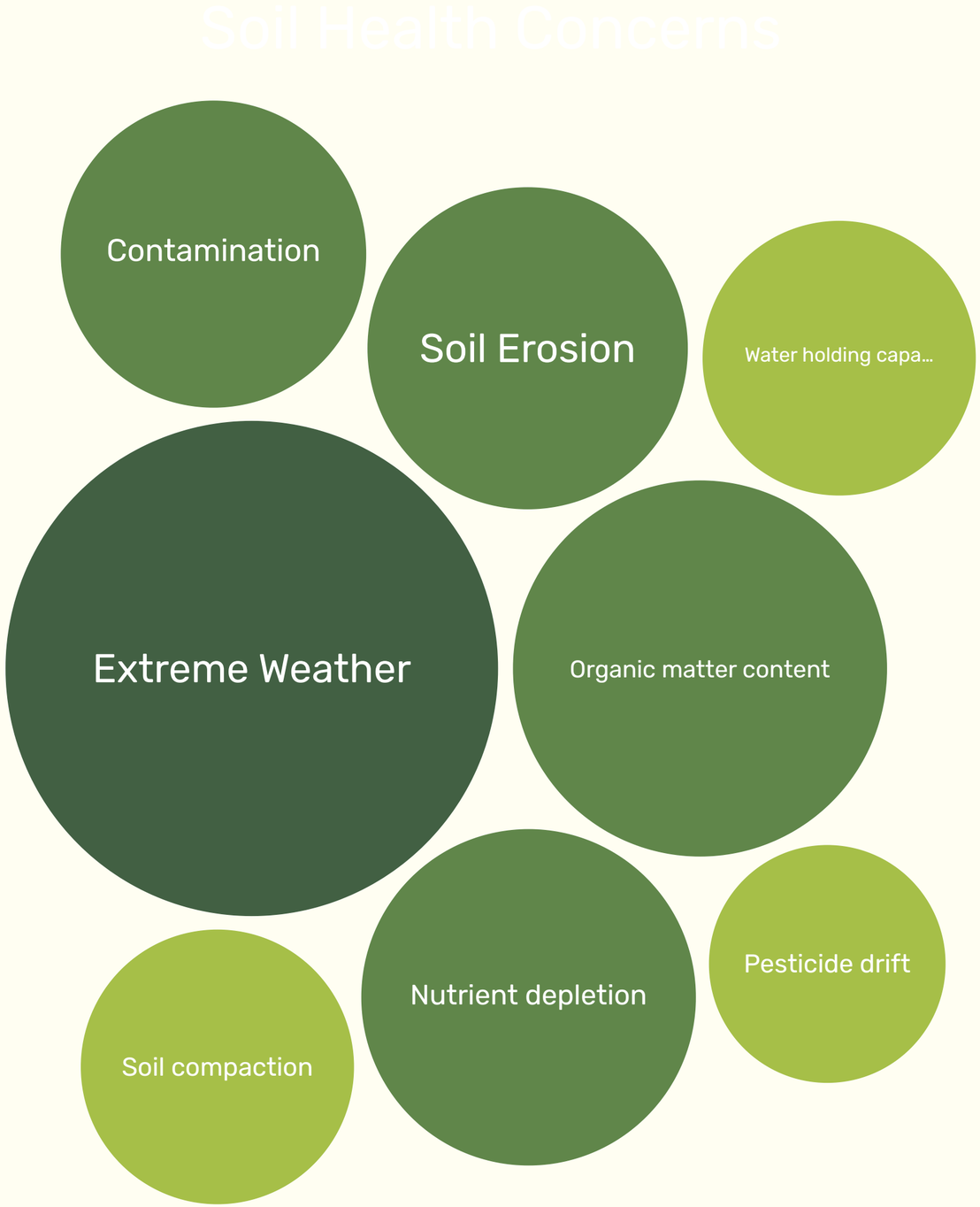
- **The top three out of five ranked are types of direct marketing!**

