

# Food Producer Survey Report 2022

## Background

In 2021 Ten Rivers Food Web decided that our all-volunteer organization was ready to take on new programming. After much brainstorming and discussion, the following three ideas were deemed both impactful and feasible for us.

1. An online local food directory with a significant social media presence developed in partnership with other organizations.
2. A large new or repurposed building that will serve as a farm-centric hub for shared equipment, crop processing and storage, other farm focused uses, and event space (currently named the Big Bean Barn).
3. A Food Production Advisory Committee designed to be a conduit between local food producers and the organizations that support them.

However, before we rolled up our sleeves to get to work, we wanted to ensure we were in alignment with the needs of food producers in our service area. Our primary reasons for conducting this survey were to:

- Learn from food producers how much impact they believe each program will have on their business and how we could improve each idea.
- Give food producers the opportunity to tell us what additional programming they would like us to consider.
- Start gathering data on food businesses in our service area so that future surveys could identify changes and trends in the years to come.

In January 2022 the survey was advertised through the following organizations that work within our service area of Benton, Lincoln, and Linn Counties: all farmers' markets, Benton County Master Gardener Association, Dry Farming Institute, First Alternative Co-op, Fishermans Market, Friends of Family Farmers, Mary's River Grange, OSU Center for Small Farms & Community Food Systems/ Small Farms Extension, Pacific Seafood Market, and Willamette Farm and Food Coalition. We offered three \$50 local food gift cards as incentives for respondents and over the course of a month received 74 complete responses and 20 more incomplete responses. (Questions listed in Appendix I). Of these, 34 (46%) were residents of Benton County, 11 (15%) were from Lincoln County, and 23 (31%) were from Linn County.

The survey was divided into two parts: 1) questions about respondents' food businesses, and 2) questions about current and proposed Ten Rivers Food Web programming. Key findings are summarized below.

## *Key findings about respondents' food businesses:*

### *Foods produced*

Fresh vegetable growers were most strongly represented among our respondents; this may represent a high proportion of vegetable growers among local food businesses or it may represent a bias in our survey outreach and in historical familiarity with TRFW. We did, however, receive responses from a wide range of local food businesses, including fisherfolk, beekeepers, livestock producers, dairies, mushroom farms, orchards, seed growers, and restaurants/retailers.

### *Sales channels*

Taken together, direct sales to consumers – in the form of CSAs, farm stands, market booths, and pre-order sales – supplied the majority of food production income to respondents' businesses, with wholesale to restaurants, retailers, or distributors representing a much smaller proportion.

Just under 40% of respondents reported conducting all of their sales in Benton, Lincoln, and Linn counties, and another quarter reported conducting over half of their sales in these three counties. One-fifth reported no local sales, indicating that we did reach a subset of local food producers who cater primarily to regional or national markets.

### *Business scale*

Nearly two-thirds of responding businesses had no employees, and only 11% had more than five employees. This is in keeping with the TRFW focus on small- to medium-sized growers, but it appears that larger businesses may have been under-represented in our responses – possibly due to a lower response rate or to the difficulty in routing the survey link to the appropriate personnel in a larger operation.

Our respondents further indicated that, on average, less than half of their total income derived from food production activities or other food-adjacent pursuits (e.g. agritourism), with many also working another job or having substantial outside income.

### *Business age*

We asked respondents to classify the age of their business as less than five years, 5-10 years, 11-20 years, or 21+ years. Responses were more or less equally distributed across the four categories with 21-33% in each group. The 5-10 year group was slightly over-represented.

### *Weather/climate impacts*

We asked respondents if their business had been impacted by recent extreme events. Last summer's heat wave was most impactful, affecting nearly 60% of businesses. By comparison, 40% have been adversely affected by recent drought, 25% by wildfire/smoke, and 15% by flooding. Many respondents experienced multiple impacts, with fewer than one third reporting that they have not been significantly impacted by recent weather/climate extremes.

### *TRFW Programming feedback themes*

Overall we received positive feedback towards both current and proposed programs. The most common feedback we received was that respondents had never heard of the Soil Amendment Sale or Fill Your Pantry. We were not at all surprised by this feedback because we purposefully set out to reach beyond our community with this survey and we were clearly successful. Respondents suggested more promotion to reach a wider audience and more outreach for the Fill Your Pantry event to increase the number of vendors. While we would gladly increase the reach of both events, we cannot do so without more volunteers or contractors. We are squarely sitting in this conundrum and are working to determine how we could grow these events in a way that makes sense.

