YORK AND SOUTHERN OXFORD COUNTY FARMERS SURVEY SUMMARY

September 2016

Kathy Connor & Megan McLaughlin,

Southern Maine Planning and Development Commission

for The York County Farmers Network

Introduction

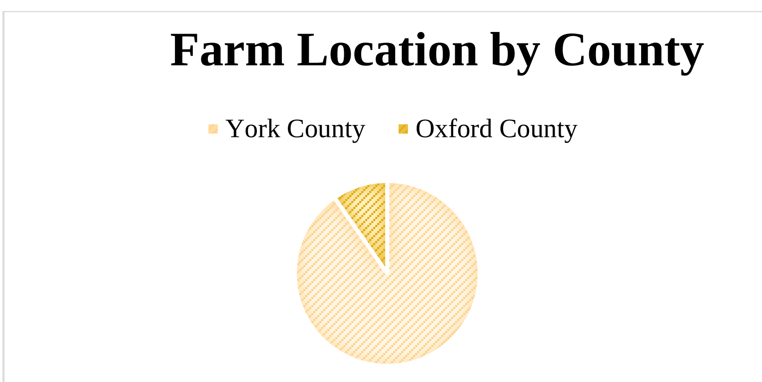
The project that this summary represents is a portion of a larger joint effort between the York County Farmers Network (YCFN) and the Southern Maine Planning and Development Commission (SMPDC) to utilize a USDA Local Food Promotion Program grant to investigate the possibility of establishing a food hub in York County, Maine. The first step in investigating this possibility was surveying the farmers and producers in York and southern Oxford Counties. YCFN Steering Committee members assisted SMPDC in developing the survey. The intent of the survey was to get information on the type and availability of products/produce, how farmers are marketing their products, types of services, marketing ideas, and market access actions that are important to farmers, types of barriers faced to expanding farming practice, and how products are advertised. Over 350 surveys were sent out with a response rate of about 19%. The results obtained from this survey will serve to assist in evaluating the utility of a food hub in York County. SMPDC has provided this document to YCFN to summarize the results of the farmers' survey.

Analysis of Survey Responses

There were 22 questions in the survey "*York County Food Hub Feasibility Study – Survey for Farmers/Producers*" which SMPDC has developed graphics and provided analysis for. All survey questions are represented through the sections below – in some cases, more than one survey question comprises a section.

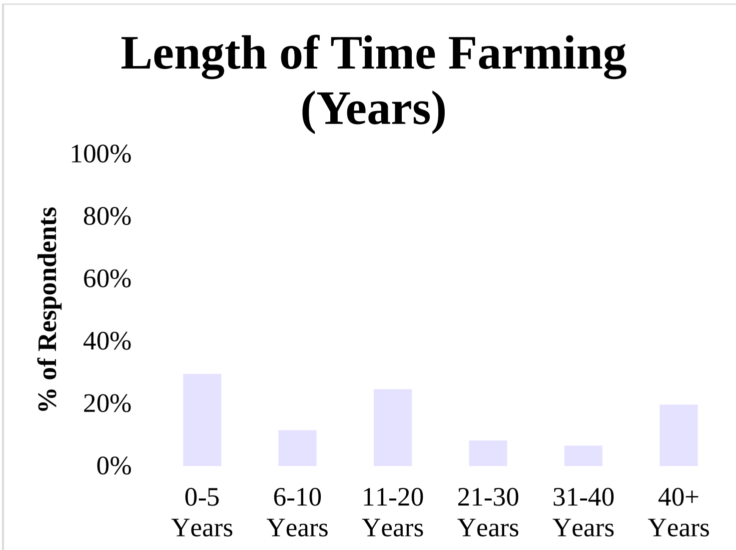
Section 1

Most of the farmers (90%) surveyed were from York County while 10% of the farmers were from Oxford County. These numbers reflect the fact that York County's farmers created the York County Farmers Network with assistance from the York County Cooperative Extension which maintains membership data so that the survey could easily be sent via email to York County farmers. Oxford County does not yet have this advantage. The Oxford County Cooperative Extension assisted the effort by publishing information on the study and a link to the survey on their Facebook page.



