

# Appendix 5

## Phase I Data collection results

- Phase I survey results
- Phase I interview results

## **SARE Farmers and Growers Survey Summary**

*September 30, 2011*

The Portland metropolitan area is well known nationwide for its cutting edge sustainability vision, urban development and farmland protection framework. The region has a large number of productive small farms that are located within and near urban areas. There is a growing interest in, and support for, locally grown, sustainable food. This interest is driven by rising concerns over public health, food security, transportation costs, climate change, jobs and the economy, and the search for a more community-based, sustainable lifestyle. There is growing support for farmers markets, community supported agriculture (CSA), community gardens, local healthy food school programs and institutional purchases of fresh, locally grown produce. Increasing locally-sourced fruits and vegetables is also a goal of the Regional Food Bank.

Western Sustainable Agriculture Research and Education (SARE) is funding a study to examine key agricultural trends, identify producer needs and define strategies to strengthen the local food production system. The goals of the study are to:

- Define the Portland Metropolitan Foodshed, identify related agricultural and economic trends and develop a needs assessment based on input from producers and other stakeholders.
- Assemble a regional toolkit of strategies to support evolution of a sustainable Portland Metropolitan Foodshed.
- Work with the City of Damascus, Oregon to test the toolkit on a local level.
- Develop a research and educational program that supports these goals and supports small and medium farmers in the region.

As part of this study, an online survey was distributed to farmers and growers in the Portland region. The survey was completed by 81 growers and farmers. Along with interviews conducted with five core farmers in the regional foodshed, the results of this online survey of farmers and growers reflect a range of farming operations and will be used to show the impacts of urban development on small and mid sized farming operations. A summary of survey results follows.

### **1. What were your annual gross farm sales in 2009?**

Farmers' annual gross sales ranged from \$0 to \$1.6 million with a median of \$22,000. Eight respondents reported sales of \$500,000 or more. Several respondents indicated \$0 in sales because they did not start farming until 2010.

### **2. How many acres were involved in generating the gross farm sales in Question #1?**

More than 4,200 acres were involved in generating gross sales, with individual responses ranging from zero to 850 acres. The average number of acres is approximately 53 with a median of six acres.

### **3. How many acres do you own v. lease?**

More than 90 percent of respondents own the land they farm and 79 percent lease farmland. Approximately two-thirds of the total acreage is owned and one-third is leased.

#### 4. What is the primary source of the gross farm income in Question #1?

- Sixty-seven respondents reported that crops represent a portion of their gross farm income; 55 indicating crops are the primary source of income.
- Thirty-two respondents indicate that a portion of their gross farm income is generated by livestock; 13 indicate it is the primary source of income.
- Nineteen farmers report that value added and processing activities account for a portion of their gross farm income and the primary source of income for three respondents.
- Twelve respondents report that they generate revenue from non-edible crops; they are the primary source of income for one respondent.
- Seven respondents receive income from other sources such as herb and vegetable starts, honey, compost products and educational services; two indicate that these are the primary source of the gross farm income.

#### 5. What county is your residence located?

County	Residences
Multnomah	21
Clackamas	20
Washington	12
Yamhill	6
Benton	5
Linn	4
Columbia	3
Lane	2
Polk	2
Clark, WA	1
Coos	1
Deschutes	1
Marion	1

#### 6. What is the age of the principal owner(s) of this farm?

The average age of principal farm owners is approximately 47 years old with a median age of 46.

#### 7. Do you plan to transfer land/farm ownership?

Approximately 56 percent of respondents do not plan to transfer land/farm ownership.

If you answered yes to question #7, to whom will you be transferring ownership?

Ownership Recipient	Responses	Percent
Family member	19	66%
Transfer to family trust	6	21%
Employee	2	7%
Donate to a nonprofit organization	1	3%
Transfer to land trust	1	3%

Other:

- Don't know (2)
- Adding LLC members but also exploring other structural options

- Already a land trust
- Combination of Land Trust and sell for non- ag use
- If not an employee then to a business partner
- Partner
- The next generation of UFC volunteers

If you answered yes to question #7, is your plan formalized in a legal document, such as a will?

Approximately 72 percent of respondents do not have their plans formalized in a legal document.

If you answered yes to question #7, do you need assistance in the following areas?

More than 86 percent of respondents need assistance with legal issues. 80 percent need assistance with tax issues. One respondent indicated they need assistance with a business plan for a new operator.

**8. Is your main business goal to obtain farm tax deferral from your county tax assessor’s office?**

Less than eight percent of respondents indicate that obtaining farm tax deferral from their county tax assessor office is their main goal.

**9. Do you perform additional processing or packaging to your products before your sell to a customer?**

Approximately 35 percent of respondents perform additional processing or packaging to their products before selling them to a customer.

**10. Does your farm activity require non-farm supplemental income to stay in business?**

More than 68 percent of respondents’ farm activity requires non-farm supplemental income to stay in business.

**11. How do you connect to your customers? Select all that apply.**

Method	Responses	Percent
In person	45	96%
Website	34	73%
Phone	27	64%
Facebook	23	46%
Twitter	4	6%

Other:

- Email (9)
- Local Harvest, Food Hub and other websites (8)
- Farmers markets (2)
- Signage (2)
- Farm networking
- Flyers at local stores
- Meetings, like the farmer-chef connection
- Networking through customers
- Paper advertising

**12. Do you need help connecting with your customers?**

Approximately 30 percent of respondents indicate they need help connecting with customers.

**13. Are you aware of existing methods for customer connections, such as Food Hub, etc.?**

More than 86 percent of respondents are aware of existing methods for customer connections such as Food Hub.

**14. Could a “Brand” add value to your products and markets, such as a “Willamette Valley Grown” etc.?**

Nearly 62 percent of respondents indicate a brand could add value to their products and markets.

**15. Where do you currently market/sell most of your farm products?**

- Farmers markets (37)
- CSA (34)
- On farm, farm stand, direct sales to customers/friends/local community (23)
- Restaurants (14)
- Wholesale (8)
- Food Hub, Local Harvest, Farm Loop, Craigslist, Facebook (6)
- Grocery stores (3)
- Portland (3)
- Distributors (2)
- Other farmers (2)
- Buying clubs
- Cooperative
- Farm supply outlets
- Food carts
- Garden stores
- Livestock auction yard
- Madras
- Processor
- Retail nurseries
- Statewide
- U-Pick

**16. Are you satisfied with your current market outlets?**

Nearly 37 percent of respondents are not satisfied with their current market outlets.

**17. Which of the following geographic markets are the targets for you in the next five years?**

<b>Geographic Market</b>	<b>Responses</b>	<b>Percent</b>
Metro Area	65	93%
West Coast	11	16%
International	3	4%
National	2	3%

**18. How much of your annual farm sales are generated from organic production?**

More than 56 percent of respondents indicate that all of their farm sales are generated from organic production. 12 percent responded “some” and 32 percent said “none.”

If some or all of your production is organic, do you use organic production as:

<b>Organic Production Method</b>	<b>Responses</b>	<b>Percent</b>
Marketing tool	37	67%
Stewardship practices	55	100%
Safety practice to family employees	49	89%

What type of third party certification system, if any, do you use?

<b>Certification System</b>	<b>Responses</b>	<b>Percent</b>
None	50	76%
Oregon Tilth	15	23%
USDA Organic	2	3%
Food Alliance	1	2%
Oregon Dept of Ag	1	2%
Salmon Safe	1	2%

**19. How far do you travel to market or sell your farm products?**

The distance that respondents travel to market or sell their products ranges from a zero (on farm sales only) to several hundred miles. For farmers who do travel, the average distance traveled is 46 miles with a median distance of 30 miles.

**20. Are there crops or livestock that you would like to grow that you currently are not?**

58 percent of respondents indicate that there are crops or livestock they would like to grow that they currently are not.

**21. What technology would help you in marketing your products?**

<b>Technology</b>	<b>Responses</b>	<b>Percent</b>
Website	48	96%
Facebook	25	50%
Twitter	8	16%

Other:

- Radio (2)
- Software for live inventory on interactive website for ordering
- A major marketing campaign explaining CSA
- Better online storefront
- Don't know
- News coverage
- Not familiar enough with Twitter to know
- Print media
- We are active on our site and facebook, but I'm sure twitter could serve us in some fashion
- We have a web page but need to expand our marketing
- We use all these, they help

**22. Are there barriers for you to effectively marketing your product?**

More than 52 percent of respondents indicate that there are barriers to effectively marketing their products. Barriers include:

- Not enough time (17)
- Access to capital (9)
  - Expand marketing and outreach/delivery (2)
  - Develop an online presence
  - Host on-farm events
  - Abattoir capacity
- Lack of marketing expertise (7)
- Regulations (5)
  - Food safety laws (4)
  - Organic certification
- Need to educate customer base (3)
- Acronym “CSA” (2)
- Seasonality of markets (2)
- Cheap food imported from low-wage countries
- CSA market saturation
- Failing economy
- Gray area for small-scale produce selling within the city
- Non-farm employment
- Unethical/untruthful competition

**23. Do you need assistance with marketing support?**

More than 59 percent of respondents indicate a need for assistance with marketing support.

**24. Are you satisfied with the size and productivity of your operation?**

Twenty percent of respondents indicate they are satisfied with the size and productivity of their operation. Of the 80 percent who are not satisfied:

<b>Response</b>	<b>Responses</b>	<b>Percent</b>
Would like to both expand output/revenues and reduce costs.	41	51%
Would like to increase output/revenues.	22	27.5%
Would like to reduce costs.	1	1.3%

**25. Would you like to increase your land base?**

Fifty percent of respondents would like to increase their land base.

If you answered yes to question #25, the reason to increase your land base is to:

Reason	Responses	Percent
Potentially create a new market opportunity not otherwise obtainable with current acreage	23	62%
Meet the demand in current market strategy	20	54%
Gain economies of size with equipment	16	43%
Have family members that would also like to farm and this would allow them the ability to farm as well	10	27%

Other:

- Increase sustainability of operation through long-term rotations and soil building
- Increase the fertility sustainability of the farm through increasing herd size
- Our nonprofit model seeks to improve communities
- Provide jobs for family so we are self-sustainable
- Seed saving
- To provide incubator services for others who would like to enter into the field of small scale intensive farming
- Train new farmers

**26. If you were to expand your business, how would you pay for additional farm inputs, equipment, land, buildings or other expansion?**

Payment Method	Responses	Percent
Self/Family	53	84%
Commercial lender	14	22%
Investors	12	19%
FHA	2	3%

Other:

- CSA membership (3)
- Fund raising efforts; grants (3)
  - New Farmers grants
  - Rainwater harvesting
- Can't due to lack of access to capital (2)
- After we purchase the farm, can rent/borrow equipment from parents who are also farmers
- Farming operation is separate from our food product, from our farm crop. The food business would have to be invested in by private investors.
- Have about exhausted own savings and resources
- Micro-financing.
- Need all of the above
- Planning on investing in another small food business by way of a zero-interest micro loan. In addition putting all gross profit back into the business to expand and grow and will continue to do so for the next 5 years.
- Private lender
- Working with MercyCorps NW matched savings program



**27. Are you interested in joining a Cooperative or other similar organization?**

- Approximately 57 percent of respondents are interested in joining a cooperative or other smaller organization.

If you answered yes to question #27, what is the most important reason?

Reason	Responses	Percent
Access to equipment	13	29%
New market opportunities	14	31%
Better access to inputs	6	13%
Expand current market	6	13%
Lower cost	6	13%

**28. Besides yourself, how many family members work for your farming operation full-time?**

Responses ranged from zero to five with an average of one additional family member working for farming operations full-time.

**29. How many family members work for your farming operation part-time?**

Responses ranged from zero to ten with an average of 1.4 family members working for farming operations part-time.

**30. How many non-family employees work for your farming operation?**

Responses ranged from zero to 100 with an average of seven and median of one non-family employees working for farming operations.

What percent of your employees in Question #30 are local?

More than 88 percent of respondents use local employees and nearly 60 percent use migrant workers.

Is your labor force stable (available when needed)?

More than 83 percent of respondents indicate that their labor force is stable.

Is your labor force adequately skilled for the tasks expected of them?

80 percent of respondents said that their labor force is adequately skilled.

**31. What do you need to increase your capacity to generate new markets, increase revenues, or reduce costs?**

- Capital (10)
- Land/water rights (10)
- Time (10)
- Labor (6)
- Equipment/mechanization (4)
- Lower costs (4)
- Stronger economy (4)
- Higher prices (2)
- Less corporate competition (2)

- Management assistance (2)
- Marketing assistance (2)
- Reduced regulations (2)
- Ability to butcher more livestock
- All-season farmers market
- Better distribution
- Better educated customer base
- Higher, more efficient production
- Local access to organic inputs and sustainable packaging
- Partner
- Rainwater harvesting storage
- Specialize/more processing

**32. What is the biggest barrier to producing your product for your market?**

- Weather (13)
- Capital (13)
- Land (12)
- Labor (9)
- Regulations (7)
- Time (7)
- Low prices/values/profits (3)
- Processing/packaging (3)
- Fuel costs (2)
- Water access/costs (2)
- Certification process

**33. What technology would help you in producing your products?**

- Propagating/harvesting (14)
- Packaging/processing (7)
- Greenhouse/hoop houses (5)
- Information technology/management software (4)
- Water storage/efficiency/irrigation (4)
- Certified commercial kitchen (2)
- Compost turner (2)
- Energy efficiency (2)
- Refrigerated storage (2)
- Weather forecasting (2)
- Extension agents
- High tunnels
- Pesticides
- Tool lending library

**34. Do you have conflicts in your ability to produce your products in a safe and efficient manner?**

77 percent of respondents have conflicts in their ability to produce their products in a safe and efficient manner.

If Yes, what is the main conflict?

- Neighbors/pesticide and herbicide drift (4)
- Government regulation (3)
- Transportation (2)
- Vandalism/theft (2)
- Sanitation
- Time
- Unclear definition of safe food requirements.

If Yes, whom do you have the most conflict with?

Barrier	Responses	Percent
Local government	8	47%
Non-farm neighbors	7	41%
Other farmers	2	12%

Other:

- Federal regulations
- GAP
- Local regulations
- Neighbors
- State regulations

**35. What other regulatory barriers do you face?**

Barrier	Responses	Percent
Certification systems	26	53%
Land use, permitted uses	26	53%
Water rights and supply	22	45%
Labor laws	17	35%
Farmers markets rules and regulations	16	33%
Tax structure	10	20%
Transportation access	2	4%
Air quality rules	2	5%

Other:

- Food safety regulations (5)
- Certification costs
- DEQ
- Unfair off shore supplies that undercut markets
- Water quality protection
- Zoning regulations

**36. What is your chief regulatory challenge?**

Challenge	Responses	Percent
Certification systems	23	42%
Diversification on site	11	20%
Labor regulations	10	18%
Land use	5	9%
Water supply	5	9%
Water pollution	1	2%
Air quality	0	0%

**37. What level of government is the most important to your operations?**

Government	Responses	Percent
State	22	36%
County	17	27%
Federal	7	11%
Soil and Water Conservation District	6	10%
Cooperative Extension	5	8%
City	4	7%
Regional (Metro)	1	2%
International	0	0%

**38. Where are the opportunities to expand your markets?**

- Local/on-farm/local markets/schools (10)
- CSA (6)
- Consumer awareness/education (4)
- Metro region (4)
- Restaurants (4)
- Everywhere (3)
- Portland (3)
- Value added markets (3)
- Direct marketing during off-season (2)
- Farmers markets (2)
- I-5 corridor, Seattle to San Francisco (2)
- Internet (2)
- Nationally (2)
- Agritourism
- Beer, wine and spirits production
- Collective gardens on public lands
- Each customer buying more
- Farm supply outlets
- Internationally
- Nursery
- Other farms
- Tri-county area
- Wholesale/stores

**39. What are the pros and cons related to organic certification or other certification?**

Pros	Cons
Marketing/branding/market expansion (11)	Cost (29)
Credibility/consumer confidence (10)	Administrative process (19)
Price (3)	Minimal benefit (11)
Right thing to do (2)	Lax certification laws/meaningless (7)
Support (2)	Too restrictive/lower yield (5)
	Customers unlikely to pay for increased production costs (3)
	Scarcity of organic livestock feeds (2)

**40. What is the most important need to improve your operation?**

- Infrastructure/equipment (13)
- Capital/money/financing/ (11)
- Labor (8)
- More profit/reduced costs (6)
- Land (5)
- Customer demand/public education (4)
- Government support/regulatory changes (4)
- Partner/management succession (3)
- Water (3)
- Marketing (2)
- Time (2)
- Decentralized distribution system
- Education/training
- Better weather
- Better processing

**41. How has increased awareness of environmental stewardship changed your operations?**

- No change; have always been environmental stewards (17)
- Changed practices; improved/added value (6)
- Improved pasture/farm management (7)
- Increased consumer education/interest (6)
- Fewer chemicals (5)
- Reason for farming (4)
- Conserve energy (3)
- Increased biodiversity (3)
- Improved water quality/management (3)
- None (2)
- Recycle plastic (2)
- Invested in organic certification

## SARE Farming Interest Survey Summary

### October 6, 2011

The Portland metropolitan area is well known nationwide for its cutting edge sustainability vision, urban development and farmland protection framework. The region has a large number of productive small farms that are located within and near urban areas. There is a growing interest in, and support for, locally grown, sustainable food. This interest is driven by rising concerns over public health, food security, transportation costs, climate change, jobs and the economy, and the search for a more community-based, sustainable lifestyle. There is growing support for farmers markets, community supported agriculture, community gardens, local healthy food school programs and institutional purchases of fresh, locally grown produce. Increasing locally-sourced fruits and vegetables is also a goal of the Regional Food Bank.

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- Work with the City of Damascus, Oregon to test the toolkit on a local level.
- Develop a research and educational program that supports these goals and supports small and medium farmers in the region.

As part of this study, an online survey was distributed to people potentially interested in becoming farmers in the Portland region. The survey was completed by 12 respondents. Survey results help gauge local interest in new farming operations. A summary of survey results follows.

#### 1. What has been your exposure to the agriculture industry?

Exposure	Responses	Percent
Worked or currently work on a farm that generates revenue	4	33%
Worked or currently work in a garden that is not operated as a business	2	17%
Interested in exploring the operation of a revenue generating farm	6	50%

#### 2. What has sparked your interest in farming?

56 percent of respondents are interested in improving the quality of food available in the region. 44 percent indicate that the potential of farming as a business sparked their interest in farming. Other responses include:

- Worked for Nash’s Organic Produce but mostly because growing food, marketing, and cooking foster connections between all of us.
- Getting out of the city to live a closer relationship with nature.
- Work for the Farm Service Agency in SW Washington and am an advocate for USDA programs that will benefit smaller scale farmers who are often organic or transitional.
- Think the quality of food available in the Portland area is great, and am interested in producing

food for Portland consumers.

- Interested in improving the quality of food available in the region.
- Connection between food, environment, and community; and the ability to do what I love for a living.

### **3. How did you become introduced to the idea of farming as a business?**

- Was the produce manager at an urban food co-op, started to source from farms; then visit them, then volunteer at them.
- It has been in the family.
- From reading about it.
- Small Farmer's Journal, working horses in harness, growing my family's vegetables, my mother and great aunt, eating.
- A windfall nearing retirement that allowed me to buy land.
- I purchased several acres of farmable land.
- It is a personal choice. Grew up on a farm, moved to the city, graduated from different colleges, worked in the corporate world, very tired of the office work, and ready to work outdoors.
- I worked at Sunbow Farm in Corvallis and prior to that, served as an Agricultural Advisor for the US Peace Corps in Mongolia (partnered with Mercy Corp and USAID) working with herders to start vegetable production for the first time in their histories between 2003-2005. Prior to that, lifelong agricultural experiences at grandparents farm in Eastern Kentucky.
- I worked for a restaurant that bought products from local growers, then I apprenticed at a local farm to learn about running a small farm as a business.
- I have family members that are farmers and friends that are farmers and I work in the farmers market industry.
- Myself.
- Was a farm apprentice for one year and got to see the internal business operations as well as take some classes about Whole Farm Management.

### **4. What assistance have you received in moving toward the goal of operating a successful farm?**

- None. (4)
- Tons of verbal support.
- Research, research, research. Educating myself.
- Currently enrolled in Multnomah County's Beginning Urban Farming Apprenticeship (BUFA) program.
- Food Bank provides assistance towards our urban farm in North Portland. We have been given rain barrels by the food bank. Also, neighborhood partnerships have led to a successful neighborhood egg co-op, and work share projects on Sauvie Island. We have received no assistance from federal/USDA programs or grants.
- None. I have moved myself toward operating a farm by continuing to work on local farms and by completing OSU's growing small farms class.
- Aero. There's not a lot of encouragement out there for this kind of thing.
- Partial scholarship to growing farms program.
- Apprenticeship classes; mentor.

## **5. What barriers are currently preventing you from moving forward with your plans for operating a farm as a business?**

- Not enough farmers markets, places to sell produce. Cost of food is very low. Farming is huge huge amounts of work and it is almost impossible to make a living/have health care. Also very few banks interested in giving loans to farmers for land. Certification for organic status is very costly.
- Allocating the necessary time.
- Funding and available labor.
- My daughter has one more year of high school.
- Capital acquisition.
- Little demand for locally and naturally grown foods.
- In general, the barriers experienced by the producers in Western Washington are a result of county taxation but also the absence of farm programs sponsored by the USDA that could benefit small scale, or just simply organic producers.
- Money. I don't have enough money to start my own operations, and I can't survive without making a paycheck. Also, I'd like to gain a little more experience and knowledge about tractoring and building farm infrastructure (greenhouses, irrigation lines, etc.)
- Land, capital.
- Practical experience.
- Capital. Access to land (goes back to capital). Market analysis (need a place to grow, and need to know there is a diverse market opportunity there so that I can make a living/keep farming). Health Insurance (goes back to having capital). Having a business partner (I don't want to farm alone).

## **6. What kinds of assistance do you feel would help lower those barriers?**

- Government support and increased awareness of the actual cost of food.
- Low interest loans for starting new project.
- Knowing what crops would likely have the most chance for success.
- 1)FoFF has offered to provide help with convincing local conventional farmers to transition, 2) How to find reliable help as I set up infrastructure, 3) Grant opportunities.
- Just completing my education, toward my end.
- Education about resources and opportunities for grants and other funding sources for organic farming.
- More education and increase awareness of the people of Portland Metro area about the benefits of local, seasonal, organically/naturally grown food.
- I think about this often, but I have yet to come up with a program that would help farmers from the National USDA office. I think that those who own agriculturally designated land should be provided with incentives to keep the land in ag. Much like the FSA's DCP program, there needs to be incentives paid that make the landowners want the land kept tillable, versus trying to find ways to get the land rezoned in order to sell it for a subdivision. In addition, I feel that since crops are being subsidized at the national level by the USDA in the grain producing areas of the nation, subsidies could also be paid to organic producers to offset some of their heavy labor costs. The main thing that needs to change is education. People need to be educated about the values of organic food and more importantly, local food. Perhaps incentives could be paid to local producers and local buyers by the USDA for the savings of fuel in transportation of distant grown food, chemical inputs, environmental impacts, etc. We simply need an education campaign that



explains the cons to purchasing the cheapest food produced and explains how the rest of the world pays for their food. People need to buy local to help local economies, help the environment, improve health, and value quality food. Only education can slowly make these changes.

- Access to affordable land, access to small business loans, access to some farm equipment (maybe shared) without having to purchase it.
- Long-term lease options.
- More assistance available to get started.
- Better grants/loans for beginning farmers to help w/land acquisition. Farmer health insurance co-op.