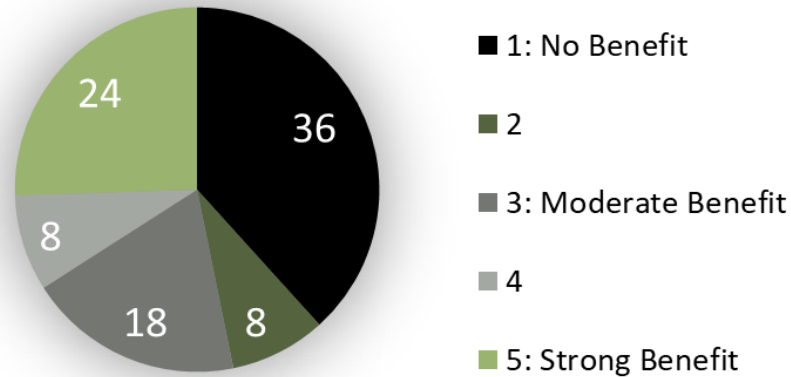
The second theme throughout the survey is that what works for the valley is not the same as what works for the coast. Our service area extends from the Cascades to the coast, from Linn to Benton and Lincoln Counties. On one hand, that region can feed us a wide variety of foods: from grains, beans and produce, all the way to seafood. On the other hand, the needs and challenges of a grower in east Linn are very different from those of a grower in the coastal range. TRFW was founded in the valley and the current leadership all live in the valley. However, we are working to learn more about and better meet coastal needs.

### *Current Program - Soil Amendment Sale*

The annual Soil Amendment Sale began in 1987, and Ten Rivers Food Web has organized the program for the past nine years. This pre-order, bulk-purchasing event provides volume discounts to small-scale growers. Organic soil amendments, soil mixes/ingredients, cover crop seeds, pest

controls and more can be pre-ordered during the entire month of January for pick-up in a drive-through format in early March. The sale has experienced steady growth, and most recently, it distributed 120,000 pounds to 250 local farmers and gardeners in 2022.

On a scale of 1 to 5, how much does the Soil Amendment Sale benefit your business?



A majority of respondents (53%) reported a moderate to strong benefit from the sale and shared comments like “This is a great resource for farmers and gardeners. Thank you!!!” On the other end of the scale, 44 respondents rated the sale as a 1 or 2, which is not favorable. However, when prompted to share how the Soil Amendment Sale could better serve them, 14 people shared they didn’t even know about the sale or they heard about the sale too late. Some reported that their production scale was too large to benefit from the event, and others (e.g. fisherfolk, retailers, restaurants) simply had no use for soil amendments or related products. Beyond what was already noted in the current programming themes section, respondents shared the event would benefit them more if we:

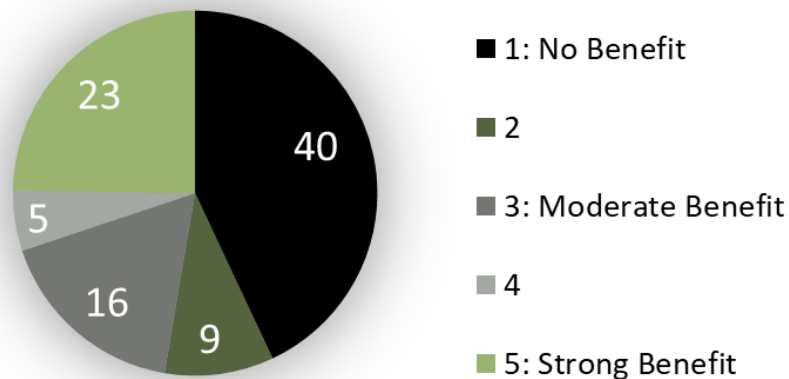
- Offered additional products beyond our current selection.
- Organized a bulk delivery to a Lincoln County location.
- Held the event earlier or later in the season, or multiple times per year, to better match planning and planting schedules.