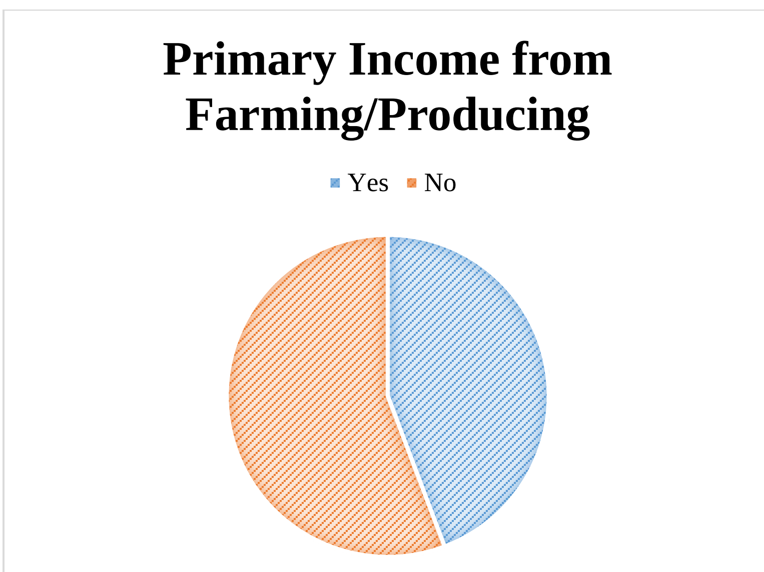
Section 2

Over 29% of farmers who responded indicated that they've been farming for 5 years or less while a quarter of farmers surveyed have been farming for between 11 and 20 years. Nearly 20% of farmers surveyed have been farming for over 40 years. York and southern Oxford County farmers overall tend to have some experience but there is a significant contingent of beginning farmers coming into the ranks.



Section 3

44% of respondents indicated that their primary income comes from farming while 56% of respondents do not depend on farming for their primary income. It is not unusual for farming families to supplement with a job off the farm which can also provide medical benefits.

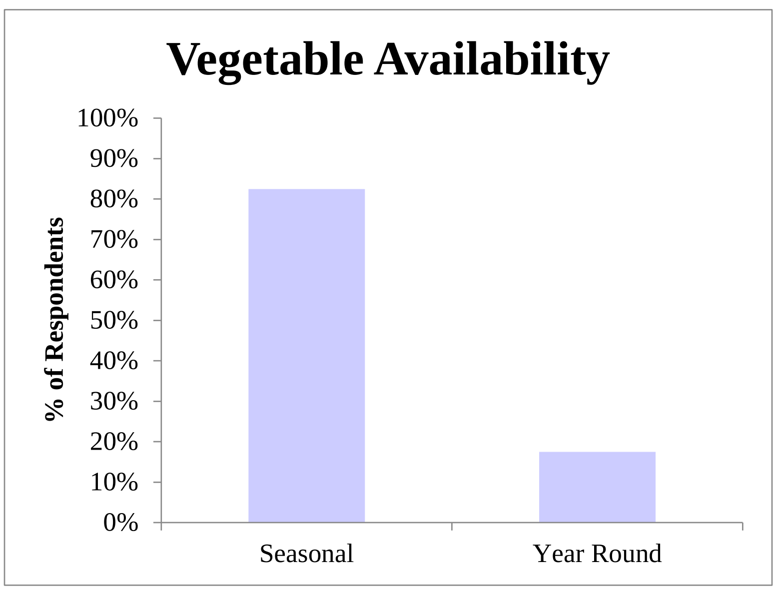


Section 4

A large majority of respondents indicated that they grow seasonal vegetables. Interestingly, 18% of respondents indicated that they grow vegetables year round. Although not depicted on the graph, 15% also indicated that they sell organic vegetables. Among the vegetables listed as being grown in the survey were: salad and cooking greens, carrots, sweet potatoes, tomatoes, zucchini, onions, beets, peas, beans, root vegetables, squash, garlic, peppers, radishes, parsnips, sweet corn, and potatoes. Herbs, flowers, seedlings and mushrooms were also listed.

In terms of fruit, 31% of respondents indicated that they grow blueberries and raspberries, 10% of respondents indicated that they harvest apples in the fall, and 8% of respondents indicated that they grow peaches and plums and harvest in the late summer/early fall. Other products and their availability are shown in the table below.