## **Notes of Results of FoodShed Survey at NWHS Meetings**

### For the Foodshed committee:

*This survey was conducted at the North Willamette Horticulture Society Meeting held January 11-13<sup>th</sup>, 2011. Three producer-group sessions were held, one each day, over the course of the meeting. The survey was administered each day. Some individuals stayed for the duration of the meeting; thus respondents were asked to answer survey questions only one time, on the first day they attended a session, even though they may have been a part of more than one producer group. Additionally, each farm attending the meeting had only one respondent, to avoid duplicate responses. The organic session was administered on the first day of the meeting, vegetables on the second, and berries on the third day. As such, berry producer participation for the survey is expected to be low and the berry data may not be entirely representative, since many berry producers already responded in another session.*

*There were five individuals who responded to only one to four questions. The survey answers from these individuals were left in this data set, but may be excluded in future analyses.*

### **Slide 1: County of Residence**

Sixty-two percent of all respondents reside in the Portland-Vancouver Metro area (Clackamas, Washington, Multnomah, and Clark counties). Fourteen percent of all respondents reside in Marion county. None of the respondents of this survey were from Columbia county, and only 2% were from Polk county. The remaining respondents were from Yamhill (6%), Linn or Benton (5%) or other counties (9%).

Please note that the berry session's county of residence is not representative of actuality. The major berry producing counties include Marion and Clackamas county.

### **Slide 2: Principle Farm Operator Gender**

Eighty-seven percent of all sessions surveyed stated that the principle farm operator is male. This is similar to the U.S. average of 86% male principle farm operators (U.S. Census of Agriculture, 2007). The statewide average for Oregon, however, reveals that 78% of farmers are male and 21% are female. (U.S. Census of Agriculture, 2007).

The results for the organic session, which has a higher average of female principle operators (23%), is also similar to the U.S. average of 22% female principle operators, (U.S. Census of Agriculture, 2007), and closer to the statewide average for Oregon.

### **Slide 3: Principle Farm Operator Age**

The average age of an Oregon farmer is 57.5 years old (U.S. Census of Agriculture, 2007). This is similar to our results which indicate that 32% of farmers surveyed were between the ages of 51 and 60 years old, with 73% of farmers surveyed between the ages of 41 and 70 years old.

Only 4% of farmers surveyed were under the age of 30. The U.S. average of principle farm operator's under the age of 25 is 0.5% (With 4.8% of U.S. farmers from 25-34 years of age).

### **Slide 4: Percent of Principle Operator's Total Household Income that comes from the Farming Operation**

The results of this survey show the majority of farmers are either full time farmers (33%) or lifestyle farmers (27%).

In Oregon, 46.2% of producers list farming as their primary occupation; however, 65.8% of farmers partly work off-farm. (U.S. Census of Agriculture, 2007).

Nationwide, 36% of all farmers are lifestyle farmers and 21% are retirement farmers; these two groups make up the largest portion of farmers nationwide. Both groups gross less than \$250,000 a year and have either a primary occupation off the farm or are retired.

#### **Slide 5: Satisfaction with the Size & Production of the Operation**

The majority (56%) of all farmers surveyed would like to expand both output and revenues, while reducing costs on their farm. Meanwhile, the highest percent of farmers satisfied with their size and productivity were organic producers (35%).

#### **Slide 6: 2009 Gross Farm Sales**

Forty five percent of producers surveyed had 2009 gross sales of \$250,000 or more.

Contrary to this survey, nationwide, only 9% of large and very large farms grossed over \$250,000 in sales. Statewide, in Oregon, 83% of farms gross less than \$50,000 annually (U.S. Census of Agriculture, 2007), while this survey shows that 32% of respondents grossed less than \$50,000 in 2009.

#### **Slide 7: Total Acres Generating to Gross Farm Sales**

Forty-one percent of producers surveyed are farming 100 or more acres. Organic session respondents are more likely to farm small acreages of less than 5 acres (22%) than are other session respondents.

Contrary to this survey, the statewide average in Oregon indicates that 25% of farms are <10 acres, and 62% are <50 acres, with farms in the Northern Willamette region being smaller than the statewide average (See slide 23).

#### **Slide 8: Percentage of Owned versus Leased Land Contributing to Gross Farm Sales**

Fifty-four percent of the producers surveyed either own all or the majority of their land. Organic farmers are more likely to lease a majority of their land (61% of organic producers lease 50-100% of their acreage).

#### **Slide 9: Farm Operation Acreage Uses**

Eighty-five percent of the producers surveyed have farms that are primarily cropland. This percentage is higher than the state and national average due to the type of producers that were gathered at the NW Horticulture Society meeting, when the survey was conducted.

#### **Slide 10: Percentage of Gross Farm Sales from Processing/Packing of Products**

Over half (52%) of session participants surveyed added no value to their products through processing and packing. Vegetable session respondents are most likely to process and/or package products, however, 40% of them still receive less than 25% of gross sales from processing and packing.

Organic session respondents are least likely to add value to their products through processing and packing.

#### **Slide 11: Marketing of Agricultural Products Sold Directly to Consumers**

Thirty-five percent of session participants surveyed sell products directly to consumers through 100% Local Direct Markets. Note this is likely due to the higher number of organic session responses to this question than other producers, and organic producers are generally more likely to sell products through local/direct markets.

#### **Slide 12: Annual Sales Generated from Organic Production**

The majority of producers in this survey (62%) sell no organic products. Among the organic session respondents, only 35% sell all organic products and 43% of those in attendance currently sell no organic products. This group seems to be either interested in selling organically or in the conversion process. In Oregon, less than 0.5% of all farm acreage is Organic, (U.S. Census of Agriculture, 2007).

**Slide 13: Primary Organic Certification System Used**

The most widely used organic certification system used by the producers surveyed is Oregon Tilth, followed by the “other” category.

**Slide 14: #1 Barrier to Producing or Expanding Current Markets**

The number one barrier for farmers looking to produce or expand their current market is financing. This is reflected by vegetable and organic session respondents. Berry session respondents, however, primarily express labor as their highest barrier to producing or expanding current markets.

**Slide 15: #2 Barrier to Producing or Expanding Current Markets**

The number two barrier to producing or expanding current products is natural resources. However, only a marginal number of farmers expressed this concern over others such as labor, financing, and market size or access.

**Slide 16: #3 Barrier to Producing or Expanding Current Markets**

The #3 barrier to producing or expanding current production was regulatory issues. Note, however, that vegetable session respondents may have thrown off the accuracy of this issue in that a higher number of vegetable producers responded in comparison to organic and berry session respondents.

It may be fair to point out that after financing, farmers face a number of barriers to expanding current production, which may hold equal weight in limiting production and expansion.

**Slide 17: #1 Natural Resource Barrier**

There was no clear distinction between limited land, water limitations, and land quality as natural resource barriers of most concern.

**Slide 18: #1 Labor Barrier**

Clearly, the cost of labor is the number one labor barrier with all producer groups ranking it of high importance. Among vegetable session respondents, finding workers with the desired skills and training is also a barrier of concern.

**Slide 19: #1 Financial Barrier**

Access to capital is the number one financial barrier among most producer groups. Fifty-two percent of organic session respondents expressed “other” as a financial barrier. It is not clear what other financial barriers organic producers are concerned with.

**Slide 20: #1 Market-Related Barrier**

Market size and market channel access were of most concern to producers. Among berry session respondents, 23% of them also expressed concern with quantity requirements.

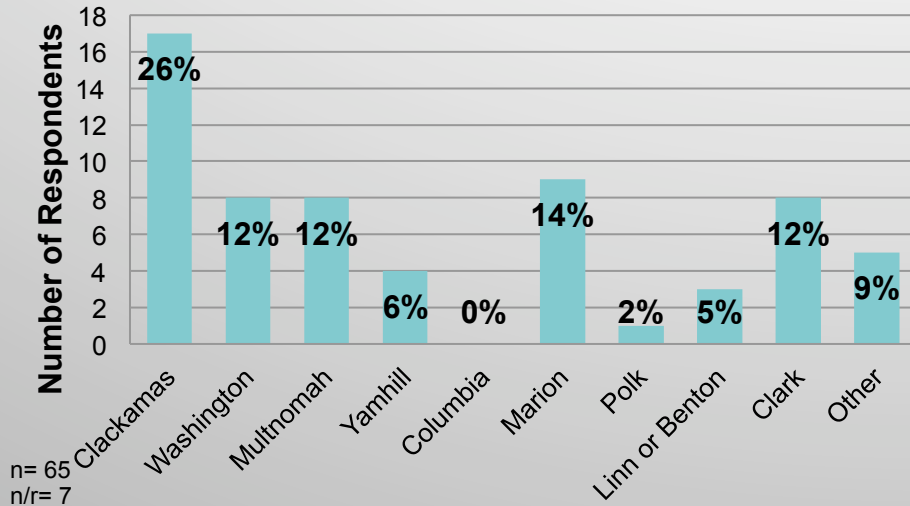
**Slide 21: #1 Regulatory Barrier**

There were no distinct regulatory barriers of concern. Labor laws and environmental regulations were of most concern to participants in the vegetable session, while certification programs were an issue for organic and berry session respondents. Market rules and regulations and other regulatory barriers were also an issue for those in the berry session.

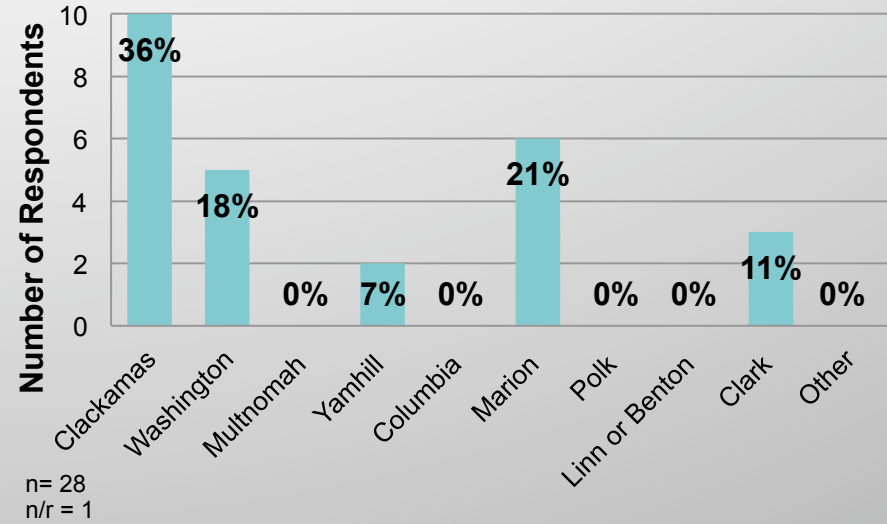
Note: The last six figures can be used as reference material. They include data on Oregon farms taken from the 2007 U.S. Census of Agriculture.

# County of Residence

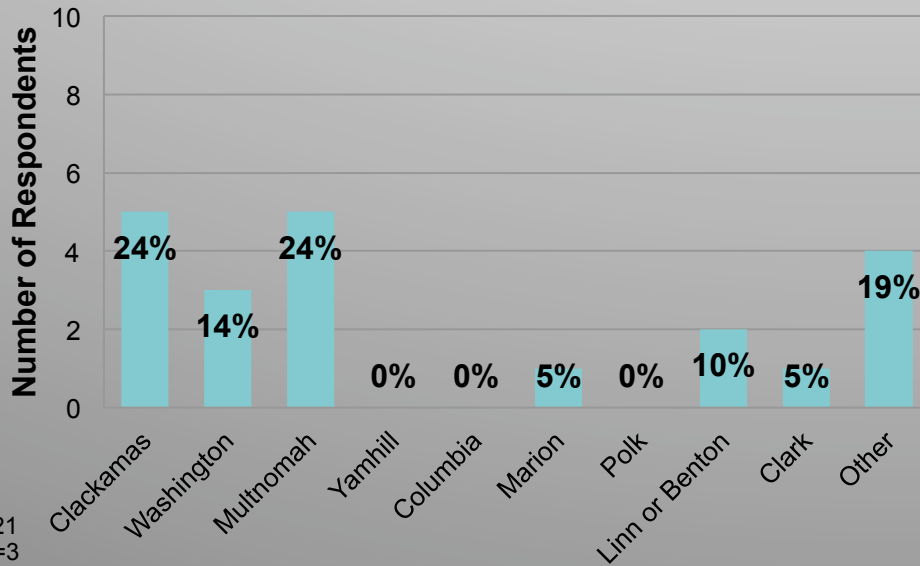
## All Sessions



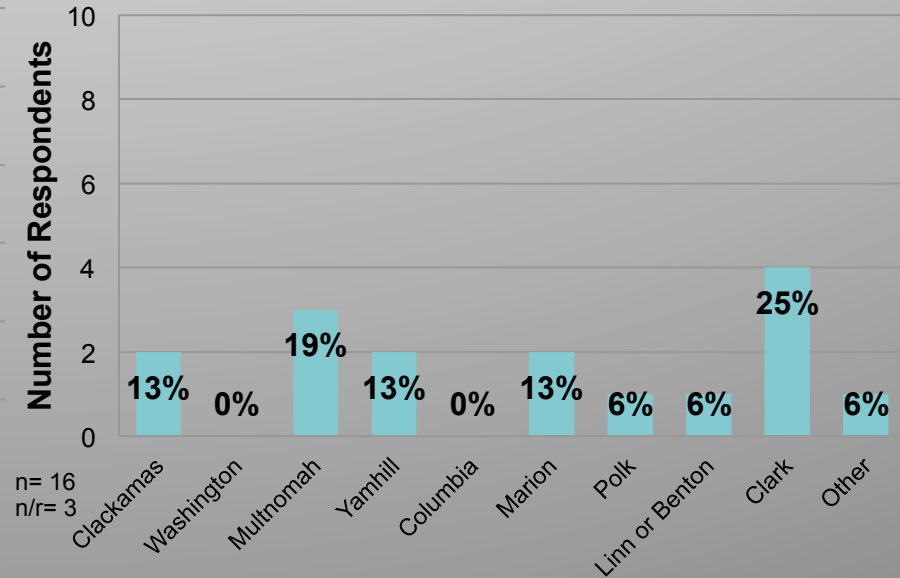
## Vegetable Session



## Organic Session

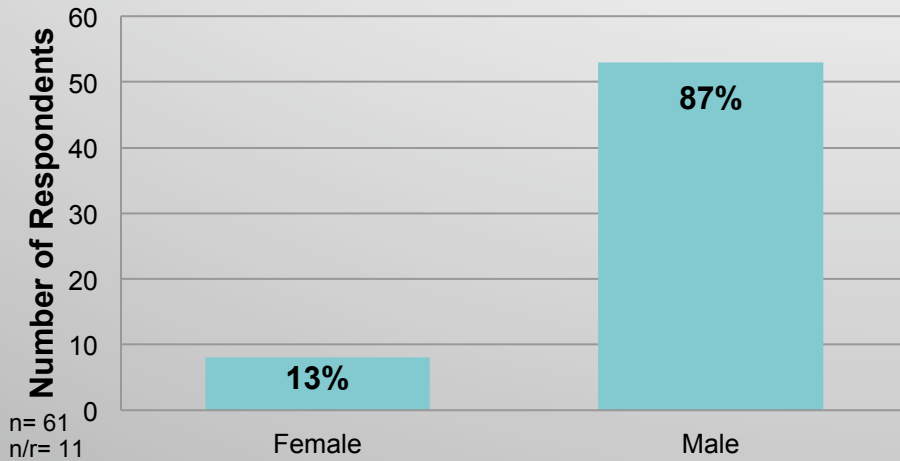


## Berry Session

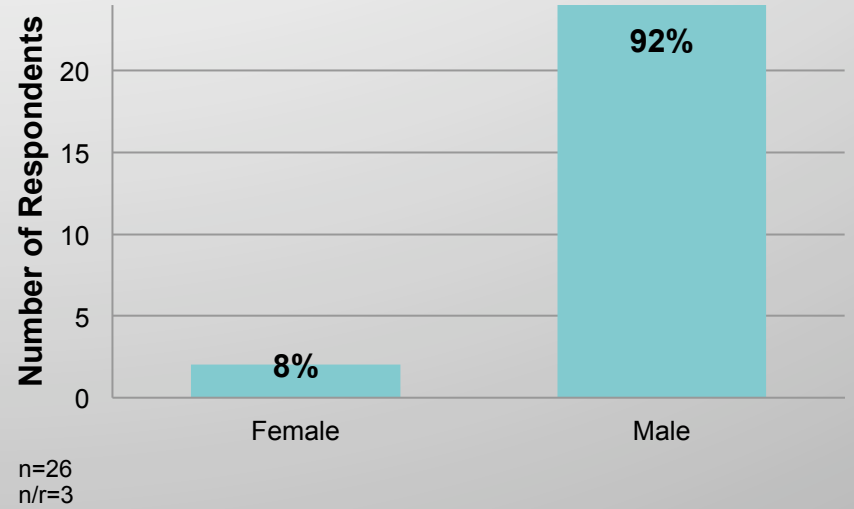


# Principle Farm Operator Gender

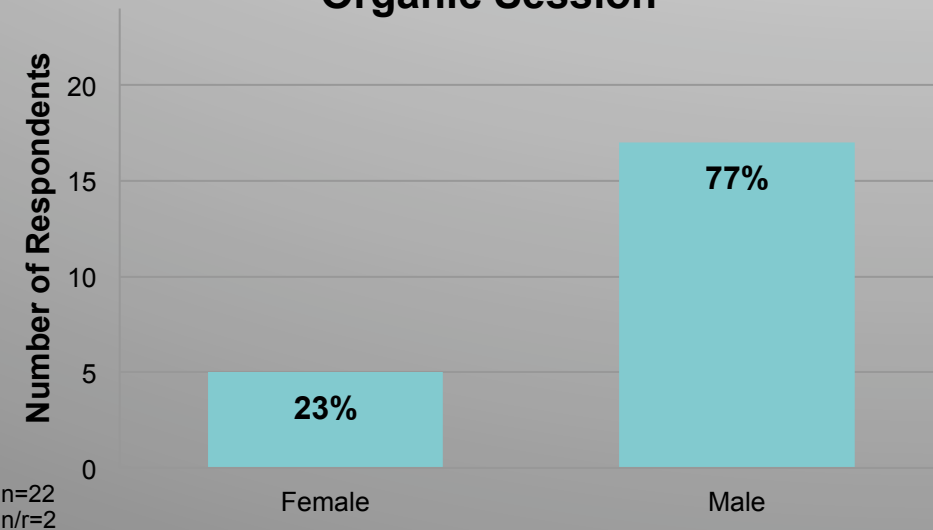
## All Sessions



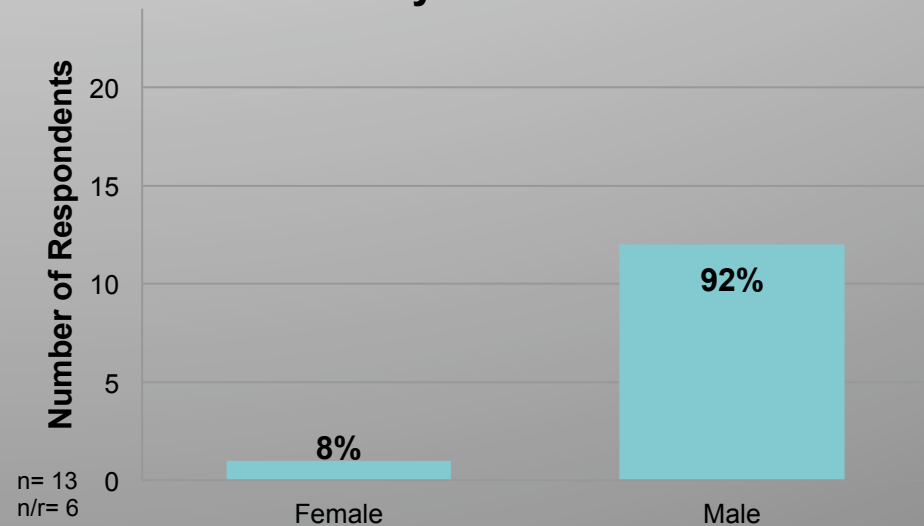
## Vegetable Session



## Organic Session

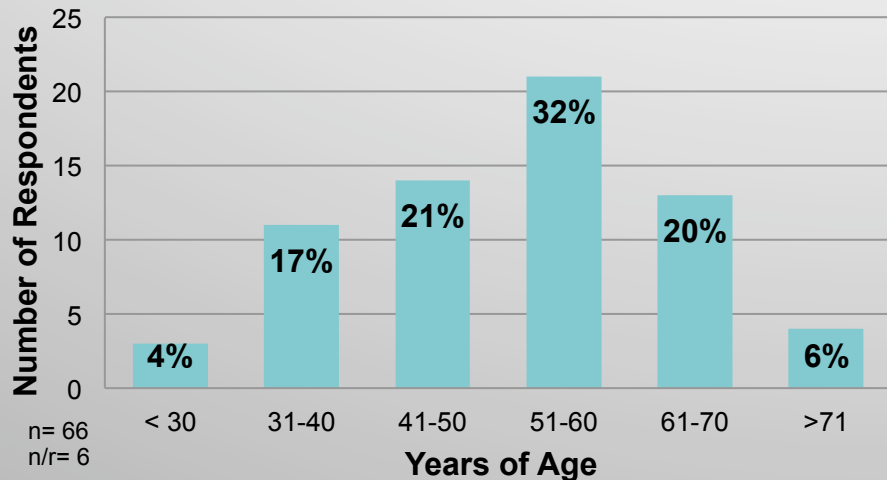


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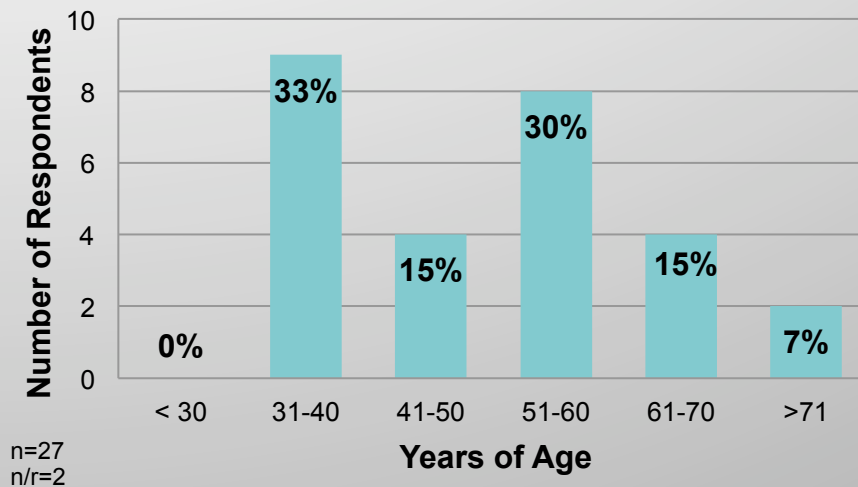