Climate & Soil

Soil health concerns and ratings

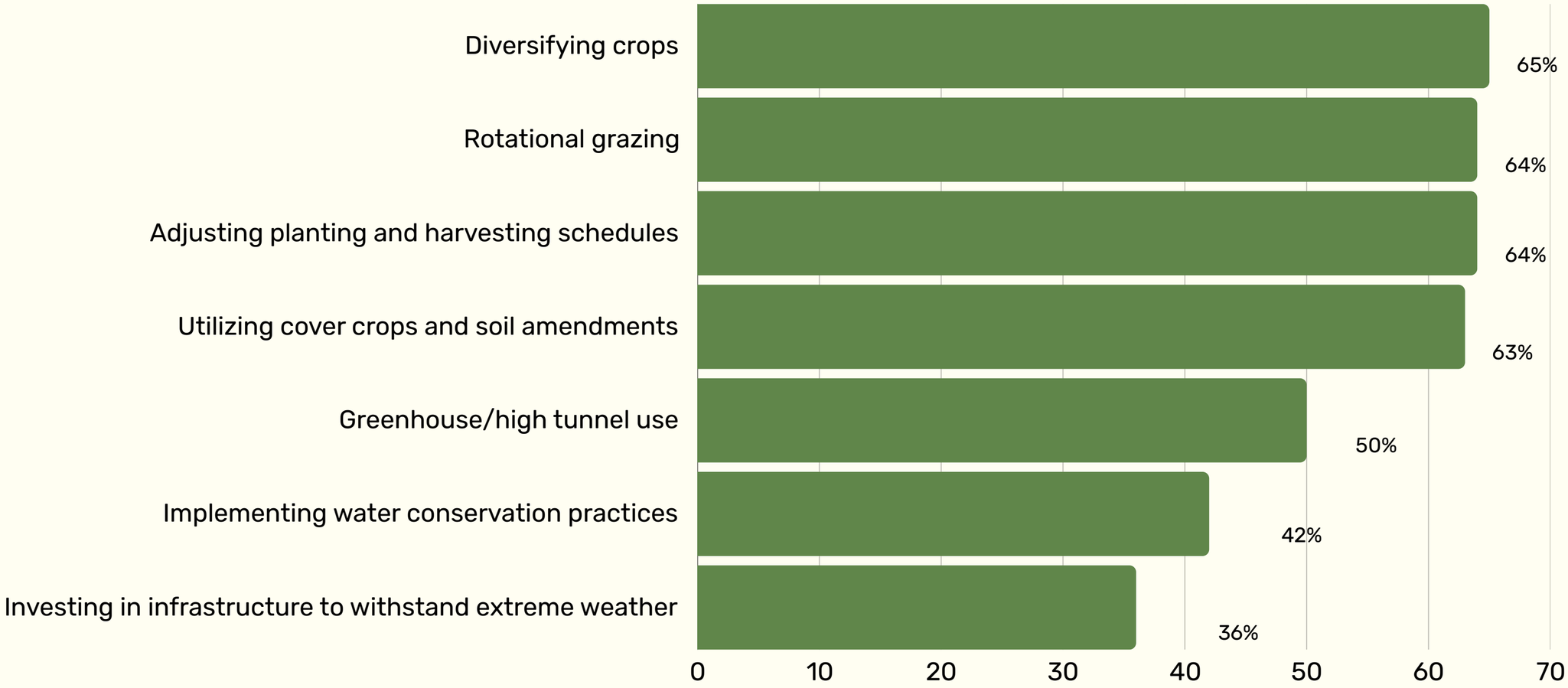
When asked to rank the top primary soil health concerns, these received the highest ratings.