In terms of livestock and poultry, 25% of respondents indicated that they raise poultry for availability in the summer and fall. 19% of respondents indicated that they have pork available in the spring and fall and 19% of respondents indicated that they have beef for sale in the fall. Goats and goat products (9%) were also mentioned as well as lamb available in the fall (6%), and venison and rabbits year round (6%). The farmers surveyed grow a diversity of produce and many farms are producing vegetables and raising animals for meat.

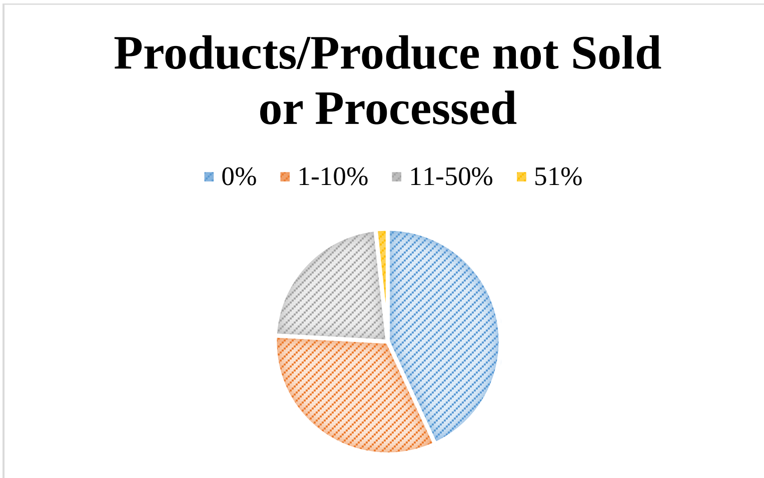


Fruits & Other		
Product	*Responses (%)*	*Availability*
Blueberries & Raspberries	31.25%	July-Early September, July respectively
Perennials/Flowers/Seedlings	20.83%	Spring/Summer/Fall
Apples	10.42%	Fall
Eggs	12.50%	-
Peaches & Plums	8.33%	August-September
Honey	4.17%	Fall
Small Fruit	2.08%	-
Melons	2.08%	-
Processed Foods: Apple Products, Syrup	8.33%	

Livestock/Poultry		
Product	*Responses (%)*	*Typical Availability*
Poultry	25%	Summer/Fall
Pork	18.75%	Spring/Fall
Beef	18.75%	Fall
Other	12.5%	-
Goat/Goat Products	9.38%	-
Lamb	6.25%	Fall
Other Livestock	6.25%	Year Round

Section 5

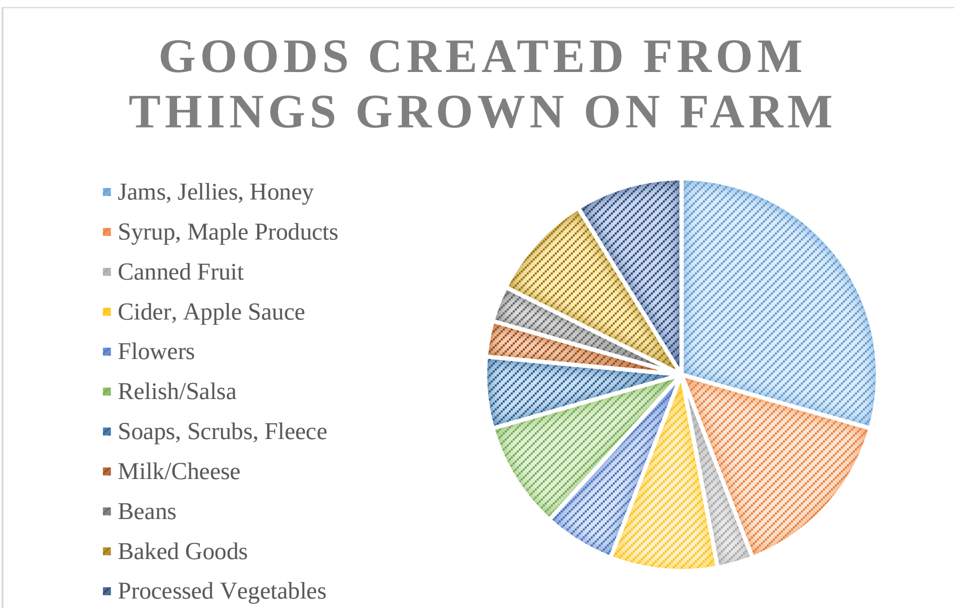
44% of respondents use (sell or process) all the products/produce that they grow/raise. Only about 2% of respondents said greater than 51% of products/produced were unused. Some farms donate excess produce or plant crops specifically for donation through programs like Maine Harvest for Hunger.