# Principle Farm Operator Age

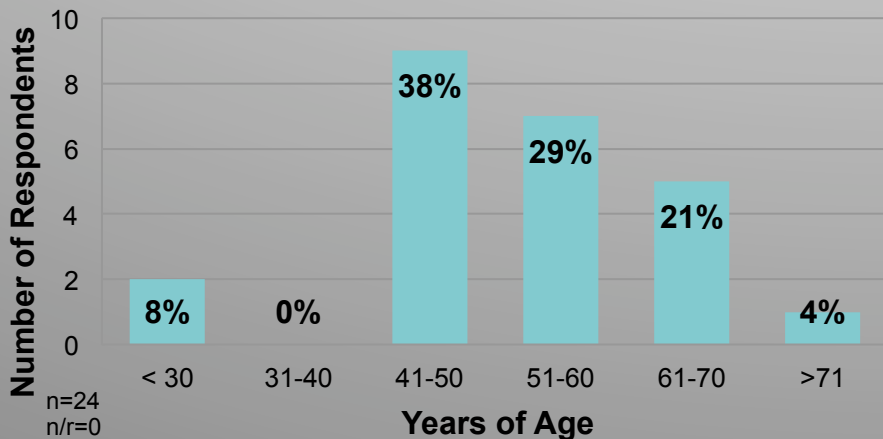
## All Sessions



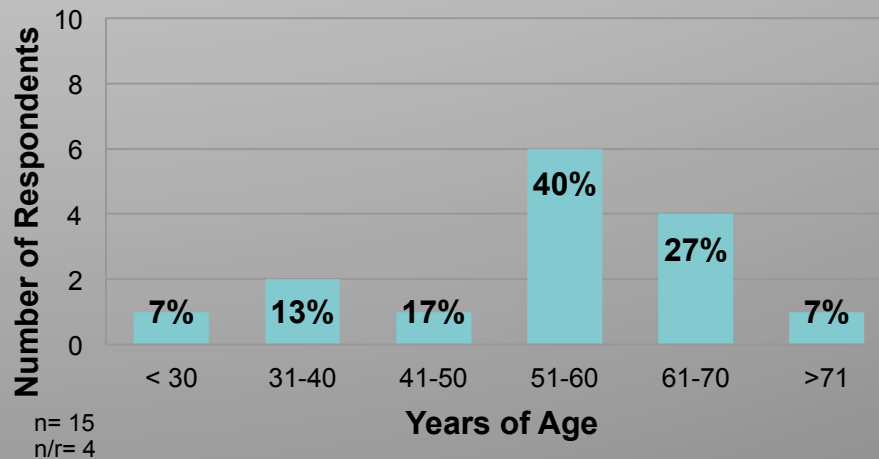
## Vegetable Session



## Organic Session

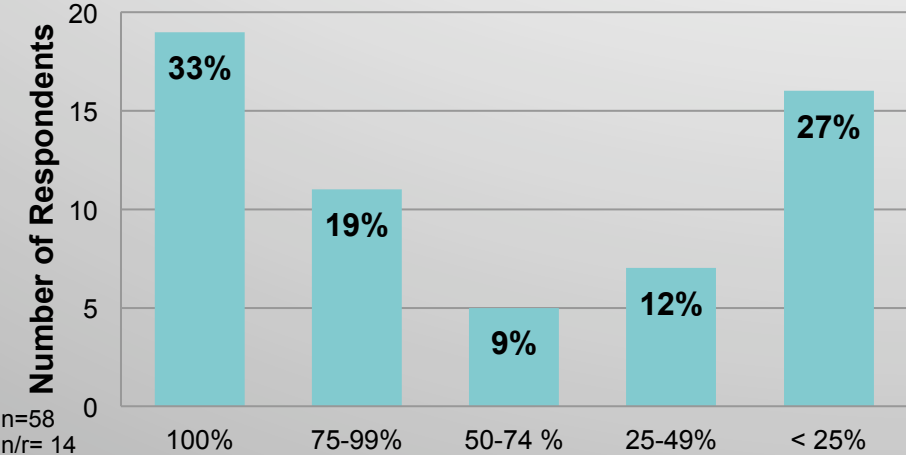


## Berry Session

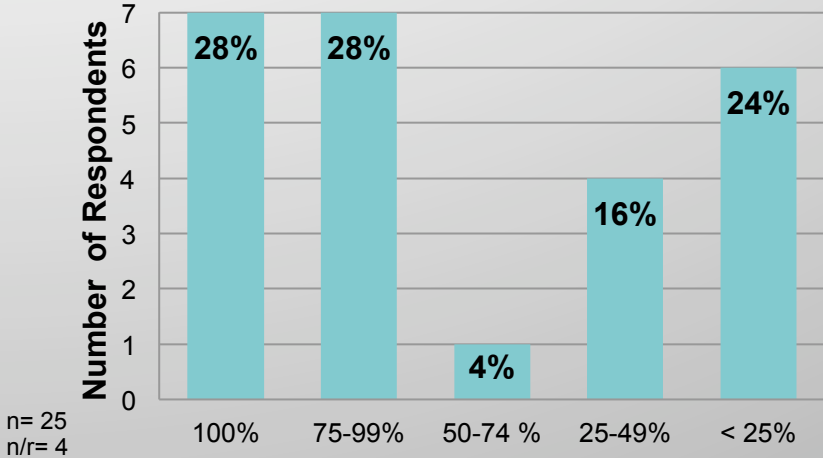


# Percent of Principle Operator's Total Household Income that Comes from the Farming Operation

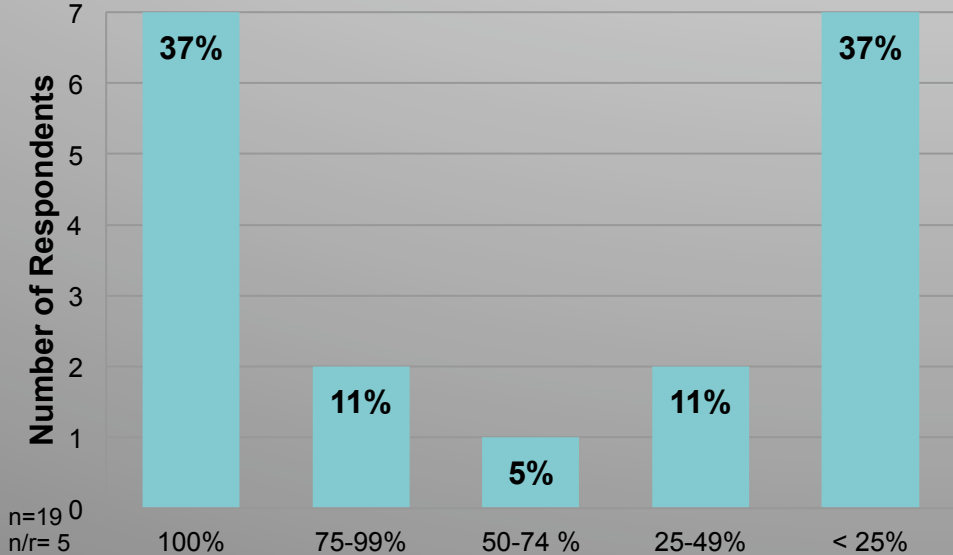
**All Sessions**



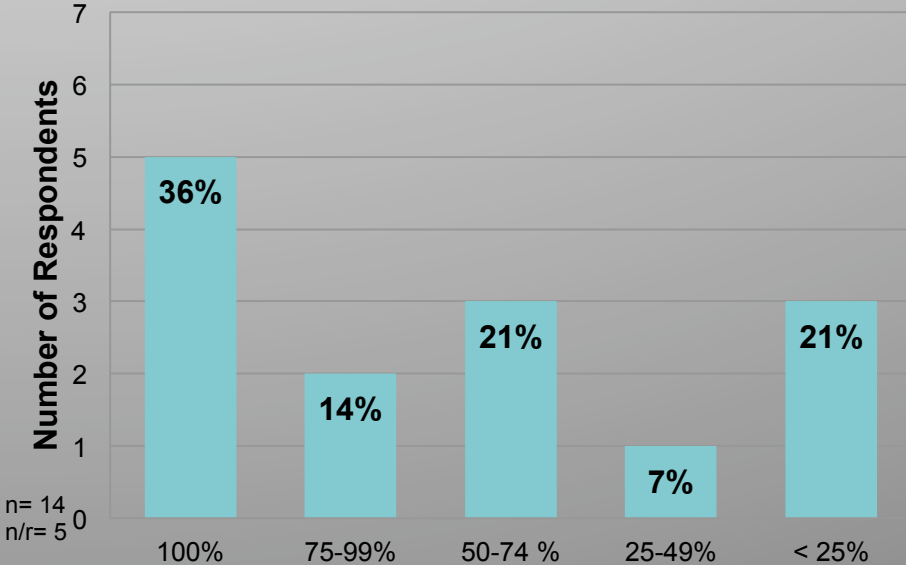
**Vegetable Session**



**Organic Session**



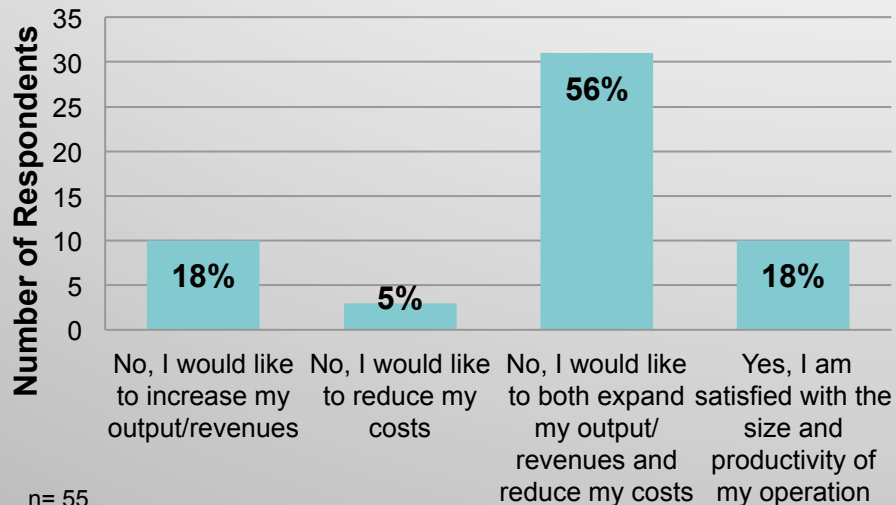
**Berry Session**





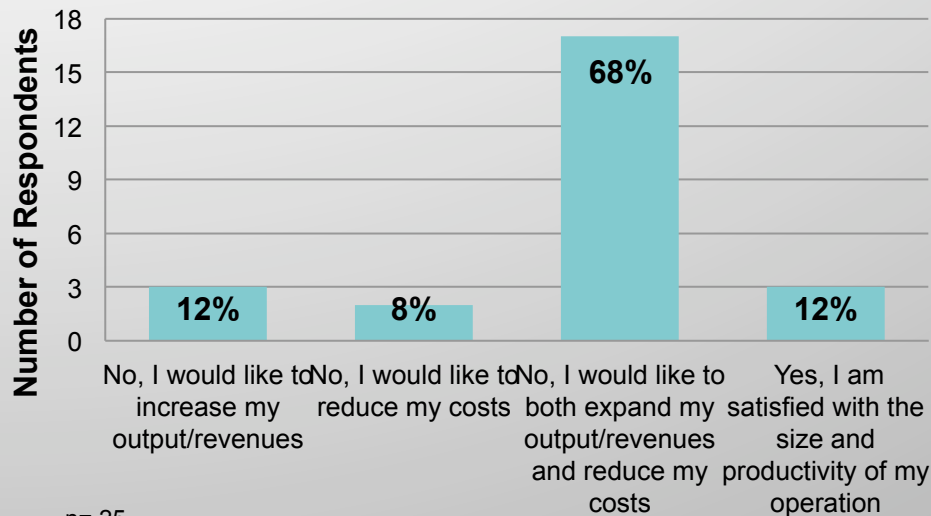
# Satisfaction with the Size & Productivity of Operation

## All Sessions



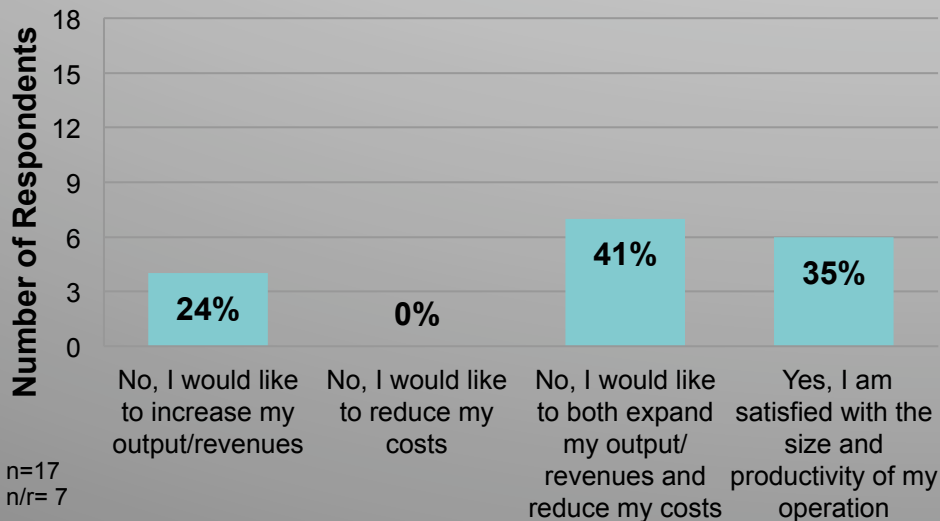
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## Vegetable Session



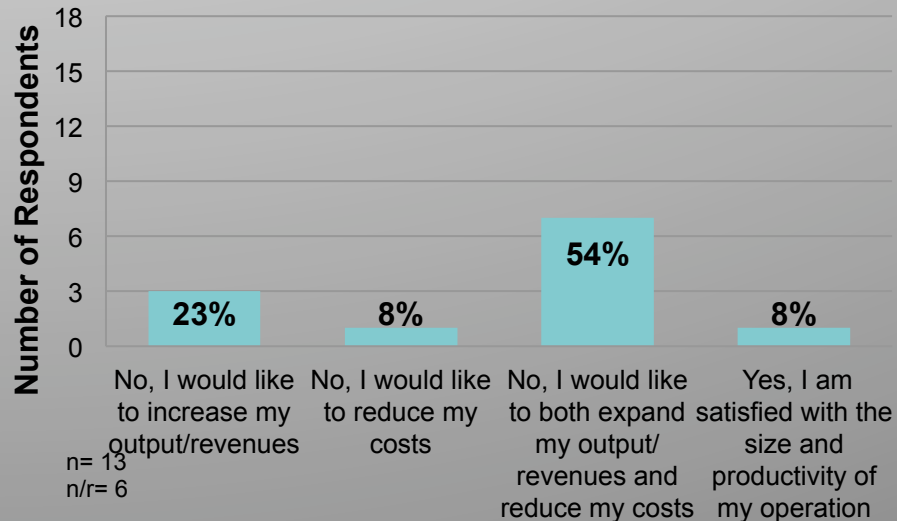
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## Organic Session



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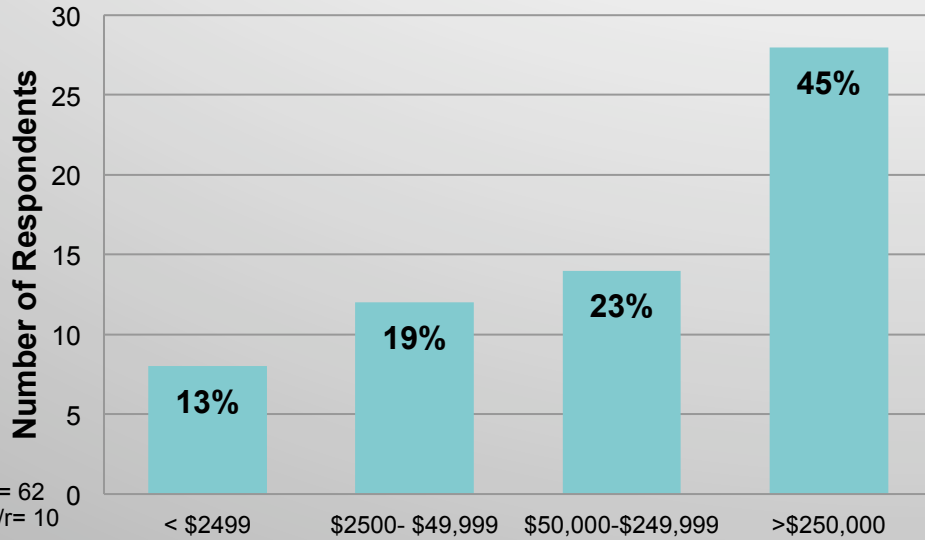
## Berry Session



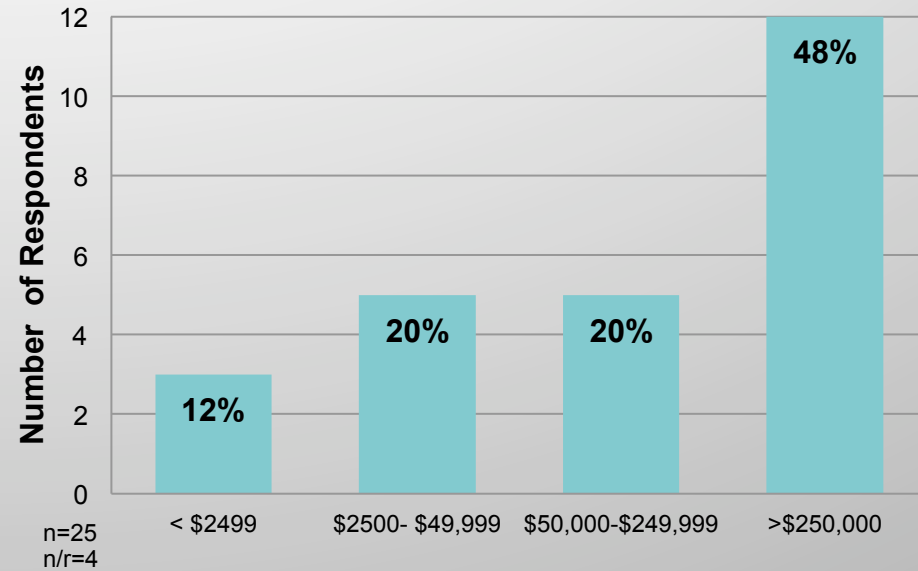
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# 2009 Gross Farm Sales

