

Rhodiola Rosea Market Opportunities Addendum

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2025 Update at a Glance

The *2025 Rhodiola Market Report* builds on the Alaska Food Policy Council 2024 *Alaska Rhodiola Market Opportunities Report*. The findings reflect a sector that is maturing rather than quickly expanding. Findings from two 2025 surveys and a December 2025 Rhodiola Workshop suggest that Alaska's rhodiola industry has moved beyond early feasibility questions and is now entering a transitional phase focused on coordination, infrastructure, and risk management.

What's new since 2024:

1. Clearer evidence of market pull, with most current growers selling most of their marketable product at or above market prices.
2. Significant expansion of in-state processing and extraction capacity, enabling Alaskans to capture more value beyond raw root sales.
3. More informed grower decision-making, with increased attention to disease risk, labor needs, certification logistics, and time to harvest.

What remains unchanged:

1. Persistent production constraints, including disease pressure, long establishment timelines, labor intensity, and limited access to organic certification services.
2. A lack of formal grower coordination, resulting in higher individual costs and slower collective learning.
3. Supply-limited growth, with downstream processing capacity outpacing current raw material availability.

Together, these findings indicate that the primary barrier to growth is no longer uncertainty about feasibility, but the absence of coordinated systems to support growers at scale. The 2025 update shifts emphasis from market validation toward targeted actions that strengthen grower networks, applied research, certification access, and alignment between production and processing capacity.

2025 Project Background

Following the successful 2024 market research initiative, the Alaska Food Policy Council (AFPC), in partnership with Oregon Tilth and the Northwest Transition to Organic Partnership Program (NW TOPP), undertook a series of follow-up activities in 2025 designed to track grower progress, understand the participation in organic certification, assess market changes in market conditions and interest, and strengthen community networking around rhodiola cultivation.

Updated Recommendations

The 2025 findings indicate that Alaska's rhodiola sector has moved beyond early market validation and now requires targeted, coordinated action to address shared constraints. The following recommendations build on the 2024 analysis and reflect grower priorities identified through surveys and workshop discussions. Together, they focus on strengthening collective capacity, reducing individual risk, and aligning production, certification, and market infrastructure to support sustainable growth at scale.

1. Organize and Support Growers

Grower coordination remains a foundational gap. Individual producers are navigating disease risk, certification logistics, and market uncertainty largely on their own, increasing cost and slowing collective learning.

1. **Support grower coordination:** Facilitate the formation of a rhodiola growers' group or cooperative to support shared production planning, peer learning around disease management, and aggregation of product for processing and export.
2. **Reduce organic certification barriers through coordination:** A coordinated grower structure could help:
 - Share organic inspector travel and inspection costs across multiple operations.
 - Develop rhodiola-specific organic system plan templates.
 - Provide guided recordkeeping tools that reduce administrative burden and uncertainty.
3. **Strengthen market access:** Support clearer pathways between growers and buyers, including Alaska Rhodiola Enterprises, outside wholesale buyers, and emerging local and regional retail channels.

2. Targeted Research and Extension

Production challenges—particularly disease pressure, yield variability, and site suitability—continue to shape grower willingness to expand. Addressing these challenges requires applied, Alaska-specific research and accessible technical resources.

1. **Expand applied agronomic research:** Increase UAF-led research focused on rhodiola disease management, weed control strategies, root size optimization, metabolite content, and climate stressors (including heat and drought) across diverse Alaskan regions.
2. **Develop Alaska-specific growing resources:** Commission or co-develop practical materials such as:
 - A “How to Grow rhodiola in Alaska” guide covering soil requirements, propagation, time to harvest, post-harvest handling, and organic considerations.
 - UAF Extension bulletins and digital tools tailored to rhodiola.
 - Plain-language troubleshooting guides for common disease and pest issues.
3. **Address data gaps:** Establish basic baseline data on grower numbers, acreage, yields, and realized prices to support decision-making and guide future investments.

3. Market and Policy Infrastructure

As processing and extraction capacity expands, stronger market and policy alignment is needed to ensure infrastructure investments are matched with production capacity and technical support.