Although there is a practical limit to the number of products that can be offered, most of the specific suggested additions are available through our suppliers and can be accommodated. We would need to grow our capacity slightly or partner with a different organization in order to provide a coastal pickup location, but that is a possibility as soon as 2023. As for timing, the current scheduling is a compromise between those who would prefer earlier or later dates. We have considered adding a late summer/early fall sale which would focus more heavily on cover crop seeds; this is also contingent on increasing our capacity, but it is a real near-term possibility.

## Current Program - Fill Your Pantry

Fill Your Pantry is a sales event for food producers who can provide large quantities of products, but don't have access to enough distribution channels to sell all of their products around harvest time. Fill Your Pantry includes an online sales phase as well as a one day market event. The intention behind the program is to help alleviate any issues producers might face with product storage and/or spoilage by getting it into people's larders and pantries. It's also a great way for producers to connect consumers with the many edible staples that are produced across the Willamette Valley and on the coast.

On a scale of 1 to 5, how much does the Fill Your Pantry market benefit your business?



Since vendor capacity is limited by the size of available rental locations, only so many producers can participate, reducing the potential benefit to local producers. Therefore, it is not surprising that only 47% of respondents rated Fill Your Pantry between 3 and 5.

Beyond what was already noted in the current programming themes section, respondents:

- **Requested a venue closer to town.**
- **Requested the event grow and increase the number of vendors**, especially for grain.
- Wanted to know ahead of time what will be for sale on the day of the event.
- Said “the event needs to attract more customers.”
- Wished there were a couple of these a year rather than only one.
- **Requested a coast pick up site.**
- Asked for a tabling section to be added for food producers to promote their businesses such as a herdshare.

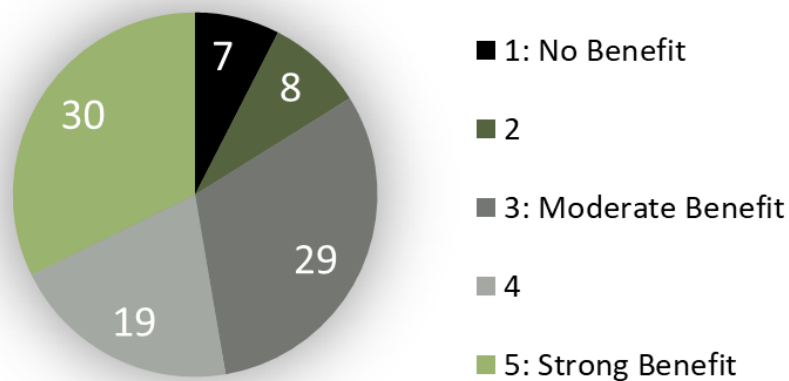
- Requested the addition of a pick-up option for pre-orders.

As already mentioned, Ten Rivers Food Web leadership supports growing this event, but would need to grow the planning committee in order to do so. For many years the event was located at the Benton County fairgrounds. At the onset of Covid-19, the fairgrounds took a hiatus from hosting events and we were fortunate to secure Peoria Gardens. Now that our community is operating close to business as usual, we will look at moving locations again. Another way to grow the event is to add a coastal pick up site as was suggested. Also of note are the many responses from producers that reflect their interests as current or potential FYP customers as well as as vendors, which indicates that in our local food system, folks play multiple roles, and we can serve food system participants in multiple capacities.

### *Proposed Program - Online Local Food Directory*

We plan to partner with other organizations in our three-county area to conduct a thorough inventory of all food producers and create an online local food directory, allowing people to easily discover local food available in their neighborhoods and communities while also building ongoing connections and communications between TRFW and food producers.

On a scale of 1 to 5, how much would an Online Food Directory benefit your business?