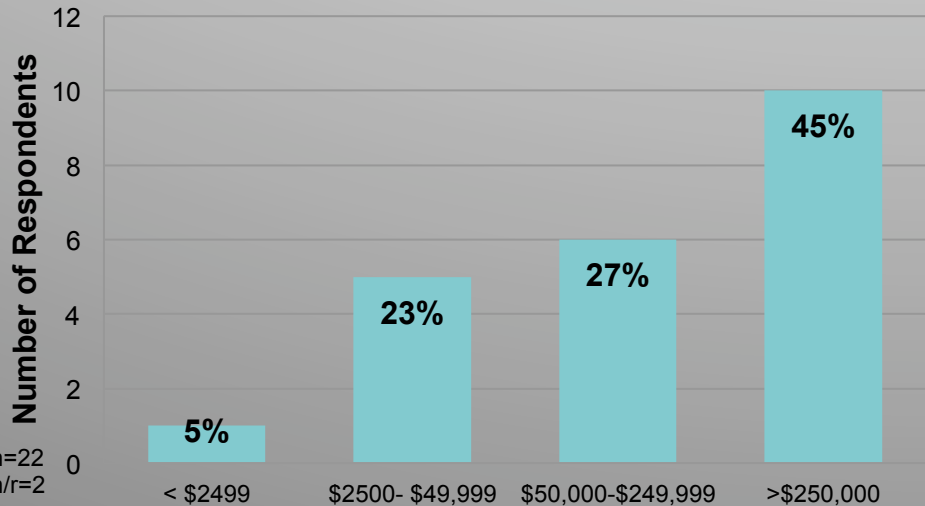
## All Sessions



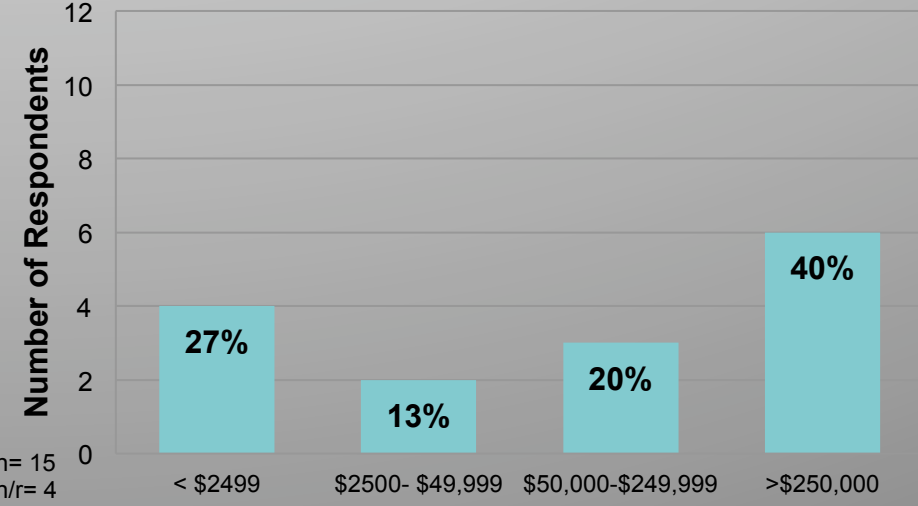
## Vegetable Session



## Organic Session

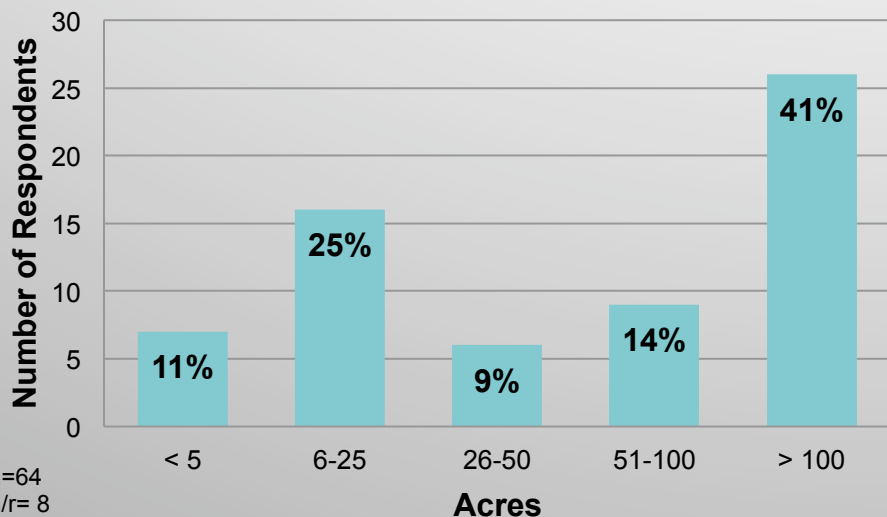


## Berry Session

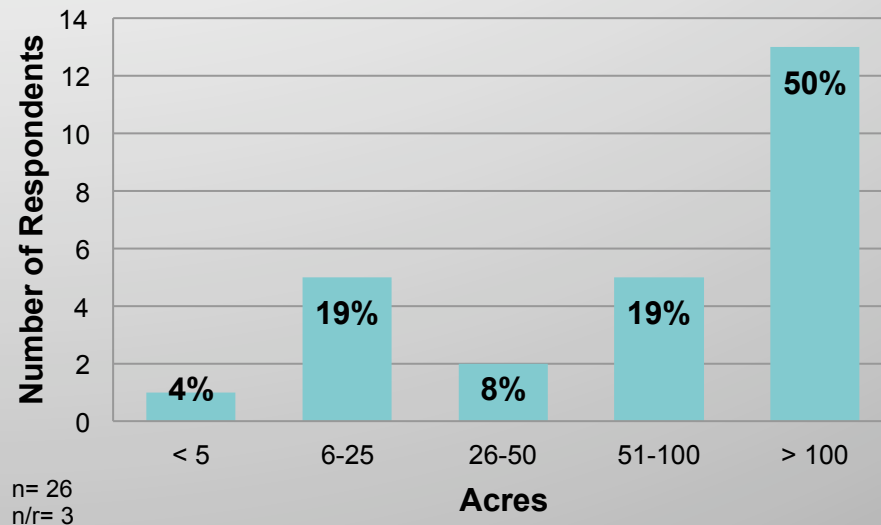


# Total Acres Contributing to Generating Gross Farm Sales

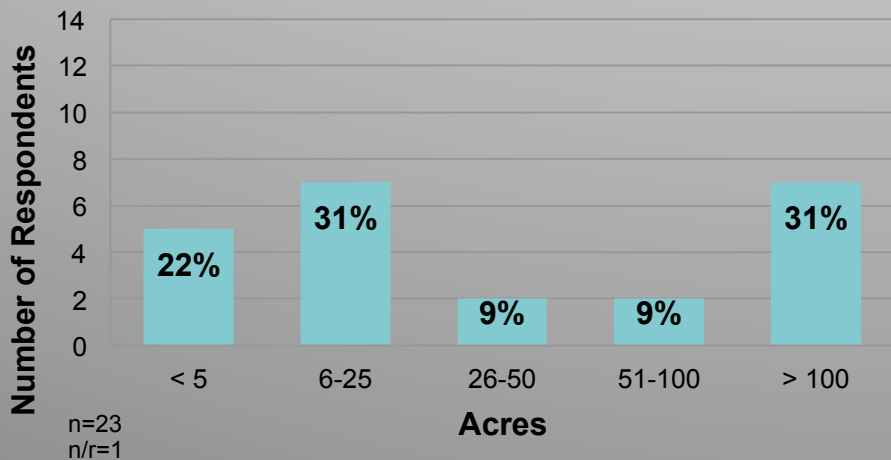
## All Sessions



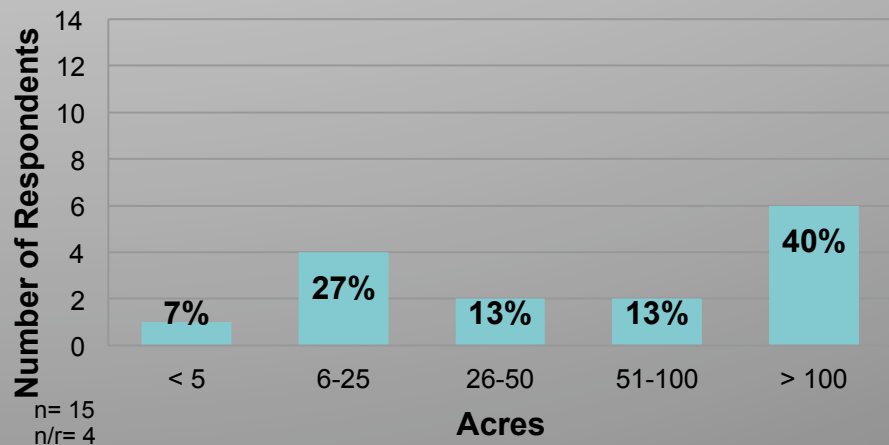
## Vegetable Session



## Organic Session

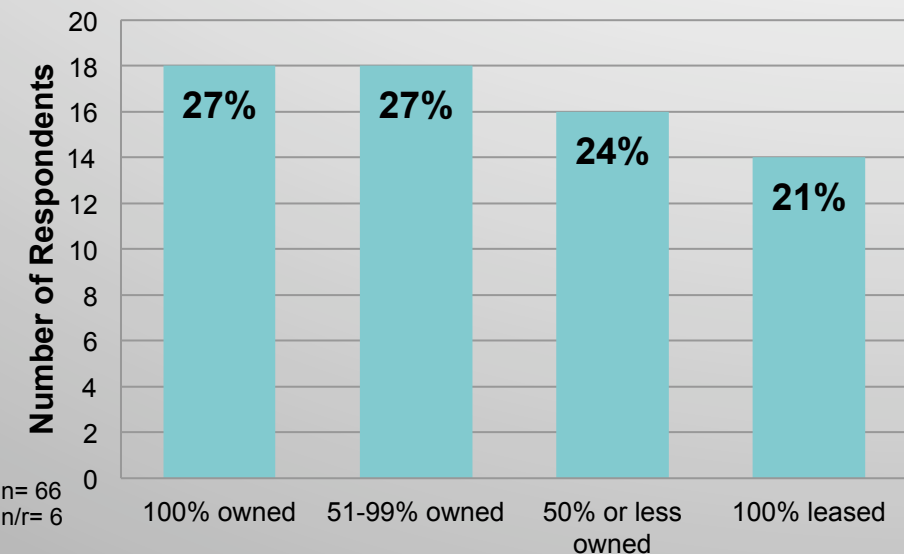


## Berry Session

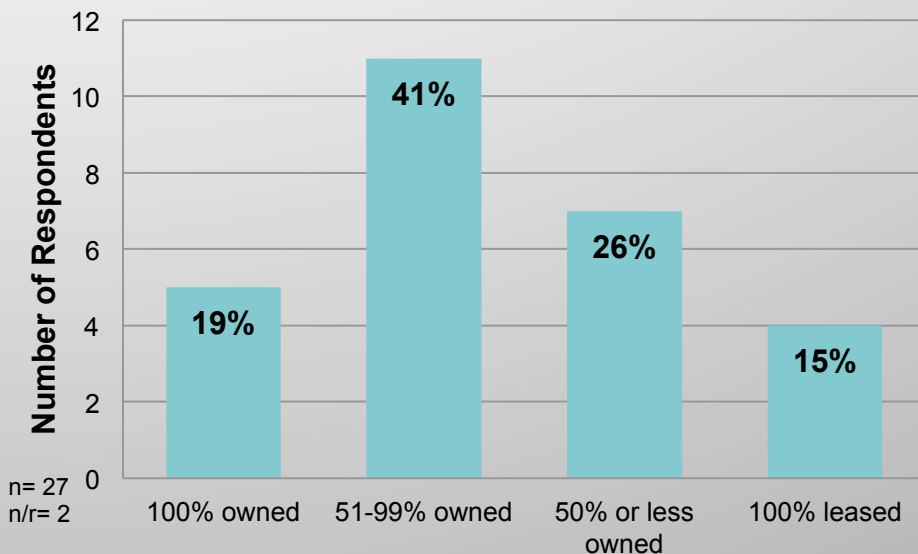


# Percentage of Owned vs. Leased Land Contributing to Gross Sales

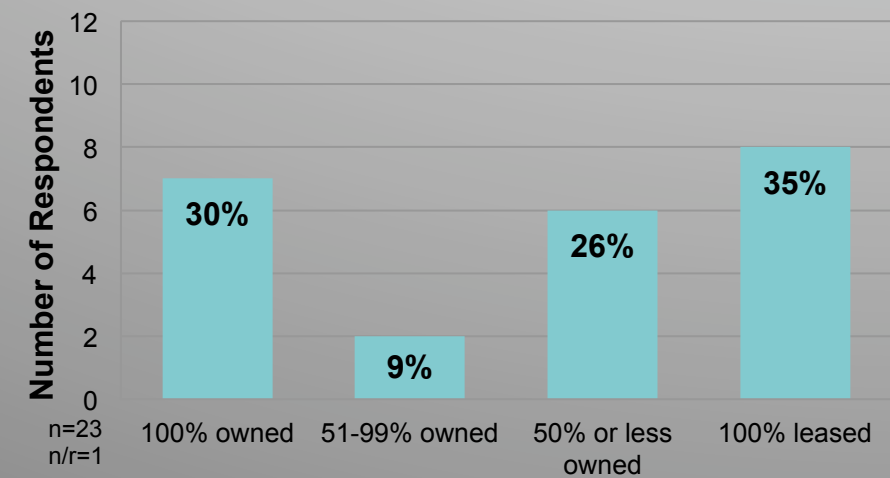
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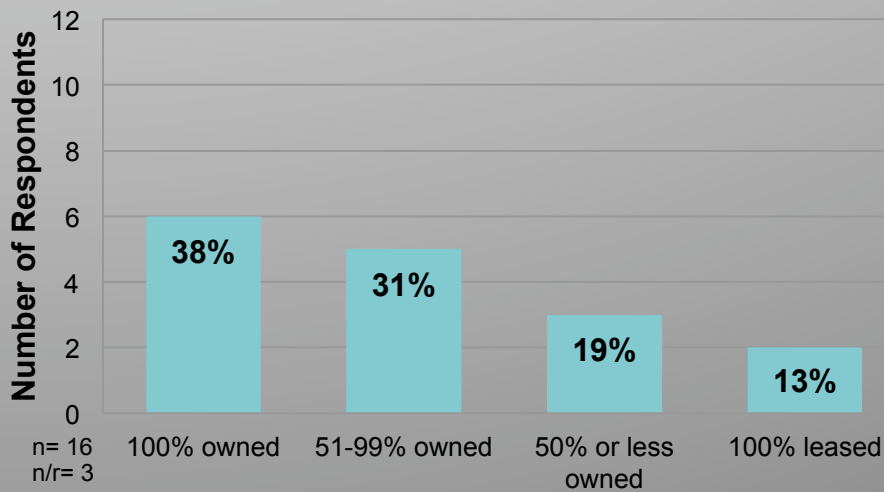
## Vegetable Session



## Organic Session

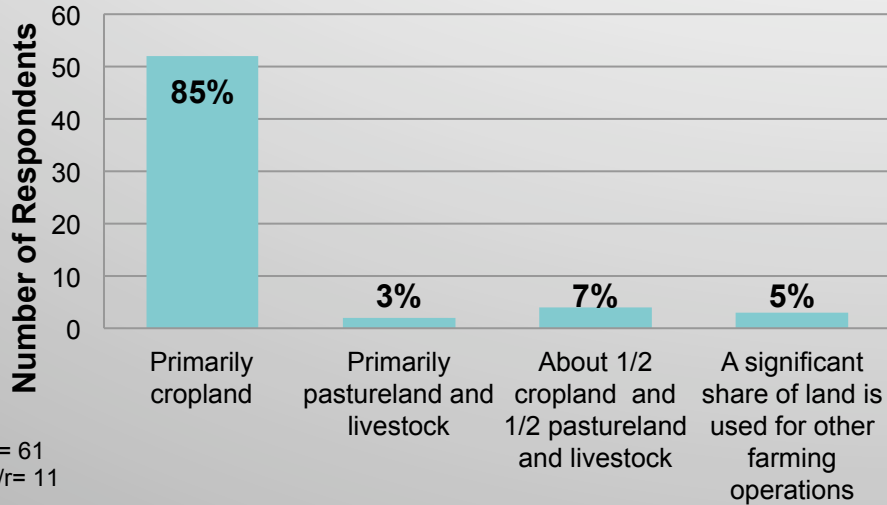


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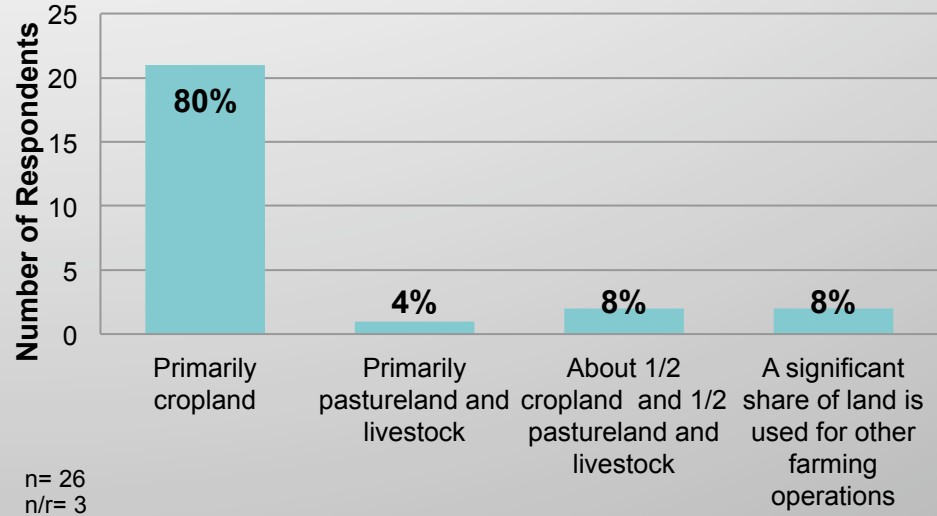


# Farm Operation Acreage Uses

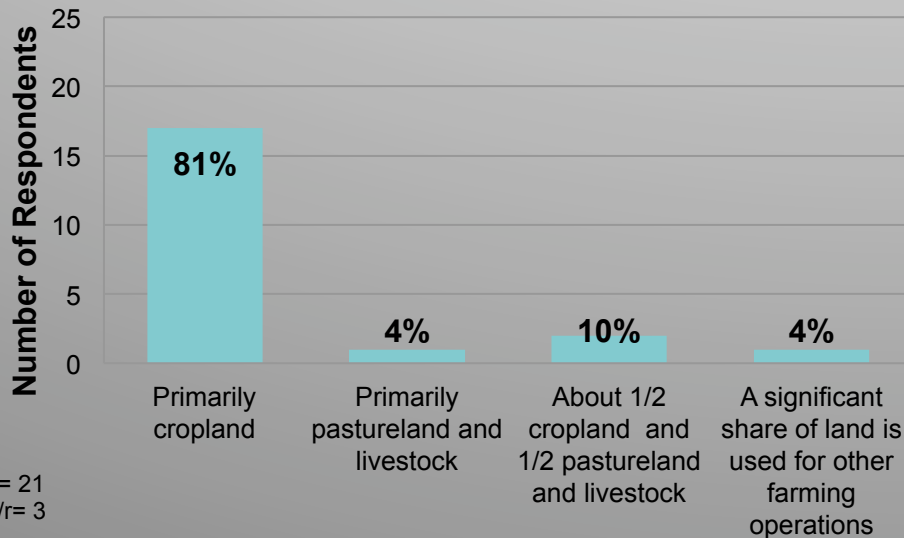
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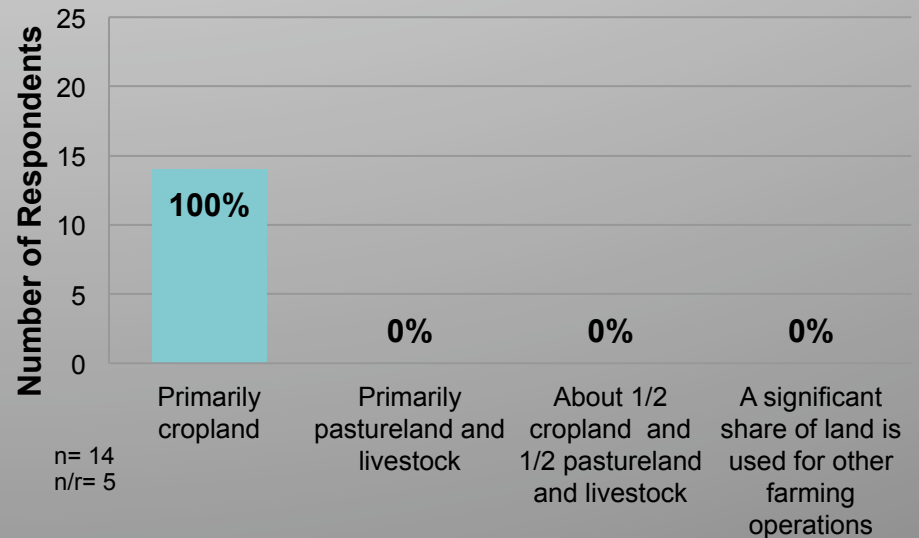
## Vegetable Session



## Organic Session

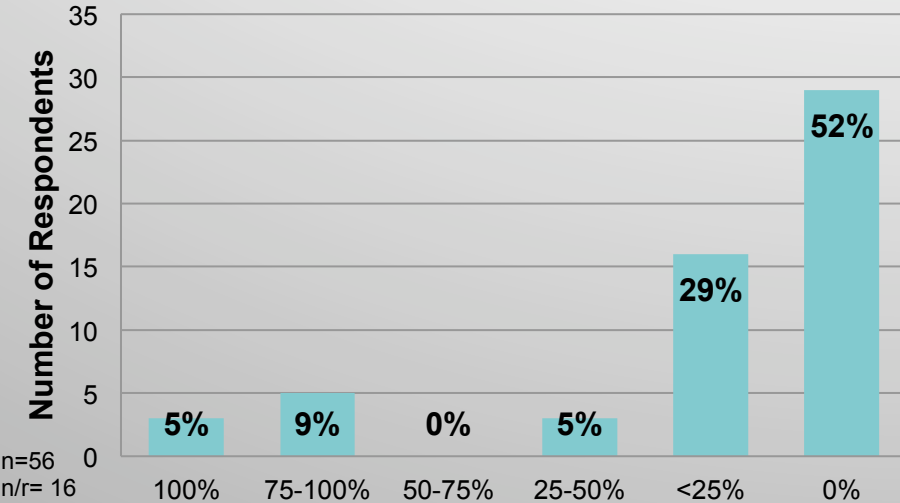


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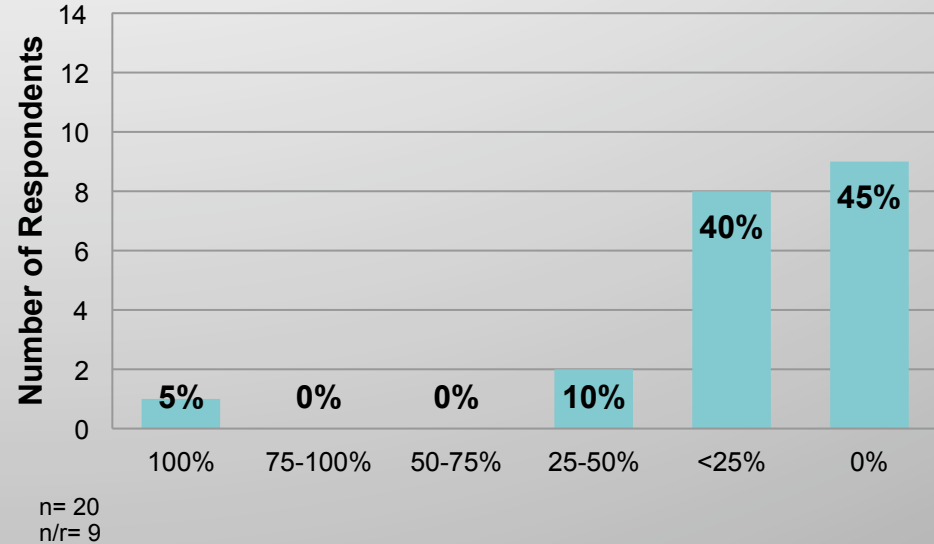


# Percentage of Gross Farm Sales from Processing/ Packing of Products

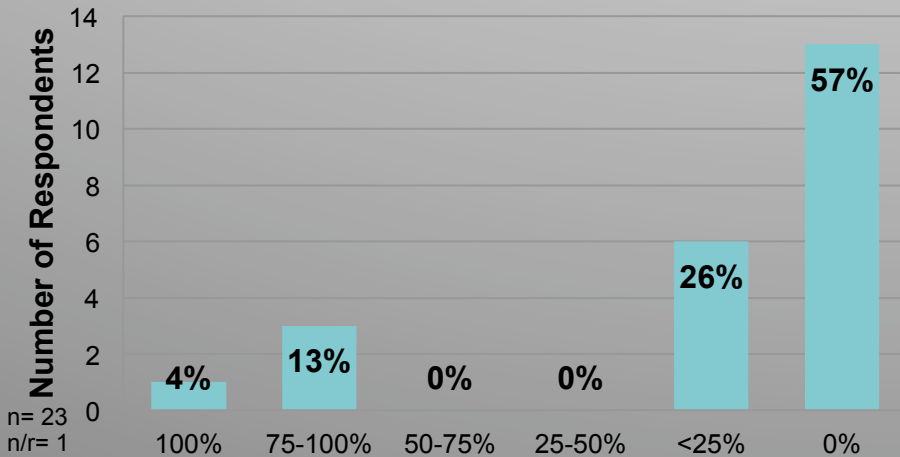
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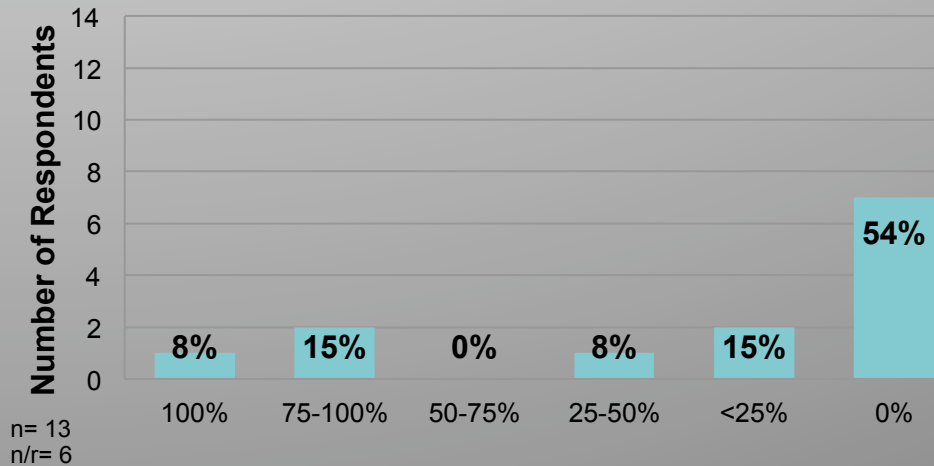
## Vegetable Session



## Organic Session

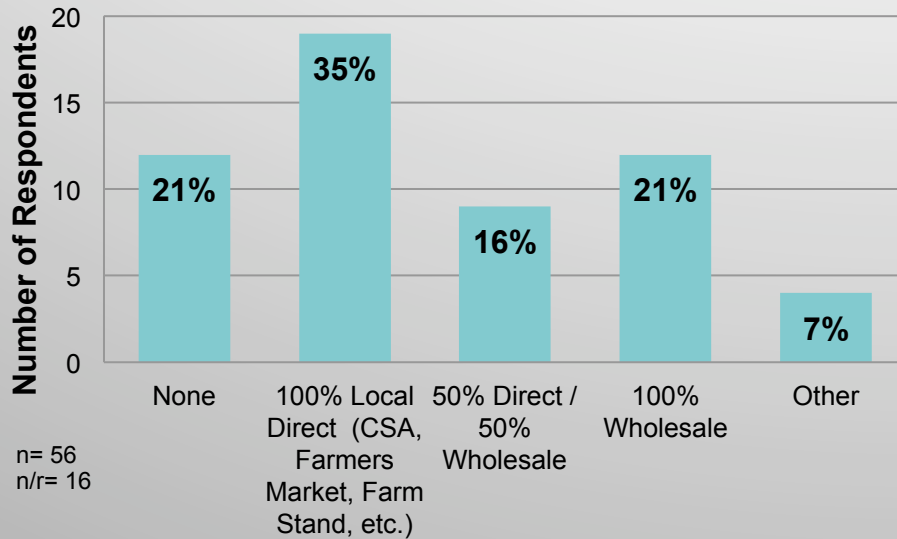


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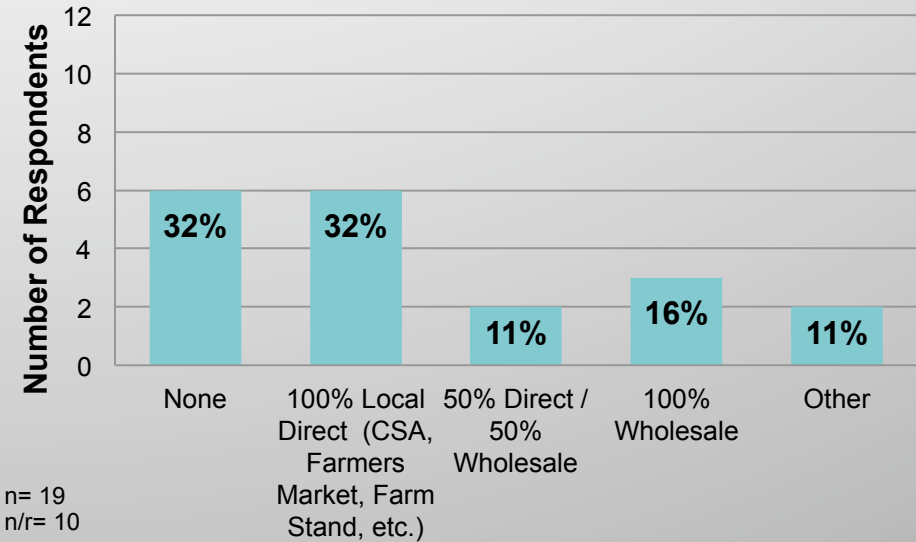