1. **Establish recurring data tracking:** Implement a simple, ongoing data collection mechanism—such as an annual AFPC survey—to track grower participation, acreage, yields, realized prices, and utilization of processing and extraction capacity.
2. **Improve certifier accessibility:** Work with the Division of Agriculture, USDA, and certifying bodies to:
 - Explore options for bringing organic inspectors to Alaska on a regular schedule (e.g., quarterly or semi-annually), potentially coordinated through a grower group.
 - Increase uptake of existing USDA programs (OCCSP, RTCP, EQIP) through streamlined guidance and one-on-one assistance for small rhodiola producers.
3. **Support targeted capital investment:** Identify and align grant, loan, and cost-share opportunities to support:
 - Grower infrastructure (land development, equipment, greenhouse expansion).
 - Processing and extraction equipment.
 - Laboratory and testing capacity needed for quality assurance and market access.

Grower Survey

The 2025 grower survey was distributed to current rhodiola growers who had participated in the 2024 assessment or had subsequently engaged through AFPC programming and partner networks. The intent was to understand how real-world experience over the past year had shaped grower decisions, rather than simply whether interest remained.

Survey questions explored changes in acreage, production scale, and product movement, as well as the degree to which the 2024 market work had influenced planning or confidence. Growers were also asked directly about organic certification status, processing and labor challenges, and their willingness to participate in future collaborative efforts.

Six current growers and farm operators provided detailed responses, representing operations in Anchor Point, Anchorage/Sutton, Central Alaska, Soldotna, Wasilla, and Hydaburg. While small in number, respondents include some of the state's most experienced rhodiola producers. Their feedback reflects a consistent pattern: production is continuing, quality is high, and most sellable product is finding a buyer, but expansion decisions are cautious and tightly constrained by processing logistics, labor availability, changing world markets, and disease risk.

Aspiring Grower Survey

An updated survey of aspiring and newer growers captured emerging interest and changing demographics. Eleven individuals provided responses, representing communities from Cordova, Tok, Haines, Mat-Su, Salcha, Fritz Creek, Spruce Island, and Interior regions.

The aspiring grower survey targeted individuals who are either new to agriculture or considering rhodiola as a diversification strategy within existing operations. Compared to 2024, responses show a notable shift from curiosity-driven interest toward longer planning horizons and more deliberate decision-making.

Respondents were asked how their interest had changed since 2024, what new information they had encountered, and what factors were most influencing their willingness to move forward. Across regions, aspiring growers emphasized the need for clearer guidance on propagation, soil suitability, disease management, and post-harvest handling. Financing and access to planting stock also emerged as recurring concerns.

Many aspiring growers reported that exposure to the 2024 report, follow-up webinars, and conversations with existing growers had helped them better understand the realities of rhodiola production. While this tempered expectations around rapid returns, it also appeared to increase confidence among those who remain interested.

Rhodiola Workshop

AFPC organized a virtual workshop bringing together growers, processors, researchers, and technical assistance providers. The December 2025 Rhodiola Workshop served as a critical convening moment and provided a space for informal alignment around this emerging crop.

Key presentations included:

- Dr. Petra Illig (Alaska Rhodiola Enterprises): Updated market analysis, pricing trends, domestic and global sourcing, Alaska Rhodiola's expanded processing and extraction capacity, and capital needs for scaling manufacturing.
- Kristina Peterson (Oregon Tilth & USDA): Overview of organic certification pathways, certification requirements, costs, available support programs (TOPP mentorship, cost-share initiatives), and Alaska-specific certifier landscape.

Dr. Petra Illig's presentation reinforced the global context shaping Alaska's opportunity: tightening supply due to CITES restrictions on wild rhodiola, continued dominance of China in extract production, and rising buyer interest in traceable, cultivated material. Her overview of Alaska Rhodiola Enterprises' expanded processing and extraction capacity marked a clear inflection point, signaling that Alaska now has the technical ability to capture significantly more value, if sufficient raw material can be produced.