The Online Local Food Directory received the most positive feedback of any of our present or proposed projects, with 84% of respondents indicating a moderate to strong benefit to their food business. However, there was also concern about how “this seems to be a duplicate project. Many directories already exist for Oregon farms.” We definitely agree there are many directories out there, which is why we want to reach out to existing directories and see how we might partner with them to create a dynamic network pushing information to the community with a sense of

immediacy. Other than emphasizing the importance of stellar promotion and annual updates, respondents requested we include:

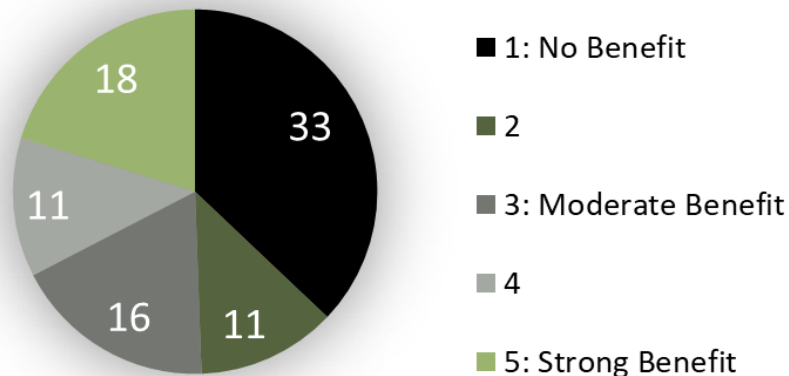
- Highlights of Black, Indigenous, and farmers of color.
- “A section about each business . . . management practices, where they source the food from if processing” etc..
- Community supported agriculture (CSAs).
- “Make it for both farmers to connect with farmers and consumers to farmers.”
  - a spot to share grafting material for specific varieties
  - a spot for equipment for sale or trade
- E-commerce and drop site info.
- Information for institutional buyers (i.e. restaurants, schools, and hospitals).

We also heard from a few producers that would appreciate such a directory because they no longer use social media and this could help them reach a similar audience. And lastly, there were a few people who do not wish to have any online presence at all.

### *Proposed Program - Big Bean Barn*

With the Big Bean Barn, we envision a large new or repurposed building that will serve as a farm-centric hub for shared equipment, crop processing/storage, other farm focused uses, and event space. Our aim is to support local growers in producing higher caloric storage crops, such as beans, grains, and flour, at a higher volume and lower price for customers by facilitating space and equipment sharing and by securing funding to reduce the cost burden on farmers.

On a scale of 1 to 5, how much would the Big Bean Barn benefit your business?



A slight majority (51%) of respondents indicated that they would receive a moderate to strong benefit from this project - similar to our existing sale events. In addition, when asked “if local infrastructure such as the Big Bean Barn existed, would you change your production to include more high-calorie staple products,” 12% said yes, 36% said maybe, and 52% said no. Our takeaway here is that we need to do more inquiry. Numbers of producers who might participate in or benefit from the project would likely change depending on which crops the Big Bean Barn supported, the location, the quality of the equipment purchased, and the cost to growers to participate.

In addition, respondents requested we include the following:

- **Capabilities/functions:** Cold storage for produce, freezer storage for meat, freeze dryer or large scale dryer, commercial kitchen for animal and food processing, a shared wash and pack facility with DEQ approved waste water handling, partner with local Tribes to support food storage of Native First Foods, a cooperative grain facility for animal producers.
- **Equipment:** Bean threshers/cleaners, community cider press, combine, lime spreading rigs, manure spreaders, “seeding equipment for smaller scale grazing operations would be a great asset to help with quality land stewardship,” what’s needed to support production of organically grown flour, drill for cover crop establishment, mobile biochar "machine," hazelnut cracking, and trailers for transporting community tools or compost.
- **Connections:** “It would be nice to have a Farmer's co-op. A local place for people to gather to share ideas and outlets for continuing to grow their farm success.” Option to consolidate purchases of mulch, drip tape, and plug trays, plus reduce shipping costs.
- **Community support:** “Have shares which would help with costs, maybe food boxes or ability to also rent equip or some such payback.”

The Big Bean Barn is still in the early stages of project development, and it is clear that the local food community has a wide range of needs that they would like to be fulfilled by this project. As we bring more producers into the planning process, we hope to be able to accommodate as many of these needs as possible, though we will inevitably have to limit the scope of the project in order for it to be financially realistic. We should also note that respondents ranked the program based on how it was written, depending upon where the scope lands support could increase or decrease.