# Marketing of Agricultural Products Sold Directly to Consumers

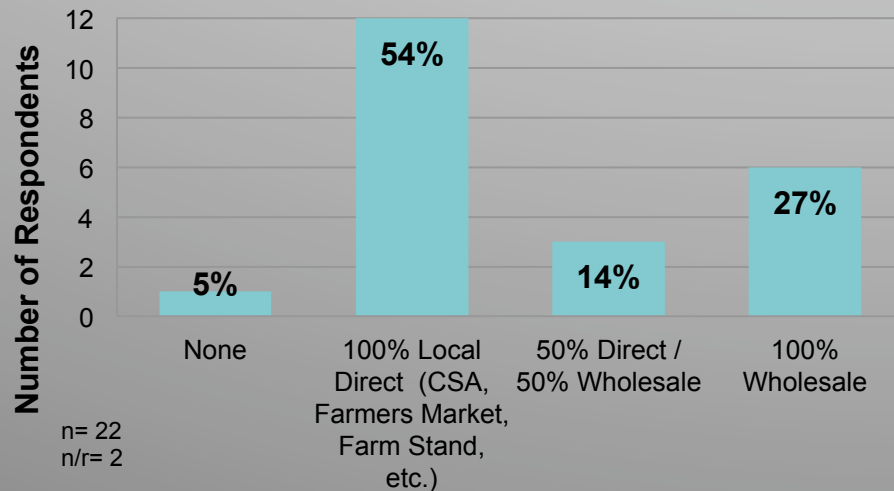
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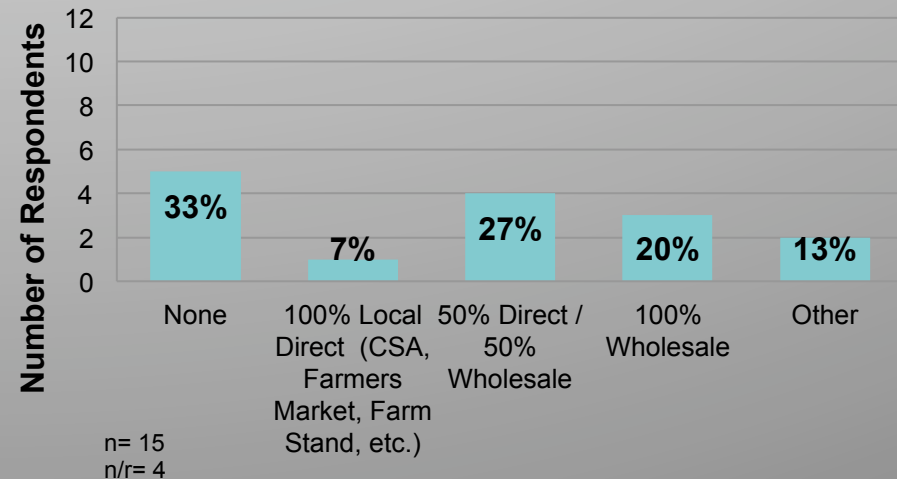
## Vegetable Session



## Organic Session

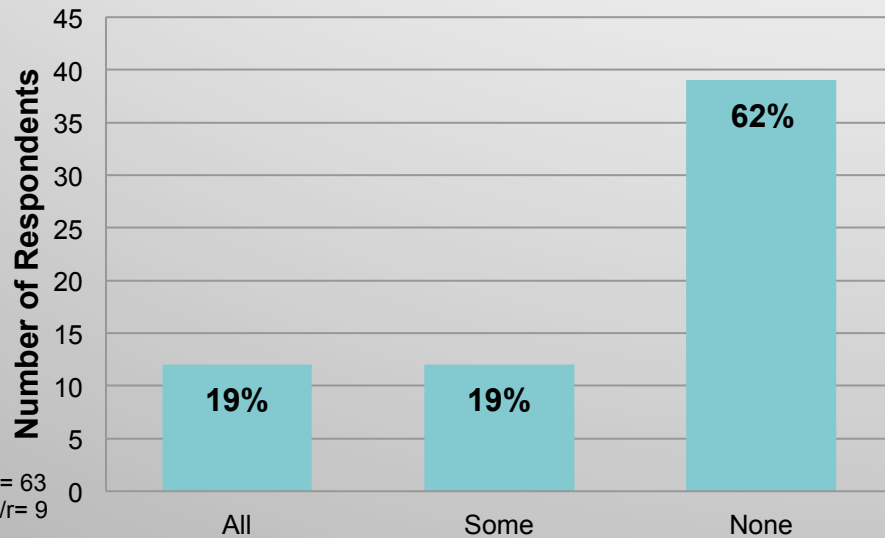


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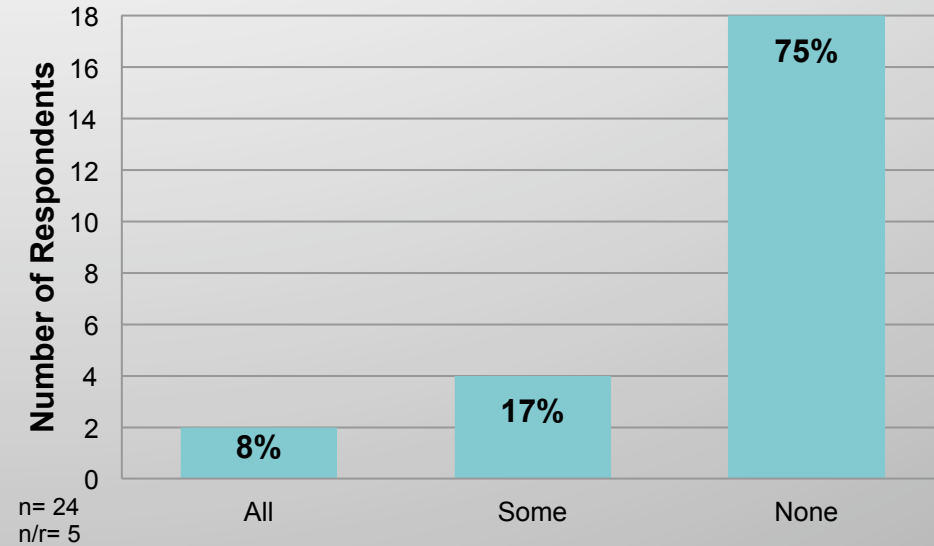


# Annual Sales Generated from Organic Production

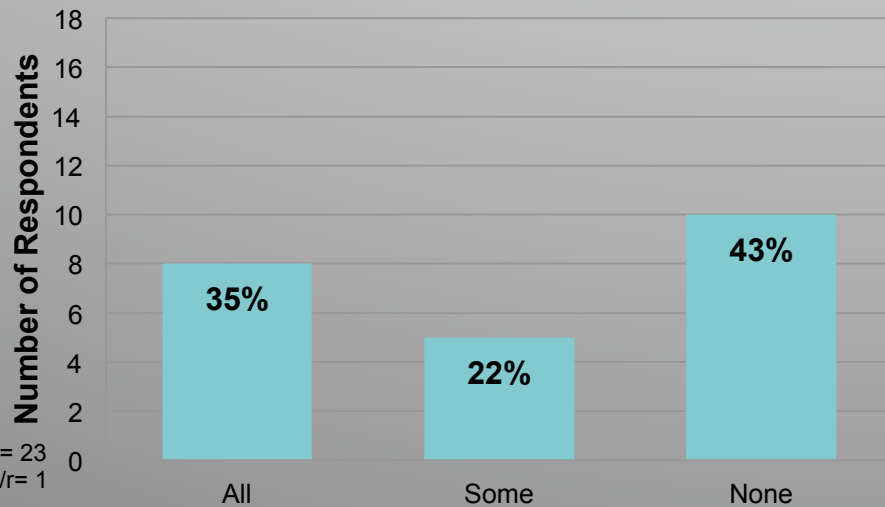
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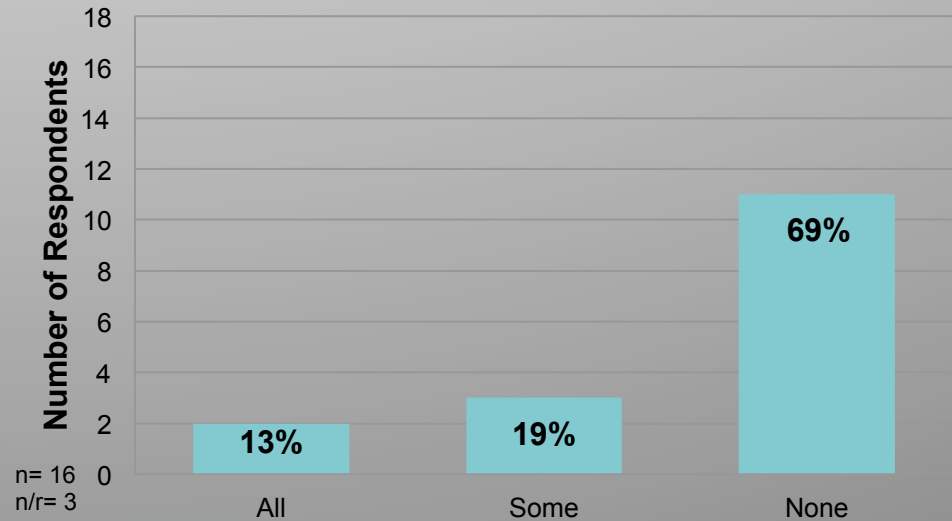
## Vegetable Session



## Organic Session



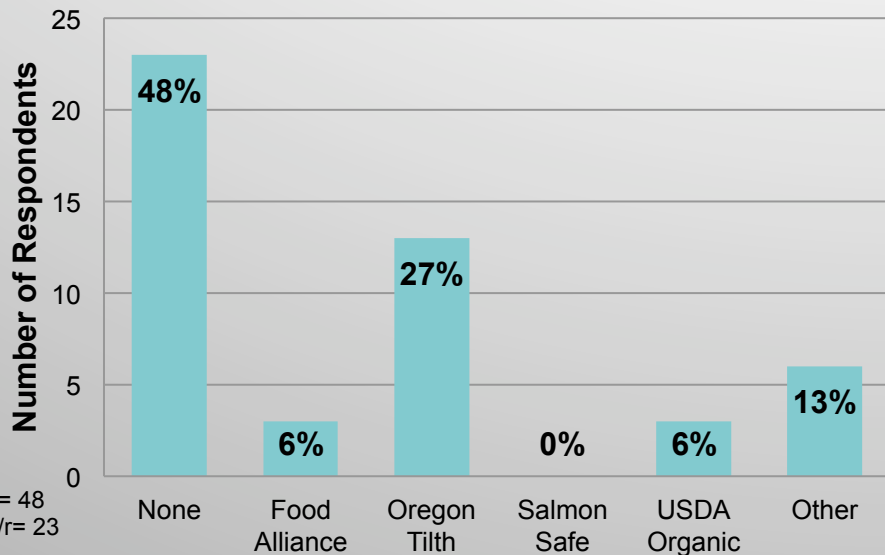
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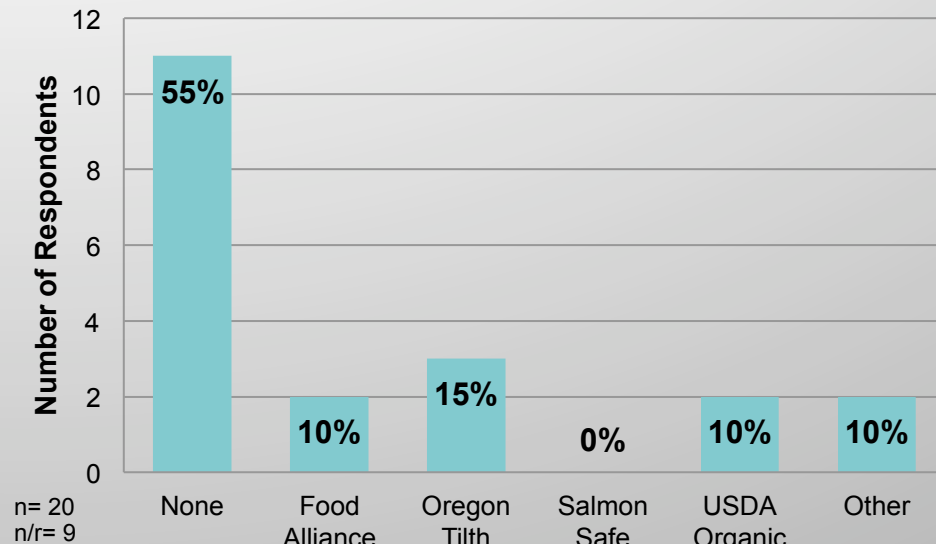


# Primary Organic Certification System Used

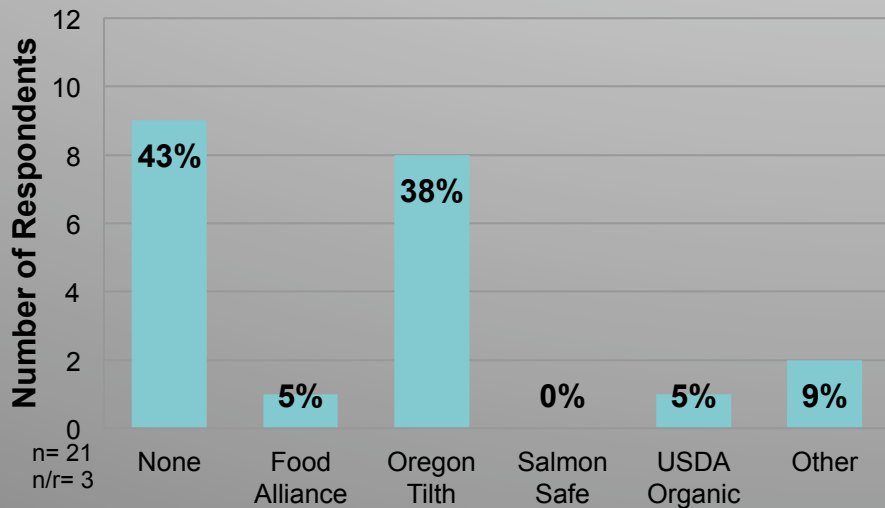
## All Sessions



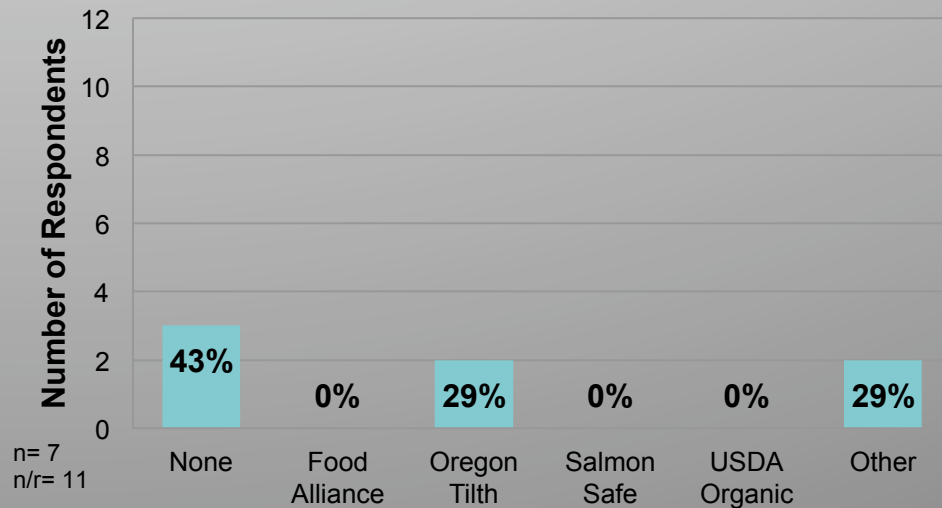
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## Organic Session

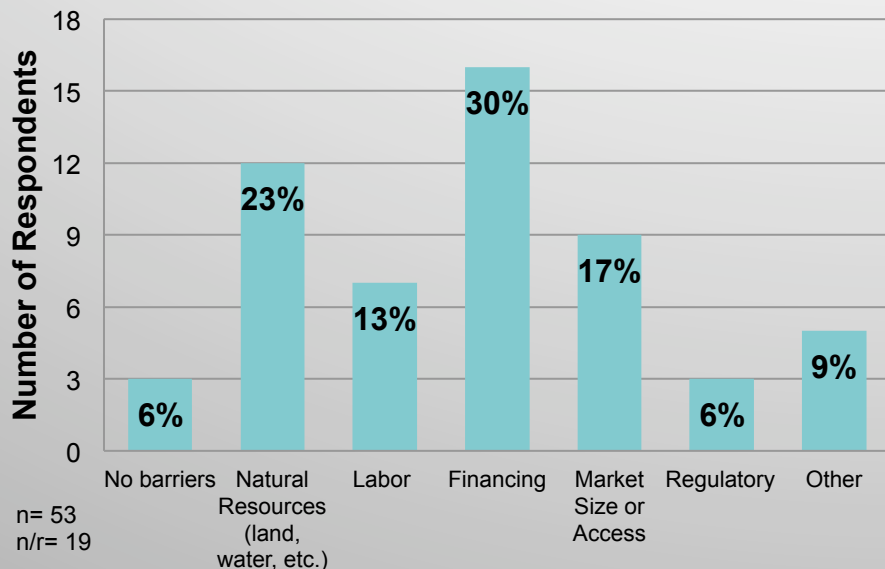


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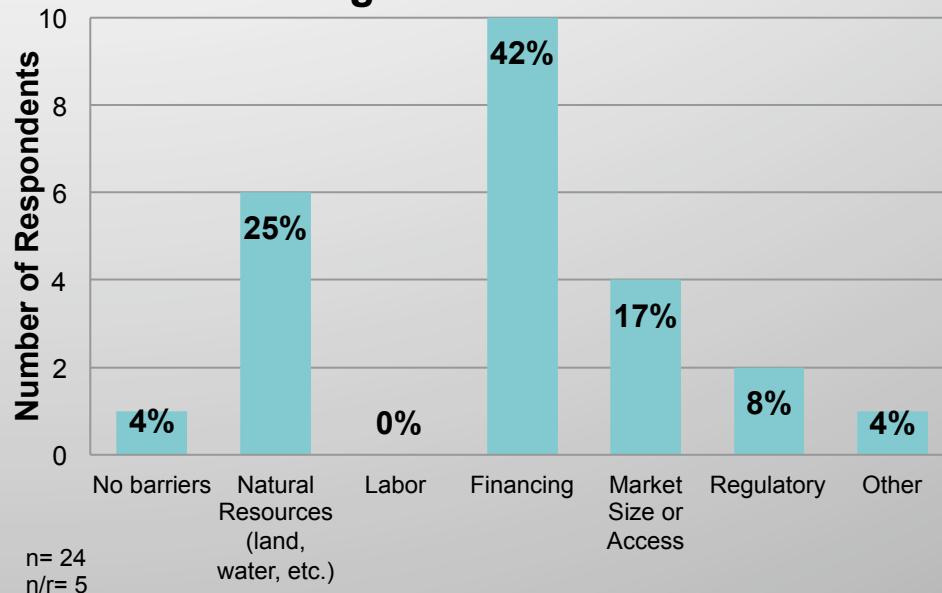


# #1 Barrier to Producing or Expanding Current Markets

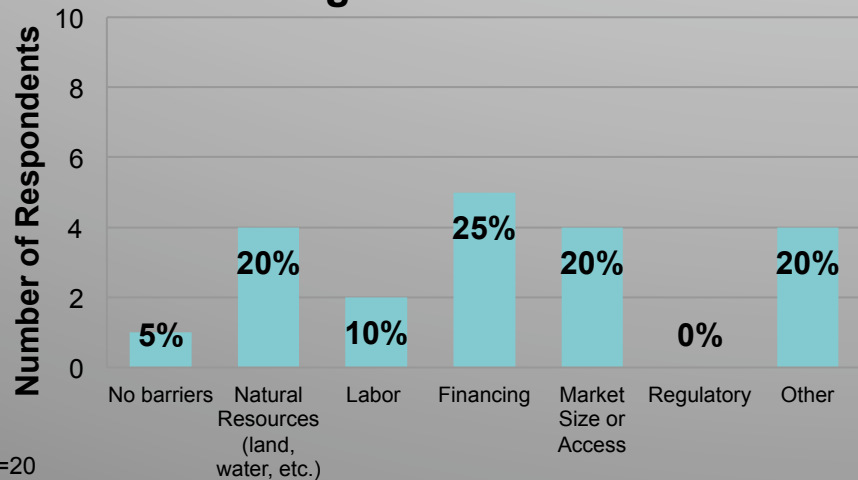
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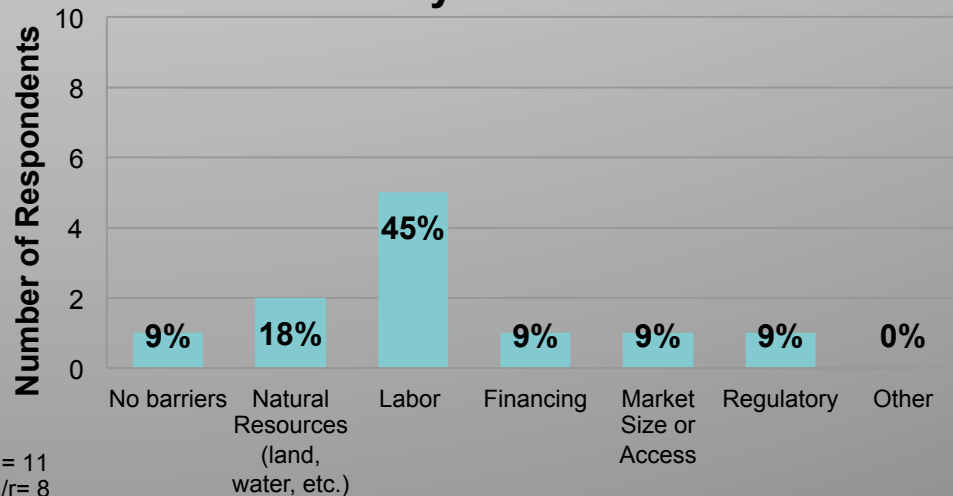
## Vegetable Session



## Organic Session

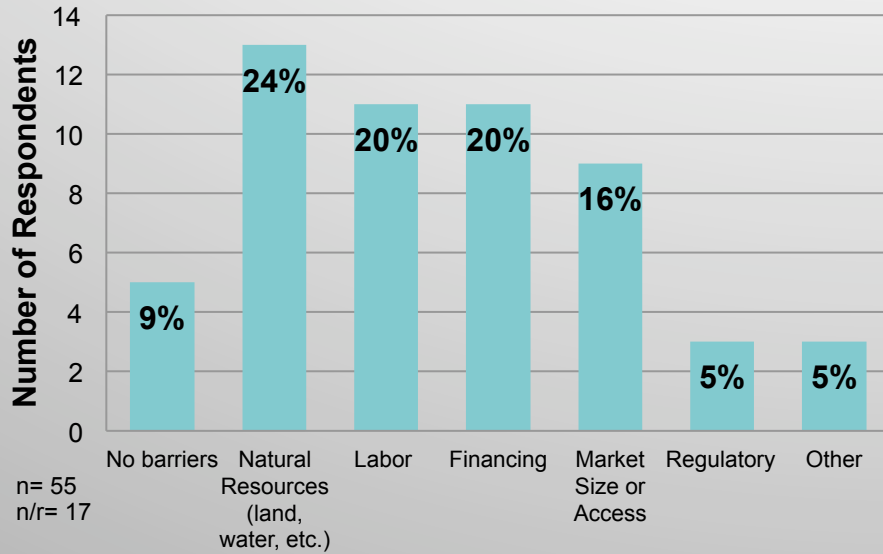


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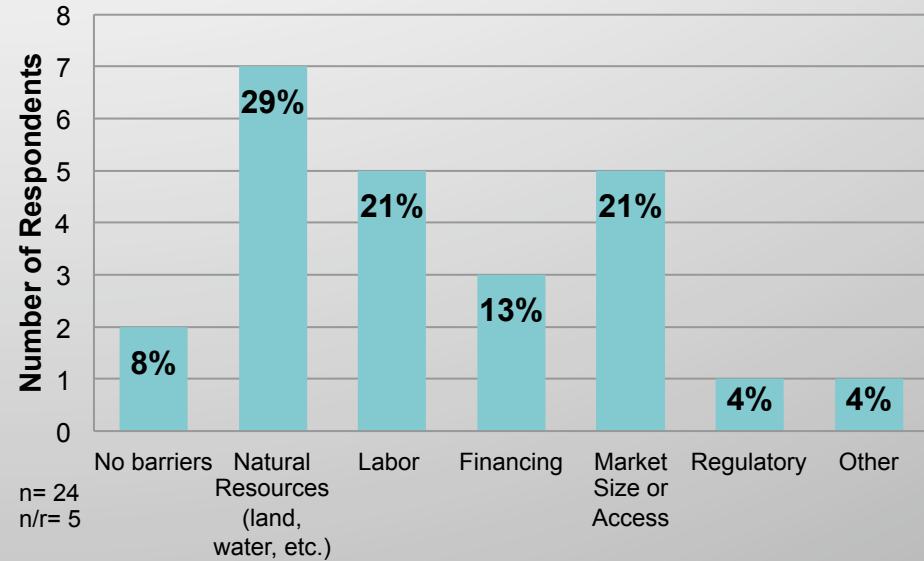