Section 6

Many farms are selling value-added goods (foods that are processed in some way). The pie chart below shows the products that respondents indicated that they make, at least in part, from products grown on their farm. Since most respondents did not indicate the percentage of their products that is locally grown, the data was split into the pie chart for those that did not indicate and the table for those that did indicate percentages. The table following lists what value-added products respondents create on their farm and the percent of the ingredients in these value-added products that are local. This table will differ as explained above from the pie chart because it only includes responses that indicated the percentage of each product made locally.

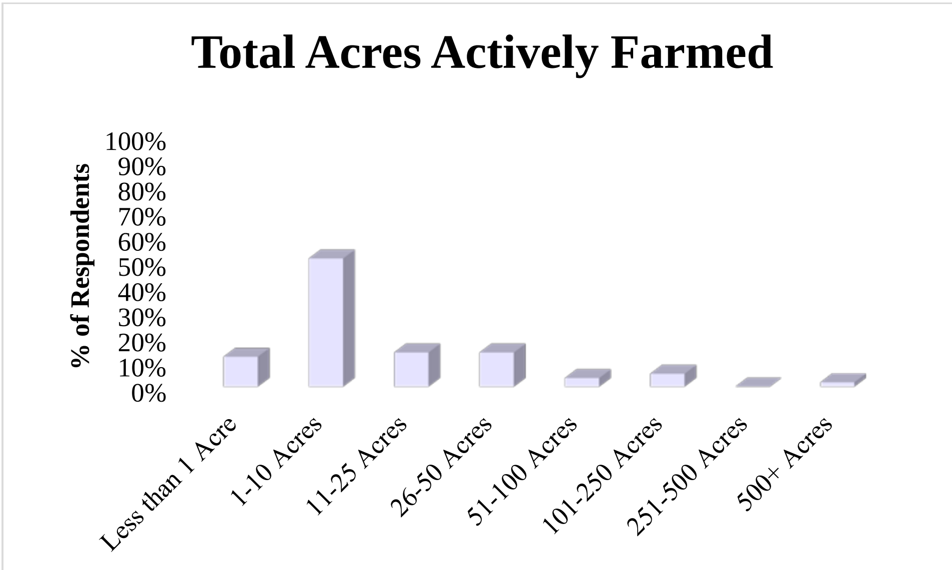
Based on the responses provided as shown in the graph and the table, some farms are producing jams, jellies and honey (10 farms) and two indicated that their products are 100% locally produced. In addition, a few farms are producing syrup and maple products (4 farms) and these tend to be 100% local (2 responses) with the exception of maple sugar candy, maple cream and maple coated nuts. Lastly, farms are producing cider and products from apples such as apple sauce (3 farms), 2 of the respondents indicated that these products are 100% local.



Product	*# of Responses*	*% Local*
Apple Sauce & Cider	2	100%
Peeled Squash	1	100%
Whole Wheat Bread Zucchini Bread, Muffins	3	90-98%, 75% and 50% for muffins
Dried Wild Mushrooms	1	100%
Goat Milk, Goat Milk Cheese and Yogurt	2	100%
Honey	1	100%
Fruits (Canned), Jams & Jellies	3	100%
Maple Syrup & Maple Products (Candy, Cream & Nuts)	3	100%, 10%, 10%, 5% respectively
Relish	2	100%
Pickles, Dilly Beans	2	75%, 90% respectively
Roasted Tomatoes & Tomato Jam	2	100%