Kristina Peterson's presentation on organic certification provided clarity on pathways, costs, and support programs, but also underscored why certification remains challenging for small, geographically dispersed producers in Alaska. Workshop discussion consistently returned to the need for coordination, both to reduce individual burden and to make better use of existing support programs.

The meeting was recorded and has been added as a resource on the Alaska Food Policy Council's webpage, YouTube channel, and social media outlets

Building on the 2024 Report

The most important finding from the 2025 update is that the core analysis from 2024 remains valid, but the sector is now better positioned to act on it. The 2024 report identified market potential, structural barriers, and the need for coordination. The 2025 work shows that growers now broadly agree on those points and are asking more explicitly for mechanisms to address them.

Rather than widespread expansion, 2025 reflects consolidation of understanding. Growers are clearer about timelines, risks, and infrastructure needs. They are less interested in speculative growth and more interested in predictable pathways, clear expectations around processing access, certification support, and market demand.

In practical terms, this suggests that the next phase of work should focus less on proving that rhodiola *can* be grown in Alaska, and more on building the structure, grower networks, applied research, shared infrastructure planning, and technical assistance, that allows individual operations to succeed without carrying the full burden alone.

Key Themes:

Market Demand and Product Movement

Global demand for rhodiola remains strong, and ongoing CITES restrictions on wild-harvested rhodiola continue to constrain supply, increasing the strategic value of cultivated sources in Alaska. China remains the dominant producer of rhodiola extracts, accounting for approximately 75 percent of global dry extract volume, while Russia continues to supply wild-harvested material on a smaller scale. Buyer interest increasingly favors traceable, cultivated product with verified rosavin and salidroside content.

Alaska growers report receiving approximately \$60 per pound for raw rhodiola root, with some small batches achieving prices of up to \$100 per pound in 2025. At current production levels, most growers report selling 91–100 percent of their sellable product annually, indicating that demand is constrained primarily by supply consistency and volume rather than lack of interested buyers.

Product currently moves through three primary channels: Alaska Rhodiola Enterprises' retail and wholesale operations; limited outside wholesale buyers, including supplement companies purchasing small annual volumes; and direct-to-consumer sales by growers experimenting with value-added products. Overall, market conditions suggest that expanded, coordinated production could likely be absorbed at prevailing price levels if quality standards and supply chains are strengthened.

Grower Base and Production Trends

The 2024 report documented 20 aspiring growers and several current growers distributed across communities from Anchor Point to the Kenai Peninsula to Fairbanks. The 2025 follow-up surveys and workshop confirm at least 7 current growers and 11 aspiring growers, now spanning:

Current Grower Locations: Anchor Point, Anchorage, Sutton, Central Alaska, Wasilla, Soldotna/K-Beach, Hydaburg

Aspiring Grower Locations: Cordova, Tok, Haines, Mat-Su, Palmer/Wasilla, Salcha, Fritz Creek, Spruce Island, Nikolaevsk, Kodiak, Interior regions

This geographic diversity underscores Alaska-wide interest in rhodiola as a value-added agricultural opportunity.

Experience and Growth Patterns

Among current growers responding to the 2025 survey:

- Most report 6–10 years of rhodiola cultivation experience.
- At least one large operator with 10+ years of experience, currently purchasing from other growers in addition to home cultivation to supply manufacturing.
- Newer entrants (less than 2 years) cite the AFPC 2024 work, webinars, and Petra Illig's presentations as factors increasing their interest.
- Several are planning to scale up production or expand acreage in coming seasons, with confirmed plans for parcels ranging from test beds to 12–20 acre plantings.

Organic Practices and Certification Status

As in 2024, nearly all responding current and aspiring growers describe their practices as organic or "organic, non-certified." Very few use conventional approaches, indicating strong environmental and market alignment with organic principles.

Certification Interest and Barriers

Many current growers emphasize that the Certified Organic label adds monetary value, with one large buyer/processor noting that "most companies prefer certified organic and will pay more." Several aspiring growers explicitly connect certification to premium pricing and access to pharmaceutical or institutional markets.