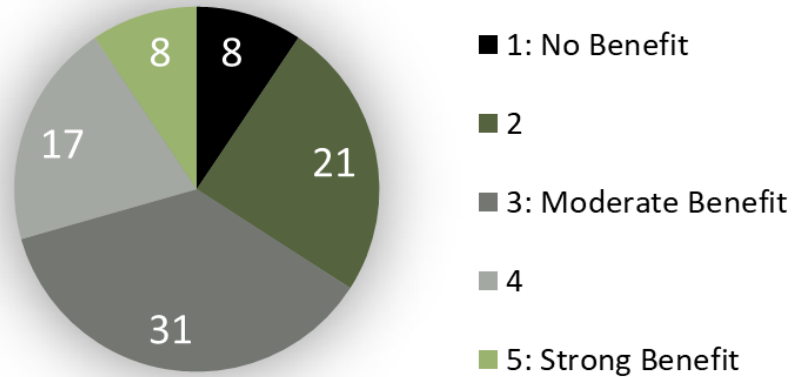
### *Proposed Program - Food Producer Advisory Committee*

The Food Producer Advisory Committee (FPAC) would create a conduit for TRFW and other organizations to 1) learn the unique needs of food producers in our service area, 2) be advised on how we can best support those food producers, 3) collect program feedback, and 4) cultivate TRFW



ambassadors in the community. The commitment would be a one-year term with meetings occurring four times per year.

On a scale of 1 to 5, how much would a Food Producer Advisory Committee benefit your business?



Two-thirds (66%) of respondents indicated that they would receive a moderate to strong benefit from a FPAC, and 58% of respondents said they would participate in or would consider participating in a pilot FPAC meeting 3 times in a year. Food producers are extremely busy folk and the fact that 49 producers would or would consider participating is staggering. We are excited to see this significant demonstration that producers in our community want to make connections and work in collaboration.

Other than a shout out to include small meat producers and seed growers, we received two entirely on point suggestions to:

- “Try to get out of the small farm bubble and reach across the aisle.”
- Establish a coastal FPAC: “Honestly the valley does not service the coast in meaningful ways and we need our own advisory committee and programming, rather than being thrown in as an afterthought.”

We wholeheartedly agree that the FPAC is just the opportunity to create a space for all producers to come together, reach beyond what’s comfortable and familiar and work to create a robust local food system fed by all shapes and sizes of producers and for all shapes and sizes of consumers. And if we prioritize establishing a coastal FPAC, we could learn the unique needs and challenges of coastal producers and determine how we can best implement any effort to meet those needs.

## *What else can we do?*

Our final question gave respondents an open-ended opportunity to share their thoughts and ideas. We asked “What could we do to support your business? Have you faced any barriers that we could address on a local level? Do you have suggestions for future projects? Or really, any other input you'd like us to hear?”

Several respondents repeated here what they already shared prior. In addition, we received a wide array of new suggestions which we organized into the following categories: advertising and sales, food producer connections, financial support, infrastructure, and technical assistance.

### *Advertising & Sales*

- Help with marketing and advertising.
- “Grow the consumer market that buys local.”
- Write and promote “a farmer feature of the month” series. Interview producers, from small to large businesses, to help the community get to know who produces their food.
- Create “an easy way to sell, especially with an online presence, e-commerce for any food producers that want to sell direct to consumers.”

### *Financial Support*

Farmers need funding for infrastructure builds. Licensing and regulatory requirements ask the moon of producers without providing much guidance or any avenues to pursue funding (beyond adding debt). We need grant funding for business development objectives.”

### *Food Producer Connections*

- Establish a farmer mentorship program - “since we are just starting out, I would like some stories, or lessons learned from other folks who have been in the production business for a while.”
- “Create a more robust community of small farmers, maybe by creating some social events where we could just hang out and talk.”
- Organize seed exchanges.
- Help “farmers share and find workers at the busiest times of year.”

### *Infrastructure*

- Sufficient, quality, educated meat processing options.

- A USDA mobile slaughter/butcher.
- A meat cooperative for sales by the cut.
- A local food aggregator in our area similar to Lane County Bounty.
- Coordinated delivery.

### *Technical Assistance*

- “One thing we have struggled with as a starting small business is figuring out all the legal and financial aspects. Making sure we have all the right insurances, coverage, labels, and record keeping.”
- Repair days/trainings.
- Information on value added product regulations.
- Grant writing so local small farms can access government funding.
- Spanish language support.