1. Extreme Weather
2. Organic Matter
3. Nutrient Depletion
4. Soil Erosion
5. Contamination
6. Soil Compaction
7. Water Holding Capacity
8. Pesticide Drift



Climate & Soil

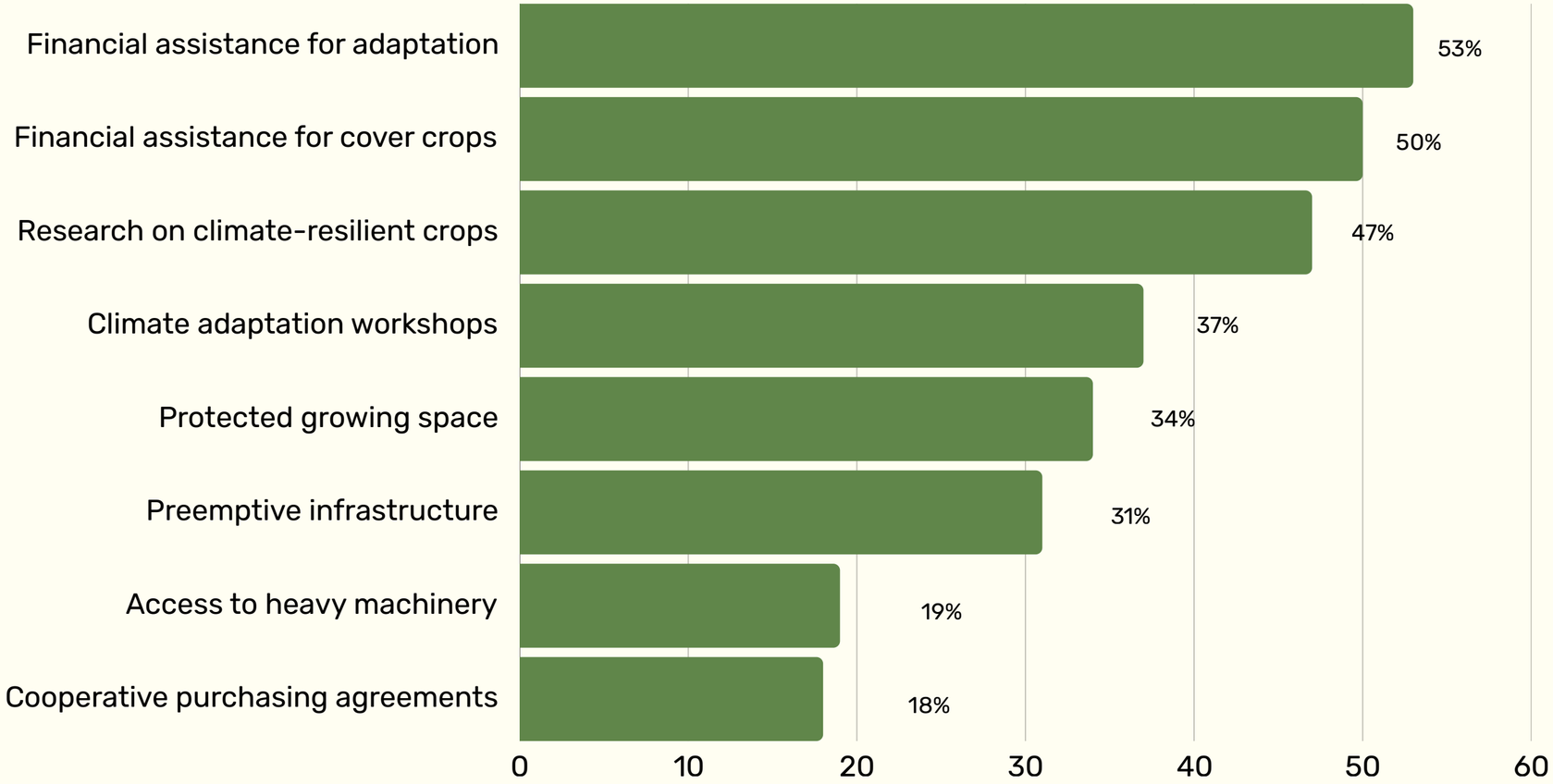
Farmers are taking a proactive approach to adaptation



What additional resources would help manage climate-related risks?