# #2 Barrier to Producing or Expanding Current Products

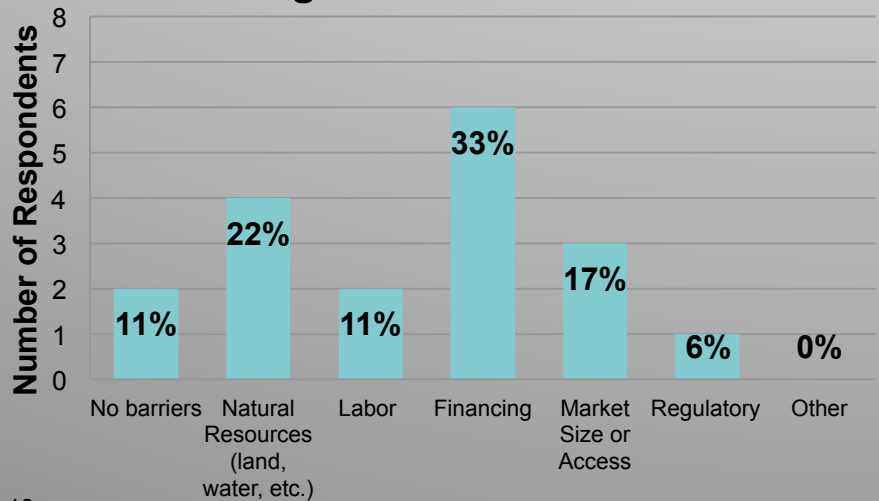
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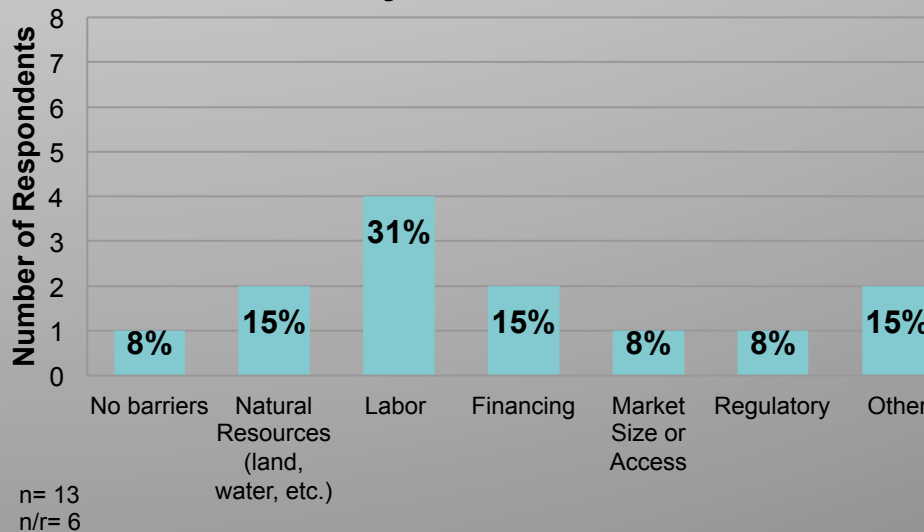
## Vegetable Session



## Organic Session

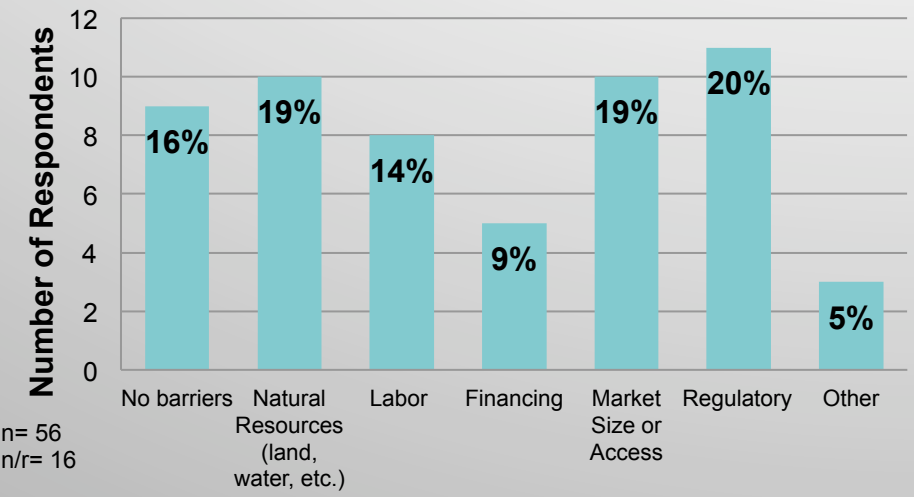


## Berry Session

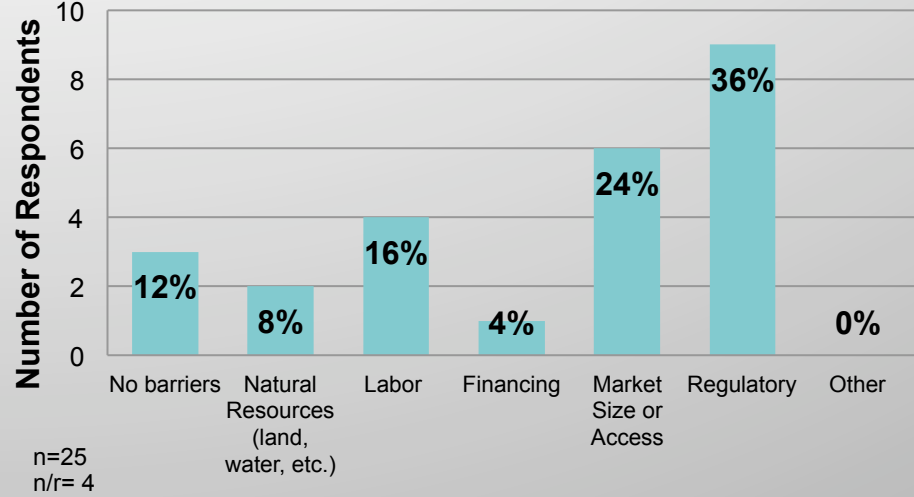


# #3 Barrier to Producing or Expanding Current Production

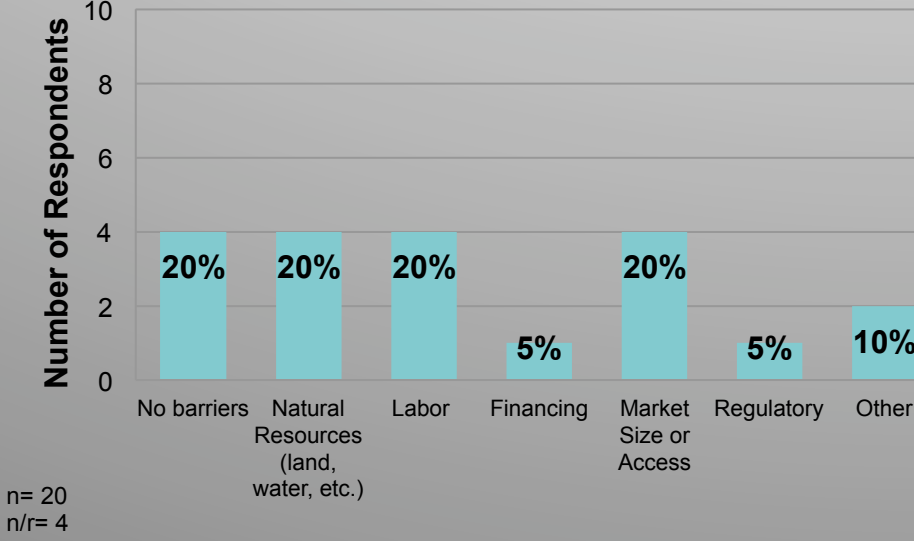
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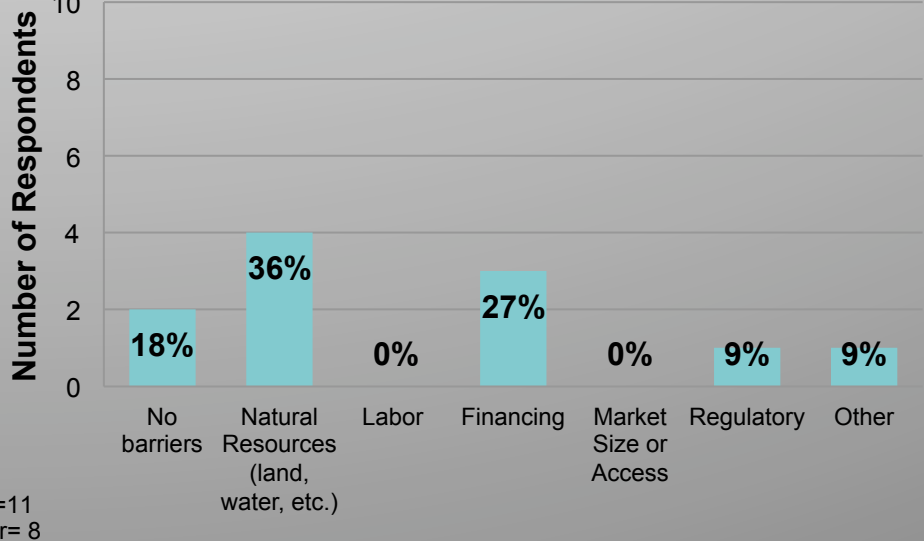
## Vegetable Session



## Organic Session

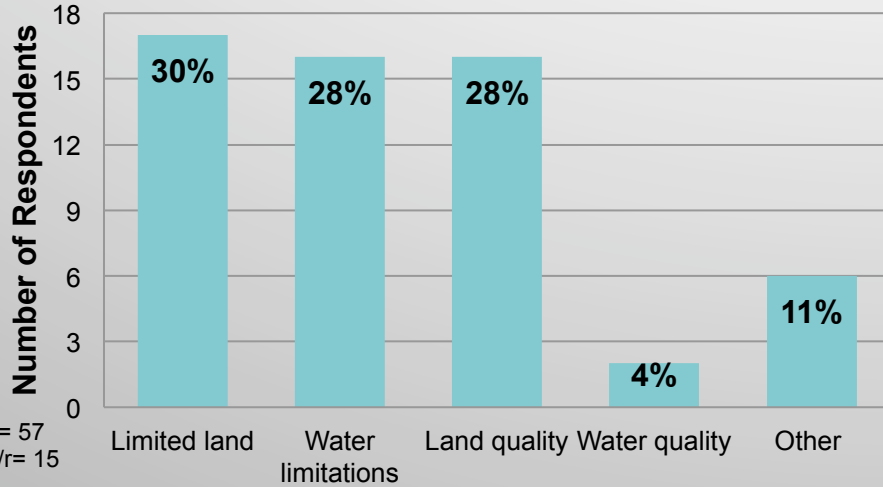


## Berry Session

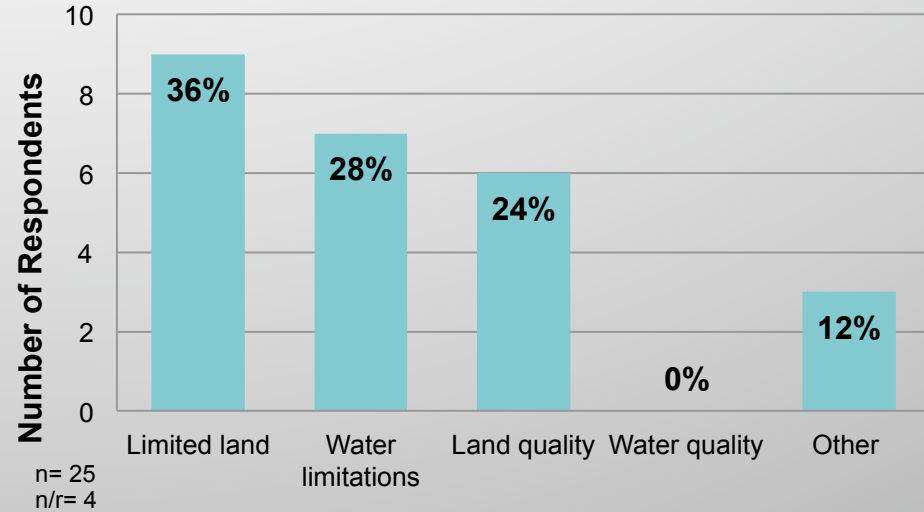


# #1 Natural Resource Barrier

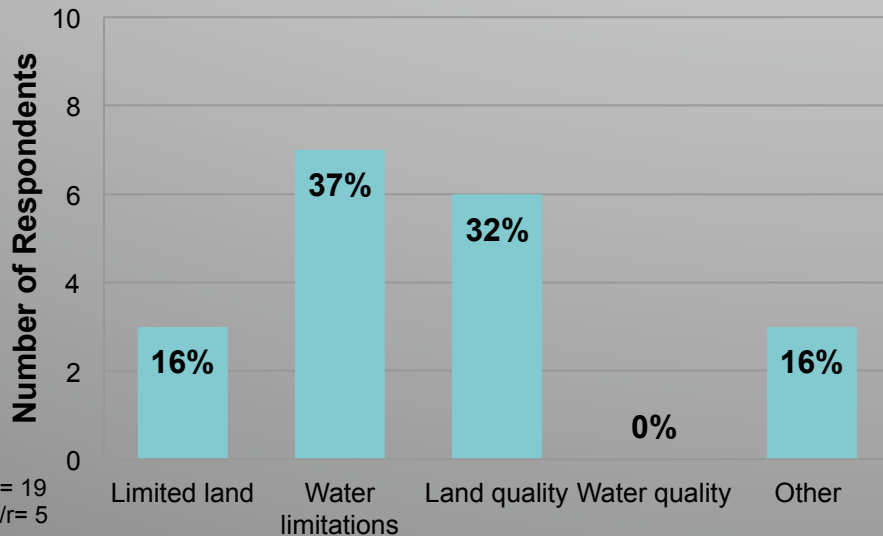
## All Sessions



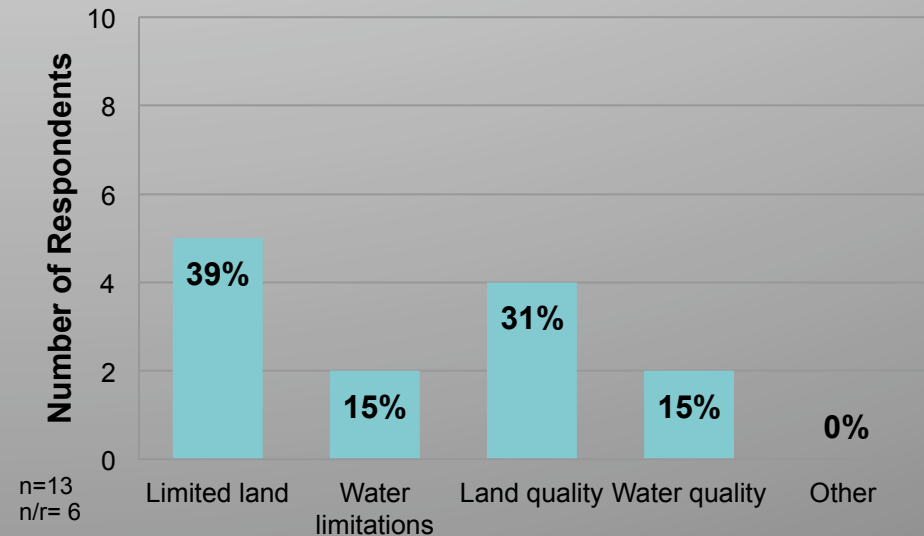
## Vegetable Session



## Organic Session

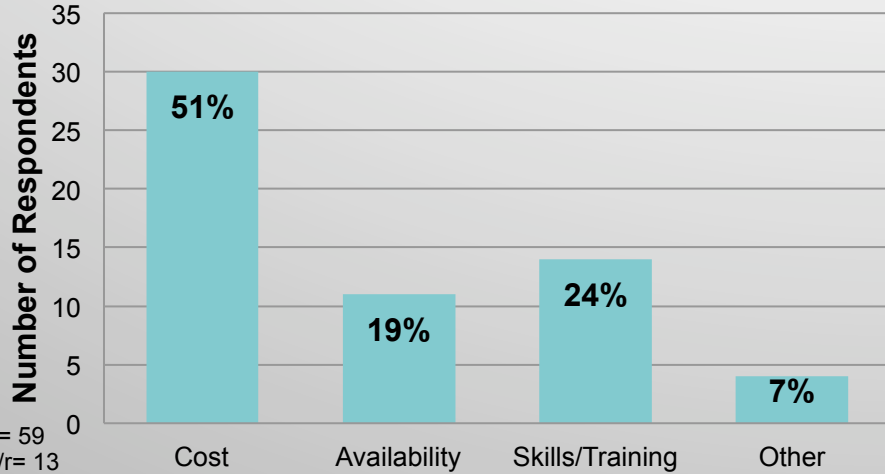


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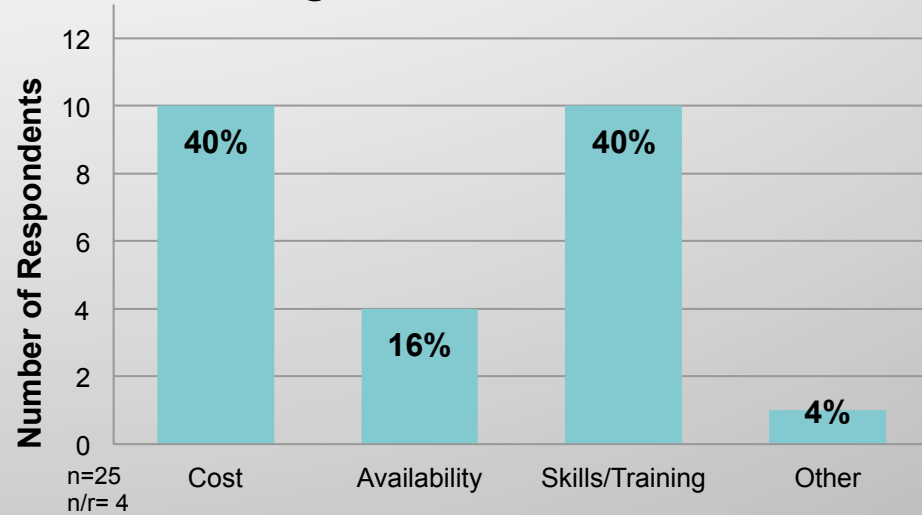