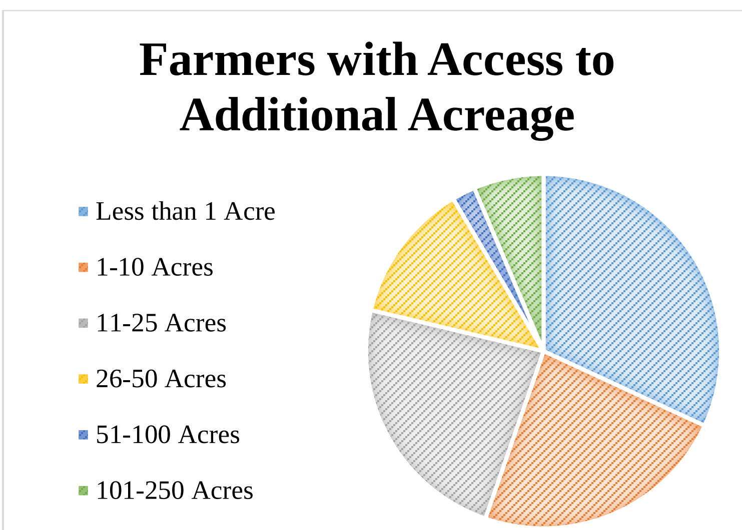
Section 7

Half of respondents (nearly 51%) actively farm between 1 and 10 acres. A large majority of respondents (88%) farm less than 50 acres. One respondent indicated that they farm over 500 acres. As seems to be the case state-wide, farms in the study area tend to be small.



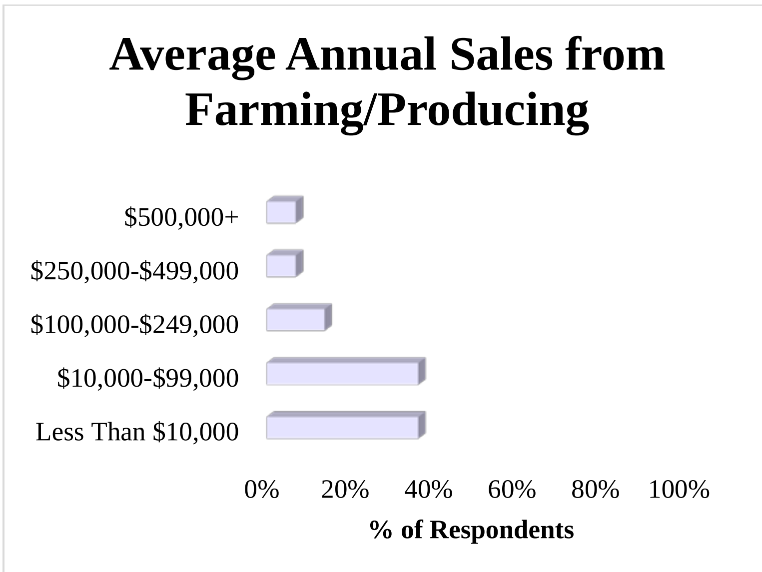
Section 8

Almost a third of respondents (32%) indicate that they cannot farm any additional acreage or have access to very little additional land while 46% of respondents indicated that they could potentially farm from 1 to 25 additional acres and an additional 13% could farm 26 to 50 more acres. One farmer reported having access to potentially farm 250 additional acres.



Section 9

Farms reporting sales of less than $10,000 and sales of between $10,000 and $99,000 are the largest categories at approximately 36% each. The remaining 28% of farmers reported sales of $100,000 or greater. In an earlier section, 44% of the respondents indicated that their primary income comes from farming. In the 2012 Agricultural Census, 33% of farmers in York County indicated that their principal occupation is farming. This is a significant difference that might be accounted for in a couple ways: more new farms in the past few years and/or some farmers may have worked off the farm but have now begun to focus on farming exclusively for income.

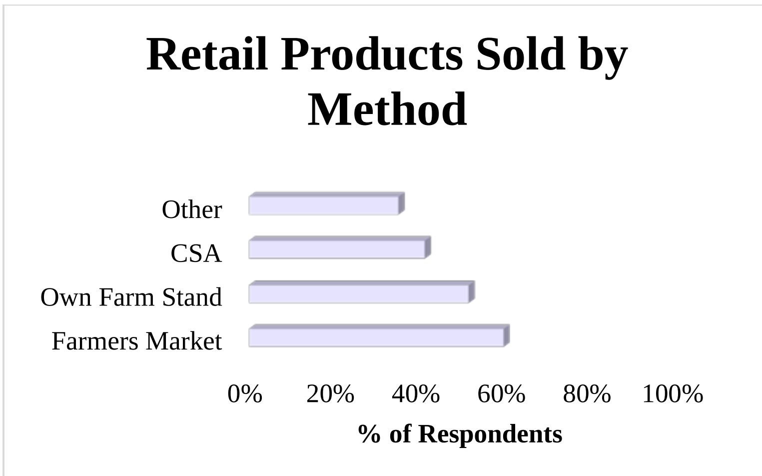


Section 10

A majority of respondents indicated that they sell their produce/products retail (64%) while over a third (35%) indicated they sell wholesale. About 1% indicated "other" which included a new farmer not yet selling at the time of the survey. It is important to keep in mind that some farms sell both retail and wholesale. Retail sales includes include pick your own, CSA, farmstand and private sales.