Structural Barriers

Despite this alignment and demand, producers cite two primary deterrents to certification:

1. **Cost:** Annual certification fees, inspector travel costs (no in-state inspectors), and per diem expenses.
2. **Paperwork and Recordkeeping:** Perceived administrative burden in developing and maintaining organic system plans.

Even with awareness of USDA cost-share programs (e.g., OCCSP and RTCP), growers report that up-front fee payments and travel-related costs remain prohibitive for small and micro-scale operations.

Current Certification Landscape

As of 2025, Alaska has 25 total certified organic operations across all sectors; rhodiola operations are not yet a significant share of the statewide base. Oregon Tilth is identified as the primary certifier serving rhodiola growers in Alaska, with limited capacity from CCOF and other certifiers for coffee roasters and food handlers.

Processing, Extraction, and Value-Added Capacity

Alaska continues to have one primary commercial processor, Alaska Rhodiola Enterprises, operating root processing and manufacturing facilities in Anchor Point and Anchorage. Since the 2024 report, the company has significantly expanded its product line and technical capacity:

1. **Root Processing (Anchor Point):** Washing, cutting, drying, and initial quality control.
2. **Tincture Manufacturing:** Now producing approximately 70,000 two-ounce tincture bottles per year.
3. **Capsule Manufacturing:** Recently launched (as of late 2025), using dried root material.
4. **Extraction Facility (Anchorage):** Newly built facility capable of producing high-potency dry powdered extract suitable for premium capsules and other nutraceutical products, targeting the 3 percent rosavin and 1 percent salidroside levels that dominate global premium markets.

This represents a critical step toward vertical integration, positioning Alaska not only as a raw-root supplier but as a potential producer of finished extracts and branded products, including opportunities to process other Alaskan botanicals such as blueberries.

Capacity Constraints and Needs

Despite recent private investments in in-state processing and extraction capacity, several key bottlenecks continue to limit full utilization of this infrastructure. These constraints are interrelated and point to the need for coordinated action across production, research, and market support.

1. **Insufficient raw material supply:** Current grower production does not yet provide enough consistent volume to fully utilize extraction capacity, creating a mismatch between upstream production and downstream capability.
2. **Gaps in technical support and research:** Additional local laboratory capacity, expanded UAF-led research on disease management and metabolite optimization, and Alaska-specific Extension resources are needed to improve yield consistency and grower confidence.
3. **Manufacturing scale challenges:** Scaling extraction and capsule production requires access to capital and skilled manufacturing labor that exceed what individual producers or processors can address independently.

4. **Need for sustained state-level engagement:** Continued involvement from the Division of Agriculture is needed to better align grower development, processing investments, and market expansion efforts.

Without a more coordinated and scalable producer base, Alaska's expanded extraction capacity risks remaining underutilized, limiting the state's ability to fully capitalize on favorable global market conditions and CITES-driven supply constraints.

Conclusion

Alaska's rhodiola sector has progressed meaningfully since the 2024 market assessment, with documented grower expansion across more communities, sustained interest among new entrants, and significant new extraction capacity that positions the state to move beyond raw-material supply toward value-added products and higher margins. Price signals remain. Global demand is solid, and CITES restrictions on wild rhodiola continue to favor cultivated alternatives.

However, realizing the sector's full potential requires concerted action on grower coordination, disease management research, organic certification accessibility, and market infrastructure. The 2025 surveys and workshop confirm that growers seek not just technical knowledge but also practical support in navigation of regulatory processes, community connection, and market linkages.

With sustained partnerships among AFPC, Oregon Tilth, NW TOPP, UAF, the Division of Agriculture, and the emerging rhodiola business community, Alaska is well positioned to strengthen its role as a reliable source of cultivated and processed rhodiola. Proactive support for grower coordination and evidence-based extension will be key to supporting economic development, sustainable agriculture, and rural community resilience statewide.

This market update is intended as an addendum to the 2024 Alaska rhodiola Market Opportunities report.

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