# #1 Labor Barrier

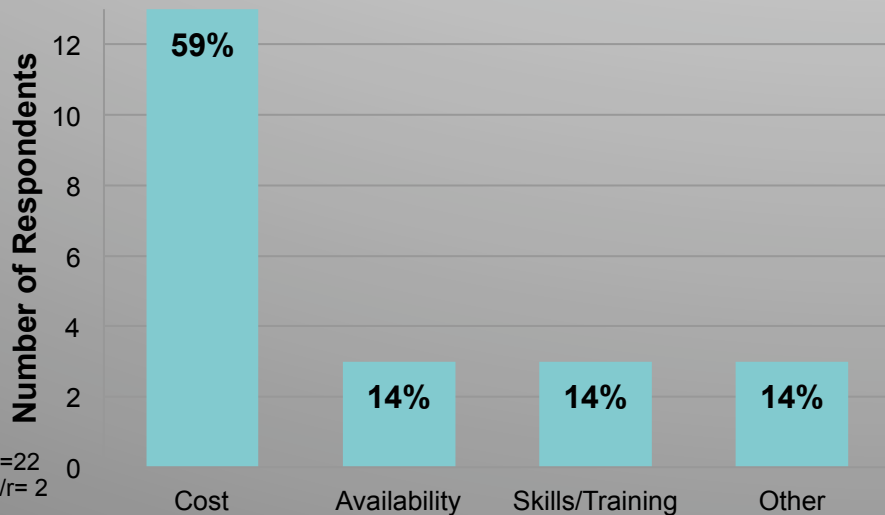
## All Sessions



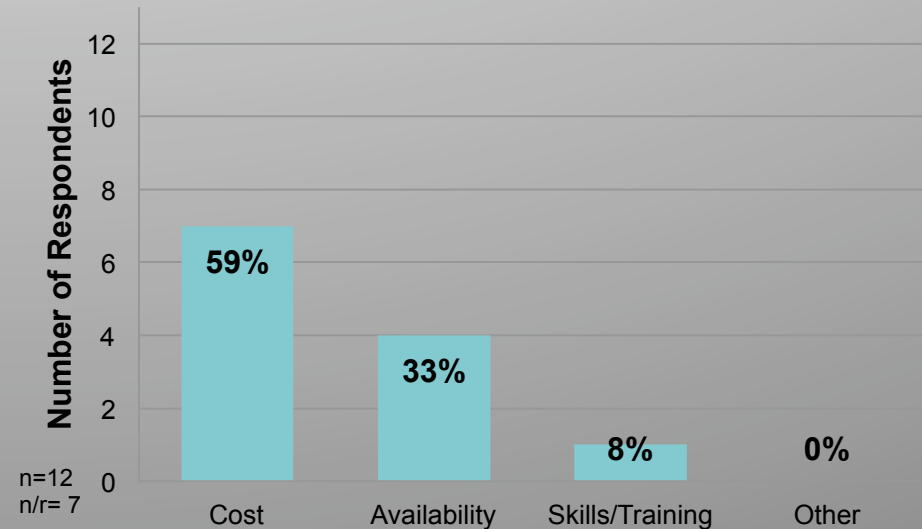
## Vegetable Session



## Organic Session

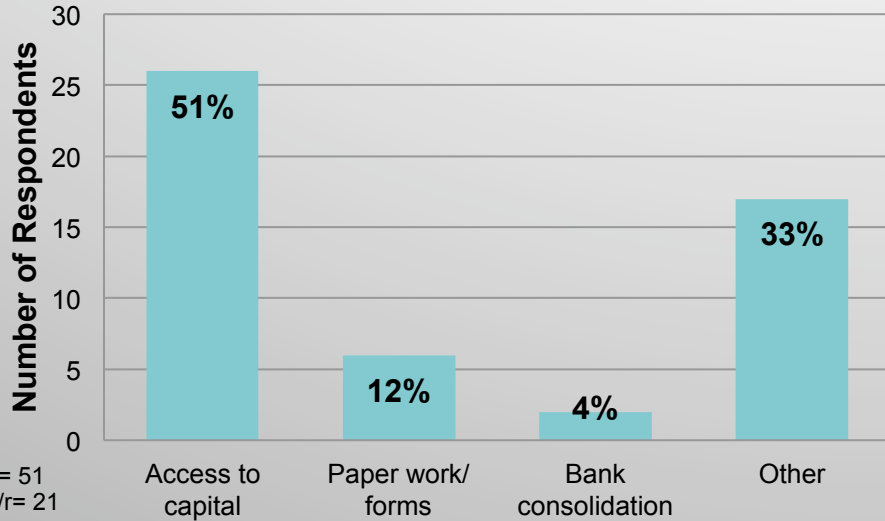


## Berry Session

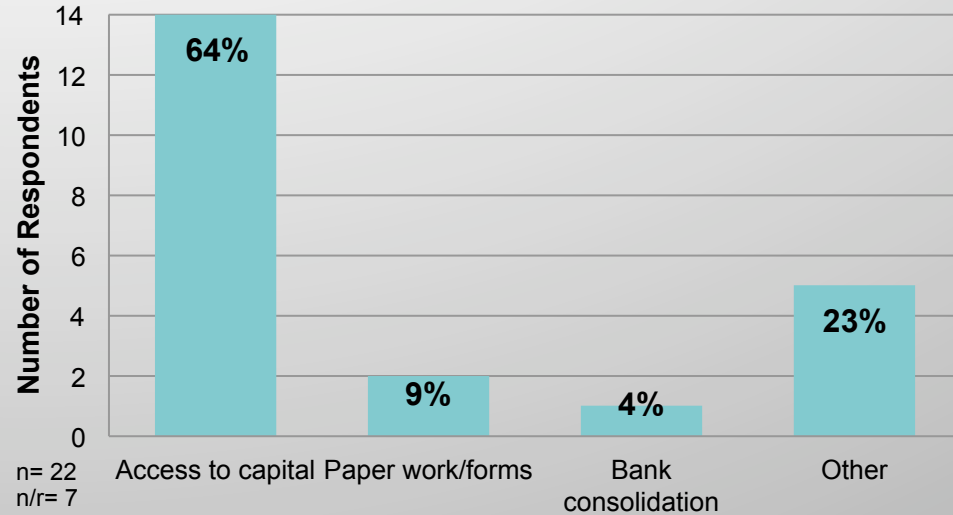


# #1 Financial Barrier

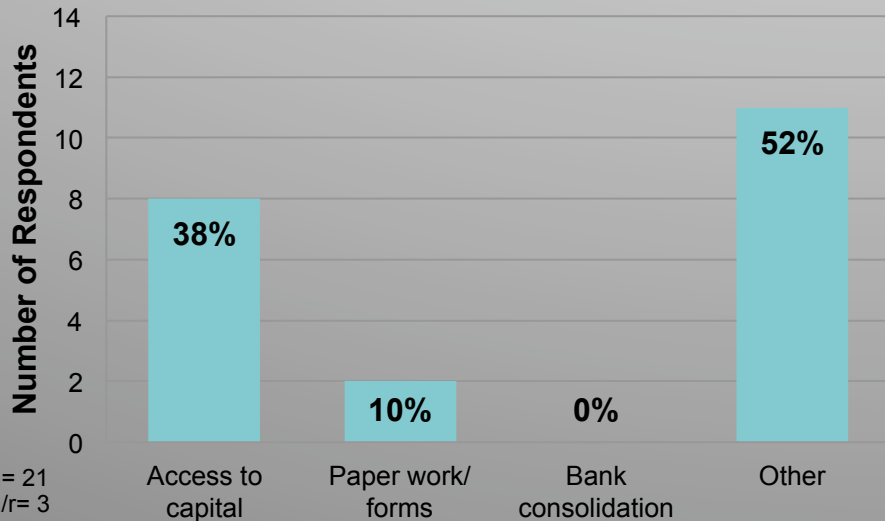
## All Sessions



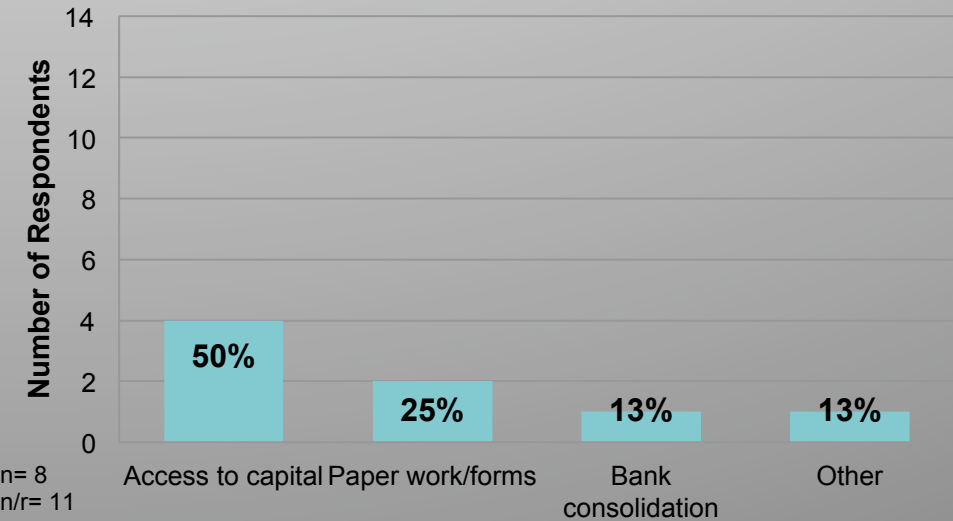
## Vegetable Session



## Organic Session

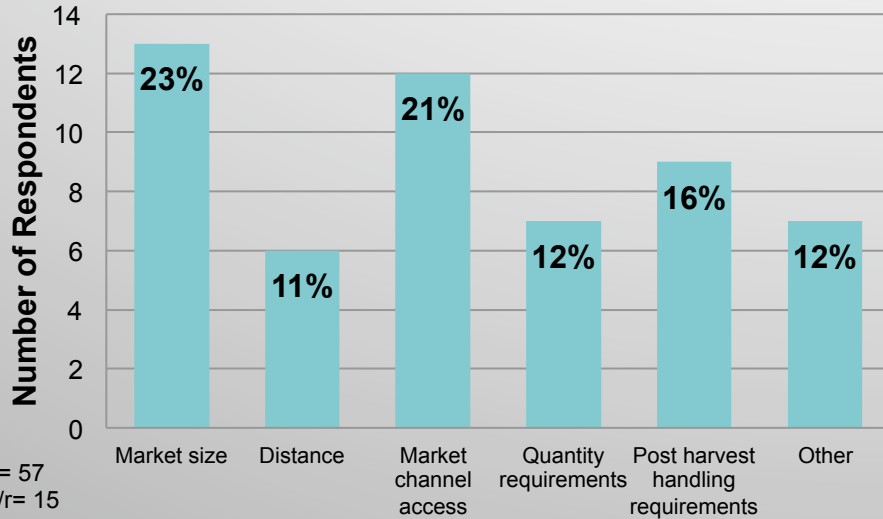


## Berry Session

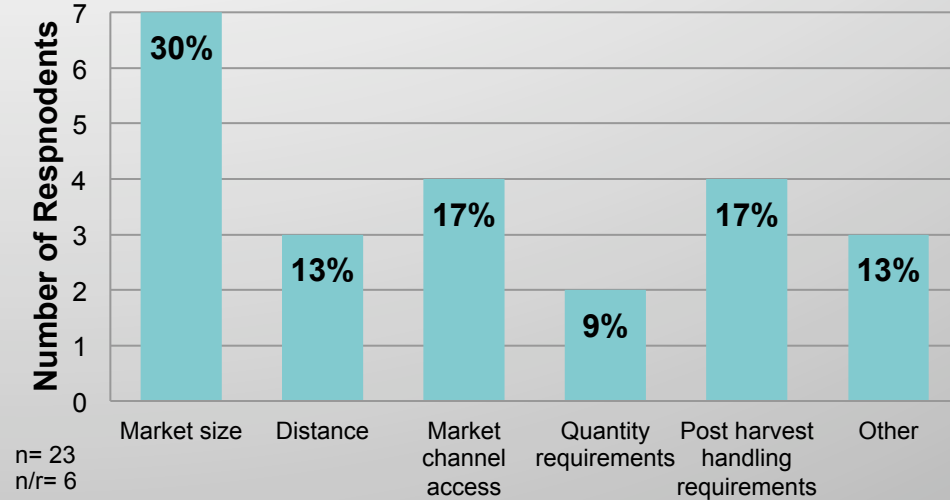


# #1 Market-Related Barrier

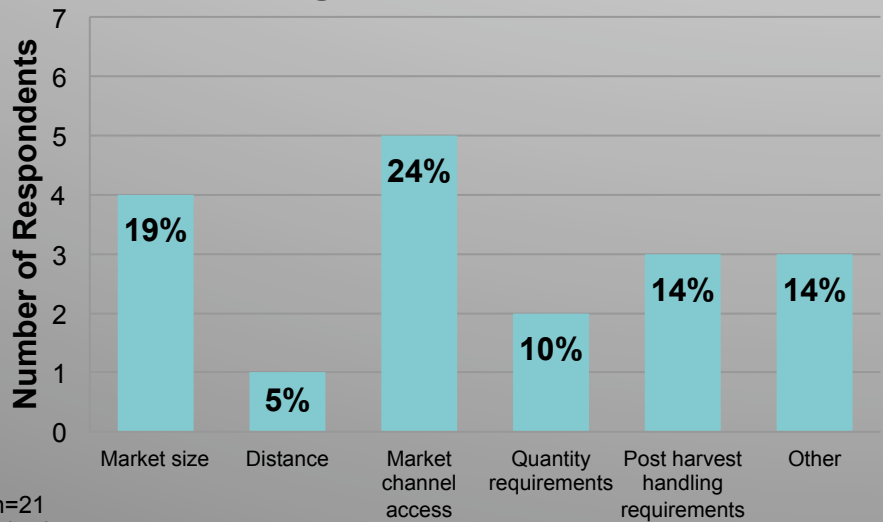
## All Sessions



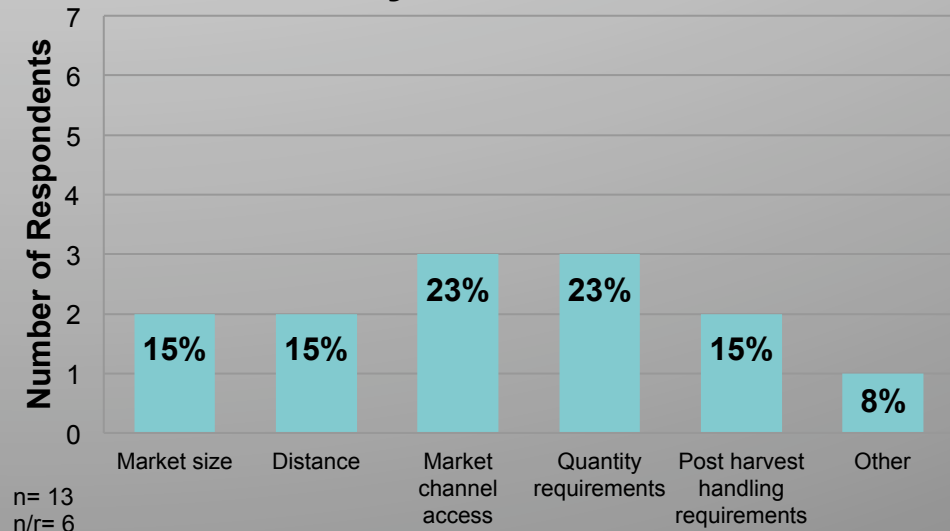
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## Organic Session



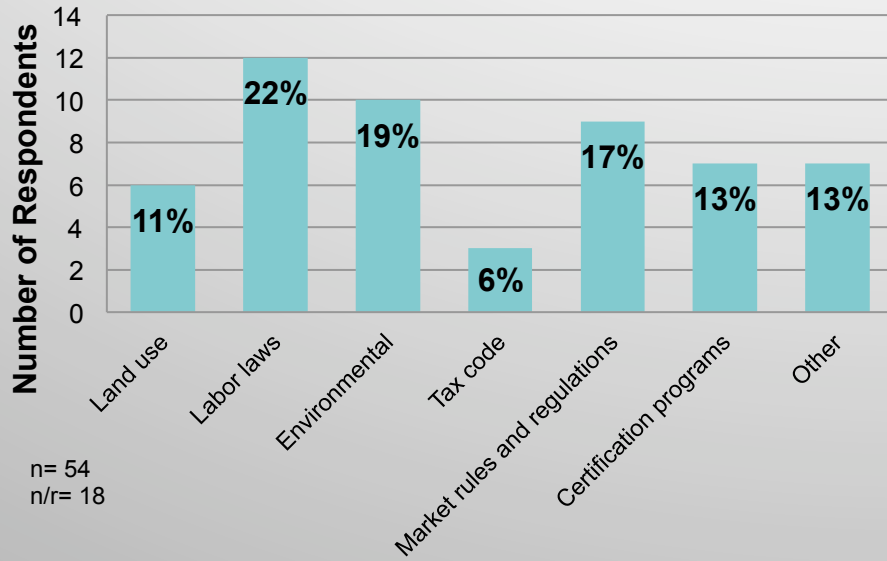
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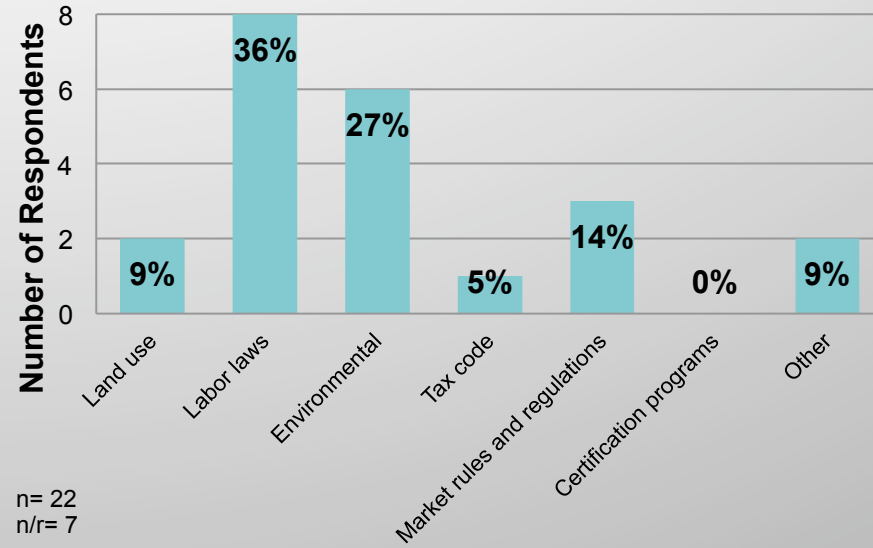


# #1 Regulatory Barrier

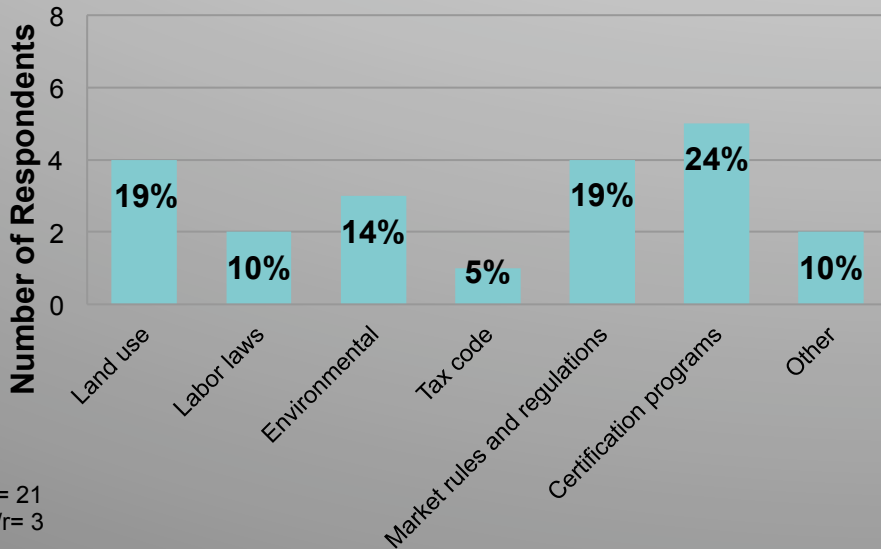
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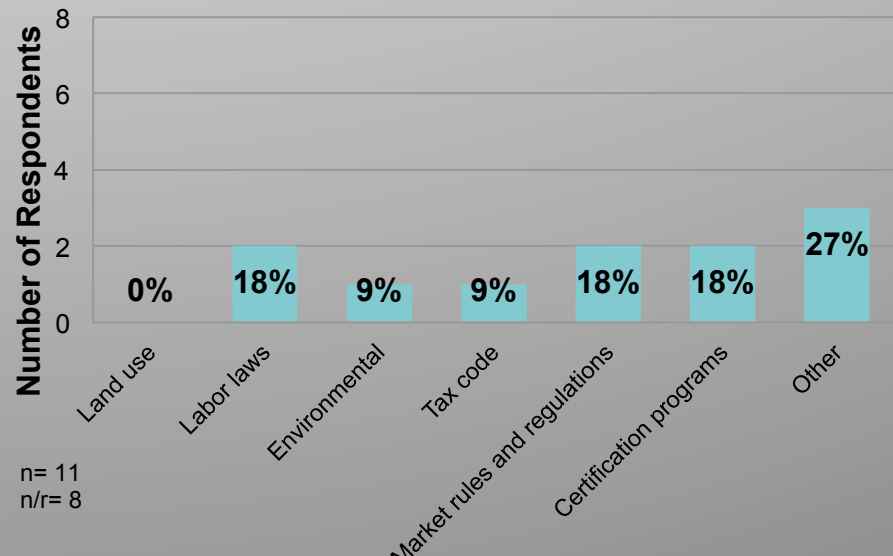
## Vegetable Session



## Organic Session



## Berry Session



# The next six figures include data on Oregon farms taken from the 2007 U.S. Census of Agriculture

Annual value of sales	Oregon	North Willamette	Clackamas	Washington	Multnomah	Columbia	Yamhill	Polk	Marion
Less than \$1,000	11,763	3,908	1,242	487	122	245	622	440	750
\$1,000 to \$2,499	5,687	2,165	688	220	112	217	348	167	413
\$2,500 to \$4,999	4,651	1,616	540	210	66	128	266	126	280
\$5,000 to \$9,999	3,934	1,428	438	216	69	97	220	152	236
\$10,000 to \$19,999	2,807	884	314	118	38	59	124	70	161
\$20,000 to \$24,999	923	292	86	50	10	10	55	22	59
\$25,000 to \$39,999	1,592	503	141	86	24	16	93	42	101
\$40,000 to \$49,999	680	219	65	35	11	4	34	22	48
\$50,000 to \$99,999	1,838	595	153	97	27	11	123	43	141
\$100,000 to \$249,999	1,939	620	150	79	38	11	113	69	160
\$250,000 to \$499,999	1,077	305	55	59	18	4	38	44	87
More than \$500,000	1,662	620	117	104	28	3	79	55	234
<b>Total of Farms</b>	<b>38,553</b>	<b>13,155</b>	<b>3,989</b>	<b>1,761</b>	<b>563</b>	<b>805</b>	<b>2,115</b>	<b>1,252</b>	<b>2,670</b>

Table A1. Number of farms by value of farm sales by state, North Willamette region, and by selected counties.

Annual value of sales	Oregon	N. Willamette Co.'s compared to State	N. Willamette Co.'s	Clackamas	Washington	Multnomah	Columbia	Yamhill	Polk	Marion
Less than \$1,000	31%	33%	30%	31%	28%	22%	30%	29%	35%	28%
\$1,000 to \$2,499	15%	38%	16%	17%	12%	20%	27%	16%	13%	15%
\$2,500 to \$4,999	12%	35%	12%	14%	12%	12%	16%	13%	10%	10%
\$5,000 to \$9,999	10%	36%	11%	11%	12%	12%	12%	10%	12%	9%
\$10,000 to \$19,999	7%	31%	7%	8%	7%	7%	7%	6%	6%	6%
\$20,000 to \$24,999	2%	32%	2%	2%	3%	2%	1%	3%	2%	2%
\$25,000 to \$39,999	4%	32%	4%	4%	5%	4%	2%	4%	3%	4%
\$40,000 to \$49,999	2%	32%	2%	2%	2%	2%	0%	2%	2%	2%
\$50,000 to \$99,999	5%	32%	5%	4%	6%	5%	1%	6%	3%	5%
\$100,000 to \$249,999	5%	32%	5%	4%	4%	7%	1%	5%	6%	6%
\$250,000 to \$499,999	3%	28%	2%	1%	3%	3%	0%	2%	4%	3%
More than \$500,000	4%	37%	5%	3%	6%	5%	0%	4%	4%	9%

Table A2. Percentage value of farms by value of farm sales by state, North Willamette region, and by selected counties.

	Farms	Land in farms (acres)	Average farm size (acres)	Median farm size (acres)
Oregon	38,553	16,399,647	425	29
Clackamas Co.	3,989	182,743	46	15
Columbia Co.	805	57,758	72	23
Marion Co.	2,670	307,647	115	17
Multnomah Co.	563	28,506	51	15
Polk Co.	1,252	166,663	133	30
Washington Co.	1,761	127,984	73	16
Yamhill Co.	2,115	180,846	86	20

Table A3. Number of farms, total farm land, average and median farm size in Oregon and North Willamette counties.

	Total Farms	1 to 9	10 to 49	50 to 179	180 to 499	500 to 999	>1,000
Oregon	38,553	25%	37%	19%	9%	4%	7%
Clackamas Co.	3,989	38%	44%	14%	3%	1%	0%
Columbia Co.	805	24%	49%	20%	5%	1%	1%
Marion Co.	2,670	34%	39%	15%	7%	3%	2%
Multnomah Co.	563	39%	43%	13%	4%	2%	0%
Polk Co.	1,252	21%	41%	25%	6%	3%	3%
Washington Co.	1,761	34%	41%	17%	5%	2%	1%
Yamhill Co.	2,115	25%	48%	18%	6%	2%	1%

Table A4. Percent of total farms in Oregon and Northern Willamette valley counties by farm size in acres.

	Total Farms	Primary Occupation			Average age (yrs)	Male	Female
		Farming	Other	Some off-farm work			
Oregon	38,553	46.2%	53.8%	65.8%	58	78.6%	21.4%
Clackamas Co.	3,989	41.3%	58.7%	68.8%	57	77.1%	22.9%
Columbia Co.	805	38.5%	61.5%	68.3%	58	76.3%	23.7%
Marion Co.	2,670	46.4%	53.6%	65.1%	56	82.7%	17.3%
Multnomah Co.	563	45.1%	54.9%	61.3%	58	75.3%	24.7%
Polk Co.	1,252	43.5%	56.5%	66.1%	58	80.5%	19.5%
Washington Co.	1,761	45.0%	55.0%	67.1%	57	78.1%	21.9%
Yamhill Co.	2,115	38.7%	61.3%	70.1%	57	79.8%	20.2%

Table A5. Percent of total farms in Oregon and North Willamette valley counties by principle operator occupation, average age, and sex.

	Total Farms	Total farm land	Owners of all land		Rent some land		Rent all land	
			Farms	Acres	Farms	Acres	Farms	Acres
Oregon	38,553	16,399,647	78.2%	45.4%	16.0%	45.4%	5.8%	9.2%
Clackamas Co.	3,989	182,743	84.0%	50.2%	12.0%	45.5%	4.0%	4.2%
Columbia Co.	805	57,758	82.7%	64.3%	14.9%	34.5%	2.4%	1.3%
Marion Co.	2,670	307,647	74.4%	32.7%	18.0%	53.5%	7.6%	13.8%
Multnomah Co.	563	28,506	74.2%	48.5%	20.1%	48.2%	5.7%	3.3%
Polk Co.	1,252	166,663	80.1%	30.7%	14.4%	61.1%	5.5%	8.2%
Washington Co.	1,761	127,984	79.3%	38.5%	14.3%	50.3%	6.4%	11.2%
Yamhill Co.	2,115	180,846	83.5%	52.9%	12.5%	40.5%	4.0%	6.6%

Table A6. Land tenure by percent of total farms and acreage for Oregon and North Willamette valley counties.

**Sustainable Agriculture and Education Project  
Portland Regional Foodshed Economy  
January 2012**

**Summary of Phase I Interviews Results**

A research team that includes OSU Cooperative Extension, Portland State University's Institute of Metropolitan Studies, Cogan Owens Cogan, LLC and the City of Damascus is working to identify challenges and opportunities faced by urban agricultural producers with the goal of increasing the financial success of food producers and the vitality of the Portland regional food economy. The project is funded by the USDA's Sustainable Agriculture Research and Education (SARE) program.