### *Conclusion*

We are very grateful to all the food producers that took the time to complete our survey. We heard resoundingly from you that we should continue to do more outreach and expand our Fill Your Pantry event and Soil Amendment Sale. We also learned that 51-84% of respondents would experience moderate to strong benefit from each of our proposed programs, which is both encouraging and exciting. As an all-volunteer organization aiming to be a connector and convener we can't do everything shared with us, but we will use this valuable feedback to guide the development of our new projects in the months and years ahead.

## Appendix I: Survey Questions

### *Ten Rivers Food Web - Current Programs*

The Soil Amendment Sale started in 1987 and for the past nine years Ten Rivers Food Web has organized it. This pre-order, bulk-purchasing event provides volume discounts to small-scale growers. Organic soil amendments, soil mixes/ingredients, cover crop seeds, pest controls and more can be pre-ordered in January for pick-up in a drive-through format in early March. The sale has experienced steady growth, distributing 100,000 lbs to 230 local farmers and gardeners in 2021. Pre-ordering is available now and until January 31st.

- On a scale of 1 to 5, how much does the Soil Amendment Sale benefit your business?
- How could the Soil Amendment Sale better serve you and your specific needs?

Fill Your Pantry is a sales event for food producers who can provide large quantities of products, but don't have access to enough distribution channels. It includes an online sales phase as well as a one day market event. Our intention is to help alleviate any issues you might face with product storage and/or spoilage by getting it into people's larders and pantries. It's a great way to connect consumers with the many edible staples that are produced across the Willamette Valley and on the coast.

- On a scale of 1 to 5, how much does the Fill Your Pantry market benefit your business?
- How could the Fill Your Pantry market better serve you and your specific needs?

### *Ten Rivers Food Web - Proposed Programs*

We plan to partner with existing directories and stakeholders to create a(n online local food) directory that includes all food producers, regardless of size or product type, as well as a dynamic social media network to ensure its robust use.

- On a scale of 1 to 5, how much would an Online Local Food Directory benefit your business?
- Do you have ideas or suggestions we should consider for this project?

The Big Bean Barn will be a large new or repurposed building that will serve as a farm-centric hub for shared equipment, crop processing/storage, and other farm focused uses, and event space. Our vision is to support local growers in producing higher caloric storage crops, such as beans, grains, and flour, at a higher volume and lower price for customers by facilitating space and equipment sharing, and securing funding to reduce the cost burden on farmers.

- On a scale of 1 to 5, how much would the Big Bean Barn benefit your business?
- If local infrastructure such as the Big Bean Barn existed, would you change your production to include more high-calorie staple products?

- Do you know of any currently under-utilized space which might house the Big Bean Barn? If so, where?
- Do you have any ideas or suggestions we should consider for this project?

The Food Producer Advisory Committee (FPAC) would create a conduit for TRFW and other organizations to 1) learn the unique needs of food producers in our service area, 2) be advised on how we can best support those food producers, 3) collect project feedback, and 4) cultivate TRFW ambassadors in the community. The commitment would be a one-year term with meetings occurring four times per year.

- On a scale of 1 to 5, how much would a Food Producer Advisory Committee benefit your business?
- Would you consider participating in a pilot FPAC that would meet 3 times this year?
- Do you have any ideas or suggestions we should consider for this project?

Ten Rivers Food Web aims to be a connector and convener in Benton, Lincoln and Linn Counties. Your experience as a producer in this food web is very valuable to us!

- What could we do to support your business? Have you faced any barriers that we could address on a local level? Do you have suggestions for future projects? Or really, any other input you'd like us to hear?

### *Food Business Demographics*

- What is the name of your food business?
- What do you raise, grow, catch, or produce?
- What county is your business located in?
- How long have you been a food producer?
- Approximately what percentage of your food production income comes from each of the following market channels?
- How many people do you employ part or full-time (not including yourself)?
- What makes up your income (approximately)?
- Approximately what percent of your sales are made within Benton, Lincoln, and Linn Counties?
- Has your business been impacted by recent extreme weather? Check all that apply.

### *Gender and Ethnicity Demographics*

- Which categories best describe you?
- What is your current gender identity?