- In recognition that extreme weather is correlated with reduced yields and profits, we wish to place emphasis on the strategies that our farmers value as adaptations to the changing climate.

- Assistance for the financial burden of adaptation and cover crops rank highest, but these farmers are also asking for research on resilient crops and adaptation education.



Analysis of respondent comments

At several points in the survey respondents were invited to give open-ended responses in case the multiple choice selections did not reflect what they felt was most important to their operations. This brought to light several new areas of need. Here are some we selected as important:

- The need for greater clarity and support in navigating regulations. Respondents expressed frustration with overlapping and unclear requirements across agencies, including those related to water use, pesticide handling, labor laws, fire safety, and food processing regulations.

- Also related to regulatory burden, there are complaints the here is no single, clear pathway for farmers to understand compliance, and that this often becomes a barrier to entering or scaling farm operations. Suggestions included regulatory guides, legal support, and software tools to walk applicants through complex certification or licensing processes.

- The need for mental health care tailored to agriculture. Farmers acknowledged the stress and isolation associated with farming and expressed the importance of having mental health services that understand the unique pressures of agricultural life.

- Expansion of policy support—such as advocating for including meats, dairy, and value-added goods in FMNP and incentive programs.

- Several farmers emphasized the importance of cooperative systems and shared infrastructure, such as equipment rental programs, shared processing facilities, and coordinated transportation networks.

- There was significant concern about input access and supply chain development. Farmers described challenges in sourcing compost, seeds, livestock feed, and other critical materials locally. We would like to point out that the NexGen farming program of the NJ SADC has been developing a guide addressing this, and applaud the approach.

In Conclusion

Our Board's overwhelming impression from the survey results is that this population of farmers is passionate, hardworking, with some having "cracked the code" on regenerative farming that has sustainable profitability. In a time when farmers statewide are aging out of the industry, the youth in this sector offer a solution to the age skew. However, we see that the overall financial strain on these farms urgently needs to be addressed if the farmers are going to keep farming.

To re-state our key findings:

- The cost of farmland is the largest barrier for our farmers
- Many of these farmers concentrate on enterprises that have a low cost of entry, and support for diversification may unlock additional market demand
- Direct sales to individual customers are overwhelmingly how these farmers sell their products
- Extreme weather is a major concern
- The best chance of profitability is linked to being a business sized to employ and manage 11-20 people, indicating the need for refined business management skills
- Lower profitability farms report less engagement with support services, suggesting the better outreach by service providers can have important impacts

Programs addressing these points are the most critical. It is notable that there are points of overlap between these findings and those of the State Agriculture Development Committee's NexGen Farmer Program. The ORFB and its cooperators at Rutgers University are extremely open to collaboration with other entities to share subsets of the data to further service to the farmers in our state. Please consider yourself encouraged to ask us questions and ask for tailored data sets.

We look forward to advocating for mutually beneficial solutions with all partners.

About the Organic and Regenerative Farming Board:
The Organic and Regenerative Farming Board was created by an act of the NJ State Legislature in 2022. The duties of the Board are listed in NJSA: 4:10-80: Develop, administer, and oversee programs in consultation with the Department of Agriculture on topics related to organic farming, including the certification program established pursuant to 14 P.L.2003, c.176 (4:10-79), the federal organic farming certification program implemented by the United States Department of Agriculture, best practices for organic and regenerative farming; incentives to encourage more organic and regenerative farming in the State, new techniques to carry out organic and regenerative farming, and programs to provide outreach, education, and marketing support to organic and regenerative farms in New Jersey.

The Board hosts quarterly meetings, whose schedule and minutes can be found here:
https://www.nj.gov/agriculture/state-board/organicboard.shtml