As part of the SARE project, Cogan Owens Cogan, LLC and the City of Damascus conducted a series of interviews with policy makers with the intent of developing a toolkit that agricultural producers and regional policy-makers can use to overcome identified challenges and help create more robust and sustainable regional agricultural economy.

The following is a summary of information gathered during the interviews and is followed by a compilation of verbatim responses. A list of interviewees is included in an appendix.

**1. *Do you agree that these are the major challenges urban ag producers face? Is any thing missing?***

Interviewees generally agree with the challenges identified in the Current Situation Report but had varying opinions on which challenges are the most important to address.

**Land Use/Regulations and Requirements**

The conversion of good farmland for more intense development is of concern to many policy makers. Rural development and uses may dilute the long-term viability of farms. Land is valued for the "highest and best" use, which is usually not considered to be food production. There is pressure to develop lands along the urban growth boundary (UGB) and producers receive lucrative offers to sell to developers. One interviewee feels that the conversion of agricultural land may be an opportunity if highly local markets associated with growth can be stimulated. Policy makers suggested several tools to reduce the pressure to develop and help retain existing farms, including transfer of development rights (TDR) programs and purchasing easements, tax incentives and land trusts.

Several possible mechanisms for allowing agricultural uses in urban areas were mentioned, including long-term leases for city green spaces that eventually transition to development, designating them as core infrastructure lands (food, water, etc.) or as part of a Goal 9 employment inventory. Several policy makers suggested that land use is less of a barrier than the diversification of agricultural activities, such as agri-tourism, processing, farm stands, farm stands and education/"agri-tainment".

Conflicts between farming and adjacent urban uses were also discussed. Buffers are needed to protect residential areas from industrial farming and chemicals. The top regulatory barrier to urban

agriculture is fertilizer and pesticide regulation. Protecting farms in urban areas from vandalism is another issue. How can land uses be transitioned to meet the needs of growers and reduce these conflicts?

### **Processing/Distribution**

Food processing is a challenge for small, urban farms. Farmers raising animals are required to have them butchered and inspected by a USDA agent to be sold to local restaurants. The lack of USDA-inspected mobile meat processing facilities makes it extremely prohibitive for a small livestock producer to sell through the retail channel. More USDA facilities are needed to provide for urban area farmers to process their crops/animals.

The cost of food distribution is high and can be prohibitive. While efficiencies in using existing transportation mechanisms may help alleviate some of that cost burden, it may be worthwhile to explore ways to avoid transportation costs that are not directly linked to goods sold. Producers using farmers markets as a revenue stream usually bear the cost of production and transportation and hope that buyers will purchase their products. There is also the time invested by the farmer in loading, transporting, unloading and waiting for customers. An online farmers market system could provide more small farms to sell food locally and could also reduce transportation costs if combined with food pickup locations on a standard route. One policy maker suggested that the aggregation and distribution of agricultural products should be a main focus; possibly sub-regionally.

### **Capital/Land**

Land availability is not the issue in urban areas. The cost of land and creating greater access to working capital for farming are the challenges.. Without it, farm operations are less resilient to unexpected events that create financial stress. With access to borrowed capital, debt load can become an issue. Access to capital needs to include the education and management training to help producers use this resource responsibly. Federal, state and private resources are needed. A revolving loan fund, such as the Regional Investment Boards for the traded sector, may be one solution.

### **Labor**

Labor is another challenge often cited by interviewees in terms of the labor force and farmworker housing. There are not enough documented skilled or unskilled workers. Undocumented workers can't be advertised for legally. Day labor center may address need of laborers and employers. A focus on family-wage jobs and educational process to ensure a documented workforce is ready are needed.

### **Water**

Water in urban areas is more scarce and expensive, and there is significant potential for climate change to negatively impact water availability. For small farms with less than ample water supplies, this condition can disrupt production unless new sources of water can be found or crops are changed to those that consume less water. Producers in Limited Ground Water Resource Areas, see this as a particularly significant barrier.

### **Regional Foodshed Cluster Development**

Policy makers support the development of a regional foodshed economic cluster. Strong leadership and a convenor or clearing house are needed. Several entities, such as Metro, EcoTrust, FFI information or OSU Extension could serve this function.

Import substitution is a viable economic opportunity, but there is a need to define potential markets and products. More institutions and large markets are needed. The 2013 Farm Bill will focus on regional foodshed plans and local, healthy food.

## **2. *Is your agency working on/analyzing any of these challenges?***

Most interviewees stated that their agencies are working to address these challenges. Actions include:

- Activities include assessing land use and regulatory barriers for production; Grocery Stores Initiative; food justice issues; and farm bill tracking.
- Developing an Agriculture Investment Strategy, including ways to improve access to capital with federal and state partners.
- Lobbying for changes in land use regulations.
- Financial support for farmers markets to help keep local farm soils actively managed and in production.
- Programs include Integrated Waste Water Management planning and Farm/Nursery workshops with local producers.
- Drafting a land development code that will take urban agriculture into consideration.
- Need to address provision of migrant housing in policies/regulations.
- Focus on facilitating urban development, including: TDRs; model farms for food production in urban areas associated with dense development; Nature in the Neighborhoods to innovate in urban ag.
- Focus on economic development, job creation and family-wage jobs, including SNAP to encourage local healthy food; community food system.
- Assessing whether and how to organize a county-focused food effort.
- Programs that focus on land conservation and coordination in the region: match 50% for approved conservation practices; interested in harvesting if economically practical; vertical and greenhouse ag seasonal high tunnels; organic initiative to help transition planning cost sharing for conservation practices.
- Land use program includes TDR analysis, rural reserves; agricultural zoning may be examined in the future.

## **3. *What can be done to overcome these challenges? Which potential tools would be most effective in addressing the challenge?***

Policy makers proposed a broad range of tools to address urban area agriculture issues. A majority of responses pertained to land use issues. Interviewees suggest a closer examination of Oregon's Agriculture Goal (Goal 2), developing recommended strategies, and working with policy makers to implement these recommendations, including updating state statutes and local land use regulations. This is particularly important for agri-tourism and other diversified agricultural activities. Other tools include transitioning land uses adjacent to agricultural lands, allowing urban agriculture in open space zones, TDRs, supporting demonstration farms.

Other interviewees suggested economic tools. Policy makers support developing a regional food economic cluster strategy. Other proposed economic tools include: export expansion, farm incubators, vertical agriculture, and mixed-use development surrounding agricultural production areas. Farmers need improved access to improved/innovative funding sources and supplemental income strategies.

Several tools to address processing and distribution challenges were mentioned. Additional processing units or co-ops to share the costs and benefits of processing units are needed. Regional distribution facilities should be located strategically to capitalize on transportation routes.

Strategies to address labor issues include focusing on a “shared” labor strategy to improve access to qualified workers, and developing a farmworker housing model with the FHDC.

**4. Are there other models or tools used elsewhere that you are aware of that would help address this/these challenge(s)? (note which challenge)**

Again, policy makers provided a variety of models and tools that have been used in other places, including:

- Baltimore uses tax incentives and reductions to encourage urban agriculture.
- Montana has a huge processing facility built with federal funds and that allows community use of the kitchens.
- Screening facilities for migrant workers to ensure documentation is met.
- Door County, Wisconsin has a regional branding program for their ag products.
- Programs in Canada and the Midwest support advanced growing options 365/24/7, biomass and greenhouses.
- Innovative development strategies, such as urban farm and park concepts (condo gardens), farms permitted under standards similar to those for golf courses,
- The Illinois Food, Farm and Jobs Act of 2007.
- Innovative programs in the Cleveland area.
- A hub for helping workers get documented and find work like the one along Highway 211 between Woodburn and Molalla.
- Mercy Corps “Seeding Change” finance and farming services.
- Cooperatives for distribution and processing like Red Tomato.
- Willamette Valley joint branding.
- Transfer of development rights programs.
- New food waste policies.
- Micro-financing for urban farmers.
- An education program or center to teach how to grow, process and cook food.
- A Climate Resiliency Plan like the one developed by the Willamette University Climate Leadership Institute.
- Re-localizing agricultural production with adaptive food crops.

**5. Is there anything else you would like to share or suggest we consider?**

Additional suggestions include:

- Succession planning for aging farmers. California Farm Link (young/old farmer link) is a good model.
- Explore a Willamette Valley-wide growth strategy
- Consider how crops can be stored for market or off-season sales.
- Research ways to extend the growing season.
- Advance agri-tourism outside the UGB as in Yamhill County and the City of Ashland.
- Emphasize increased urban development of centers or towns.
- Focus on family-wage jobs.
- Import substitution.



- Streamline regulations.
- Support organic production.
- Link local healthy foods to regional centers and economic development cluster strategies.

## Compilation of Interviews Results

### 6. *Do you agree that these are the major challenges urban ag producers face? Is anything missing?*

- Covers the issues well, but leadership for the regional ag economy/foodshed is missing. I would increase the focus on aggregation/distribution; possibly sub-regionally. Also, waste management and closing the loop on food, energy and water.
- The top barrier mentioned in the Ag Investment Survey is fertilizer and pesticide regulation. Farmers report being hampered by regulation from doing their best to grow their crops. A second barrier is the Oregon Tax Structure; farm deferral and property taxes. Could be a good area to probe in follow-up discussions. AICCPA (American Institute of Certified Public Accountants) might be a resource for farmers in terms of tax benefits. A third barrier is labor concerns consistent with the SARE findings. Not enough documented workers, skilled or not skilled. Undocumented workers can't be advertised for legally. How do you resolve immigration issues/worker availability? Not able to statistically provide breakdown of documented and undocumented workers. Day labor center may address need of laborers and employers. An educational process to ensure documented workforce is ready is needed. Need for capital for farming. Resources needed (federal, state, private). A revolving loan fund may be an example, such as the Regional Investment Boards for the traded sector. Land use is less of a barrier. Diversification of ag. (agri-tourism, processing, farm stands, farm stands, education/agri-tainment) is problematic from a land use perspective. Rulemaking required, which requires statewide participation.
- Watch rural development/uses diluting the long-term viability of farms. Mostly concerned about the conversion of good farmland, e.g., Washington County. Productive, flat, excellent soils. Buffering with industrial farming can be an issue, particularly where the "buffer" is a trail that brings people in and close to industrial farming and chemicals. The trend is toward smaller, parcelized areas. Ag inside the UGB is a tough topic. Could possibly be allowed as a core infrastructure (food, water, etc.); or as part of a Goal 9/employment inventory. Shouldn't be used to expand.
- The items presented in the white paper do address most of the major challenges faced by urban agricultural producers. Some items missing that may also be significant include:
  - Processing – the lack of USDA-inspected mobile meat processing (butchering) facilities makes it extremely prohibitive for a small livestock producer to sell through the retail channel.
  - The cost of distributing food is high. While efficiencies in using existing transportation mechanisms may help alleviate some of that cost burden, it may be worthwhile to explore ways to avoid transportation costs that are not directly linked to goods sold. Producers using farmers markets as a revenue stream usually sell on speculation; they bear the cost of production and transportation and hope that buyers will purchase their products. There is also the time invested by the farmer in loading, transporting, unloading and waiting for customers, then loading, transporting and unloading again to consider. An online farmers market system could provide more small farms to sell food locally, and combined with food pickup locations on a standard route, could also reduce transportation costs.
  - Access to working capital is a major issue, and it cuts both ways. Without it, farm operations are less resilient to unexpected events that create financial stress. With access to borrowed capital, debt load can become an issue. Access to capital needs to include the education and management training to help producers use this resource responsibly.

- Pressure to convert agricultural land is a problem. It may be an opportunity, however, if highly local markets associated with growth can be stimulated. Perhaps programs like transfer of development rights and purchasing easements can help remove some of that pressure. The real issue is that we value land at the highest and best use, and that highest use is usually not considered to be food production. Environmental deterioration related to some development may affect agricultural land.
- There is significant potential for climate change to negatively impact water availability. For small farms with less than ample water supplies, this condition can disrupt production unless new sources of water can be found or crops are changed to those that consume less water.
- The following barriers are most important:
  - Land Use barriers – development encroachment which can cause nuisance/conflicts between farms and neighbors. But also, how do we mix uses appropriately to meet the needs of growers? What about transitions of land uses?
  - Producers in the fringe areas see dollar signs and sell to developers. How do we look at retaining existing farms? Tax incentives? Land trusts?
  - City green spaces that are leased? How to address long term leasing and eventual transition to development?
  - Environmental concerns – over time, soils can be contaminated with heavy metals. Pesticide use close to residential populations is another challenge.
  - Vandalism –Farmer Larry Thompson has already had issues with people vandalizing fields, i.e. driving through them, stealing crops, etc. This needs to be addressed in an urbanizing area. Physical security of farms is an issue.
  - Access to markets – How to get local farmers in grocery stores. I think some farmers need small business help and marketing strategies. Some are not moving toward CSA's.
  - Food processing places in the area. People raising animals have to have them butchered and inspected by a USDA agent to be sold to local restaurants, etc. Need more USDA facilities to provide for urban area farmers to process their crops/animals.
  - Producers in Damascus need to think about water. They are in a Limited Ground Water Resource Area.
  - What are the impacts of alternative development scenarios on ag land?
- Focus on land use laws and practices, the cost of land for ag in urban areas, and food production for tenants in housing.
- Focus on developing a food system, ag economic cluster (production, processing, distribution, consumption). Also focus on family wage jobs. More institutions and large markets are needed. The 2013 Farm Bill will focus on regional foodshed plans and local, healthy food.
- Yes, they match well with the interviews done in Washington County. Main foci include:
  - Distribution system
  - Processing for small growers
  - Labor issues/farm worker housing
  - Capital access, especially to finance land purchases and transfers
  - Import substitution – need to define potential markets and products
- These seem to be the major challenges and the opportunities/strategies are worth developing. We need a regional convenor and clearing house, possibly Metro, Ecotrust, FFI information, or OSU Extension. Farm land foundations and purchases – East Multnomah Conservation District.
- You touched on everything, but most important are:
  - Import substitution as an economic opportunity
  - Potential of local consumption

- Economic cluster development
- Capital availability

Land cost in urban areas is the major problem, not availability. Not in favor of water changes in ag land use.

**7. *Is your agency working on/analyzing any of these challenges? If so, please describe.***

- The 2012 Food Policy Council work plan will likely include:
  - Assessing regulatory barriers for production as well as land use (see Portland code update and Oregon Public Health Institute’s work)
  - Mayor’s grocery stores initiative; funded through PDC – HEAL (Healthy Eating Active Living) AARA grant funded work
  - Food justice
  - Farm bill tracking
- Some work being done in the ag investment strategy but is still in the early research stages. The business and economic development team is considering strategies to help overcome the access to capital challenge with federal (USDA) and state (Business Oregon) partners.
- We are a small agency; marketing department has taken over what Business Oregon doesn’t for Oregon Ag. Reminder that ag is a traded sector industry. We do a lot of lobbying and speaking on this issue. Regarding changes in land use, the Farm Bureaus just met at their annual conference and strongly rejected sub-regional approaches/standards for ag.
- We are not working on these challenges, but do provide financial support to several farmers markets. The purpose of that support is to help keep local farm soils actively managed and in production.
- Yes. We are working or have worked on the following:
  - Integrated Waste Water Management planning.
  - Conducted background research on urban ag. Held Farm/Nursery Workshop with local producers.
  - Damascus has an existing “farm culture” that is understood by residents. This is helpful as the city urbanizes. It may help smooth the transitions that will take place.
  - We are drafting a land development code that will take into consideration urban agriculture.
  - Need to address provision of migrant housing in policies/regulations.
- Focus on facilitating urban development. We have limited band width for working on the food system. We conducted a study of TDRs. We own farms, e.g. Sauvie Island Farm that can be a model. Food production in urban areas associated with dense development, e.g. 39<sup>th</sup> and Division model (Geller Silvas developer). We work on all things tied to jobs and urban areas. Nature in the neighborhoods to innovate in urban ag.
- Farm bill 1) SNAP to encourage local healthy food; 2) community food system. Major issues include 1) MFI Action Plan; 2) Economic Cluster Strategy; 3) Adjust food purchasers allowance. Health Dept focus is on health corner grocery stores. Our focus is economic development; job creation; family wage jobs.
- Washington County is assessing whether and how to organize a county-focused food effort. They will assess/gauge interest and develop an approach. The County was impressed with the Multnomah Food Initiative.
- Energy and water plans are skinny locally. Match 50% for approved conservation practices. We are becoming more strategic and will need to focus resources on our area. We have a watershed focus. Not just a single forum, e.g. Johnson Creek. Also stormwater and are interested in harvesting if it is economically practical. More focus on vertical and greenhouse ag

seasonal high tunnels. Organic initiative to help transition planning cost sharing for conservation practices. Land conservation coordination in region.

- Land use program. TDR analysis. Rural reserves. Ag zoning may be examined in the future. There is an opportunity in Damascus and North Bethany.

**8. *What can be done to overcome these challenges? Which potential tools would be most effective in addressing the challenge?***

- What is the role of Business Oregon?
- Frame it as an economic issue – the food economy.
- Work with policymakers to implement some of these recommendations, including comprehensive plan and code barriers to agricultural diversification.
- Additional processing units are needed (mobile, dispersed, sub-regional).
- Strategically locating distribution centers regionally, access to transportation routes and land.
- Regarding the viability of farms and uses on farms, if there is a legitimate nexus to farm use that doesn't impact neighboring farms, it should be ok. Other uses like grocery stores belong in rural and urban centers. Some farmers are simply opposed to getting a permit, whether for fire, building or food safety.
- Check the goal and statute for food processing, permitted uses. Other uses, where there is no nexus to food production also is often allowed by conditional use.
- Watch creep of uses from seasonal to year round – carnivals, etc. Always need to check the real land use.
- Many growers don't realize you can do a farm stand for your own produce. All planners and economic development staff should check the statutes.
- Agri-tourism can be ok if it is subordinate to and doesn't impact surrounding farming.
- Recent changes in wine country could lead to Napa-like problems of real farmers having compatibility challenges. Always a balancing act.
- Increasing USDA inspection stations and facility visits.
- Do whatever is needed to make farming profitable. Farmers need to make money to stay in business.
- Establish co-ops to share processing costs/benefits.
- Update state land use laws updated for the 21<sup>st</sup> century.
- Transition land zones around cities.
- Transfers of development rights.
- Model urban farms like Larry Thompson proposal for Damascus.
- Agri-tourism in project with counties and state – Damascus and Stafford as examples?
- Can farms be grandfathered based on employment or other standards?
- Create an Economic Development Action Plan and look to Multnomah and Clackamas County leadership.
- Continued Multnomah Food Initiative support for economic development and ag as convenor.
- Possible farm worker housing model with FHDC.
- Develop an economic cluster strategy for food that is focused on “what to do” short term and long term.
- Stronger food hub and expansion into distribution compilation.
- Export expansion – need a data base for small growers.
- Processing – value added strategy needed.
- Improved innovative funding sources.
- Land issues are similar to funding issues.
- Supplemental income strategies.

- Funding availability in the future is a challenge.
- Need outreach, collaboration, strategic approach.
- More focus on techniques of farm land conservation.
- Get young people interested in ag, guide them – like an Americorps for farms.
- Labor access is a big challenge. Maybe focus on “shared” labor.
- Examine ag zoning
- Ag density and employment – Larry Thompson Farm Plan.
- Urban scale ag in open space – intense ag.
- Transition zoning – Damascus.
- Sub area planning – ag production areas (Bethany).
- Demonstration urban farms (Zenger and Luscher).
- Mixed use development with ag production / food growing areas.
- Incubator / economic model – e.g. Vermont, Beaverton, Hillsboro and eastside.
- Vertical agriculture.

**9. Are there other models or tools used elsewhere that you are aware of that would help address this/these challenge(s)? (note which challenge)**

- FHDC work and focus on people not whether are documented / undocumented.
- Conversation around labor generally not on the table.
- More advanced growing options (365/24/7). Energy-biomass, greenhouses. (Canada, Midwest)
- Along Highway 211 between Woodburn and Molalla there is a fellow – Pedro is his first name – that is a hub for helping workers get documented and find work. We need more such hubs.
- Mercy Corps “Seeding Change” finance and farming services (KG mentioned): Thompson’s farm is a site: <http://www.mercycorpsnw.org/what-we-do/refugee-farming/>.
- What transitional uses should be allowed on farmland?
- Baltimore, MD used tax incentives/reductions to encourage urban agriculture.
- Montana-has huge processing facility with community use allowed of kitchen(s). This project was built with federal funds and grants.
- Provide for screening facilities for migrant workers to ensure documentation is met.
- Door County, WI has regional branding of their ag products.
- TDRs.
- Urban farm/park concept e.g. condo gardens.
- Requirements for food production areas with development.
- Vision of ag tourism.
- Food waste policy.
- Farm as new golf courses permitted under similar standards.
- Micro financing for agri-farmers.
- Adjust food purchasers allowance – County will convene.
- Cooperative for distribution and processing like Red Tomato.
- Willamette Valley joint branding.
- Economic cluster strategy.
- Education program or center to teach about how to grow, process, cook food.
- Climate resiliency plan, e.g. Willamette University Climate Leadership Institute.
- Relocalize with adaptive food crops.
- Food policy has gone exponential, need to focus energy.
- Major change to focus on local healthy food and local economy.
- How to interact with farmers to learn of opportunities and needs.
- TDRs.

- Illinois legislation. Illinois Food, Farm and Jobs Act 2007 [www.foodfarmjobs.org](http://www.foodfarmjobs.org).
- Cleveland area.

**10. Is there anything else you would like to share or suggest we consider?**

- How to turn this framework into action? Come back with policy updates.
- SARE team to present to FPC?
- Succession planning (avg. farmer age is 68-71) – 66% report not having a succession plan in place. California Farm Link (young/old farmer link) is a good example/resource.
- Also talk to:
  - Brent Searle, Special Assistant to the Director (Katy Coba), Agricultural Economist, focuses also on Federal/Farm Bill/policy. 503.986.4558
  - Ron Eber, 360.930.8500 or 503.507.3444, ronaldeber@comcast.net; former DLCD
  - Kathryn, new Goal 3 and 4 specialist, DLCD
  - Steve Cohen (City of Portland?)
- ODA needs additional R&D strength, also funding for this emerging and ever-changing sector.
- Should look at Valley-wide growth strategy. Where is it really important?
- Crop storage: refrigerated trucks are noisy. Need to consider how crops can be stored for market or off-season sales.
- Oregon has limited growing season. Look at how to extend it.
- Need to advance agri-tourism outside the UGB – examples in Yamhill and Ashland. Contact Peter Watts at Jordan Ramis 503-598-5547.
- Need to emphasize increased urban development of centers or towns.
- Jobs, jobs, jobs – family wage.
- Import substitution.
- Possibly interview Sia Lindstrom and Extension in Washington County.
- The sheer volume of regulations is a big problem. Can we develop a cookbook or program to make it easier; Can someone do it all for a group of farmers?
- Get organic on a level playing field with traditional ag.
- Link local healthy foods to regional centers strategy, economic development clusters strategy. Tie vision to public health and economic development.

# **Sustainable Agriculture and Education Project Portland Regional Foodshed Economy**

## **List of interviewees**

Dick Benner, Office of Metro Attorney

Carlotta Colette, Metro Council

Steve Fedje, Oregon Natural Resources Conservation Service

Stevie Freeman-Montes, City of Beaverton, Department of Community and Economic Development,  
Sustainability Division

Jamie Johnk, Clackamas County Bureau of Business & Economic Development

Jim Johnson, Oregon Department of Agriculture

Weston Miller, Oregon State University Metro Master Gardener Program

Erika Palmer and Dan O'Dell, City of Damascus

Kat West, Multnomah County Office of Sustainability

Anita Yap and David McIntyre, Portland-Multnomah County Food Policy Council