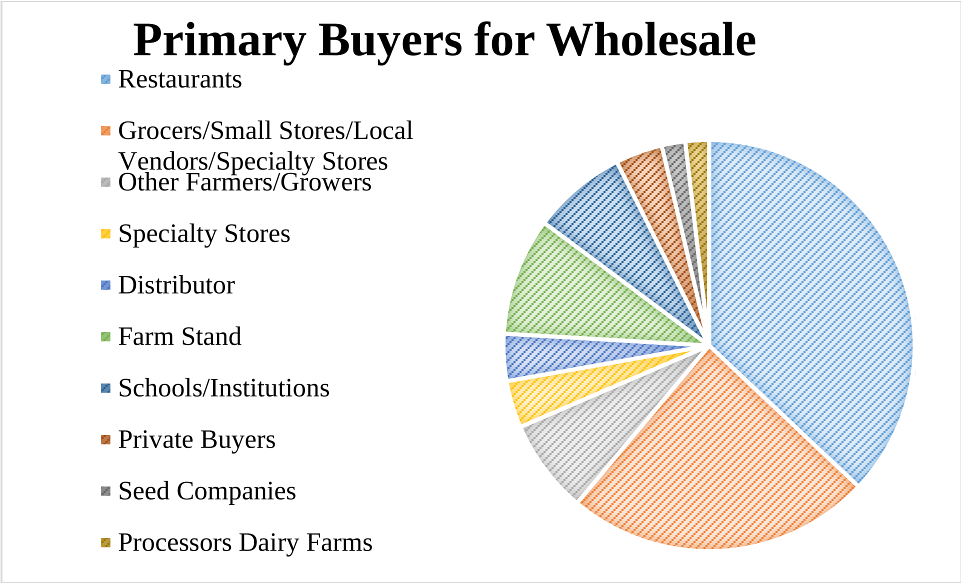
Section 11

A sizable majority (59%) of respondents indicate that they sell retail products through farmers markets. However, 51% of respondents also indicated they sell through their own farm stand and 40% of respondents indicated that they run Community Supported Agriculture (CSAs). Obviously many farmers are using several ways to sell their products directly to consumers. The Other responses included word of mouth retail sales, sales from the farm directly via ordering and pick our own.



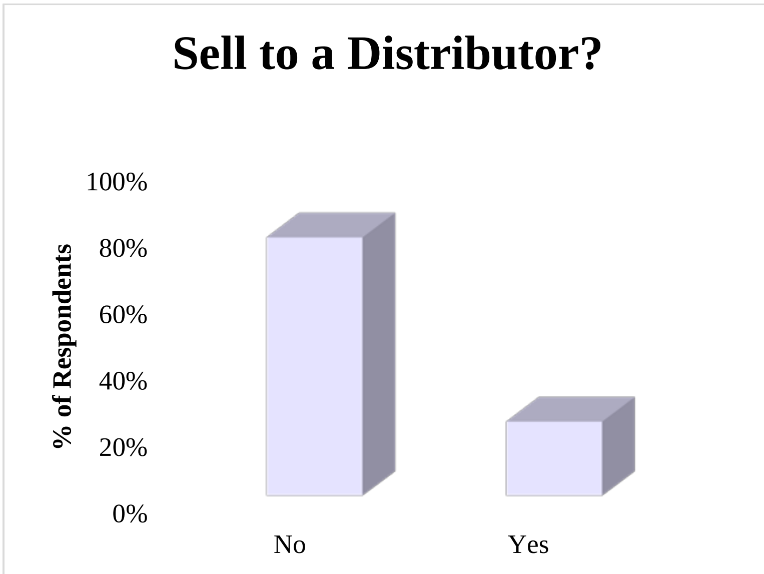
Section 12

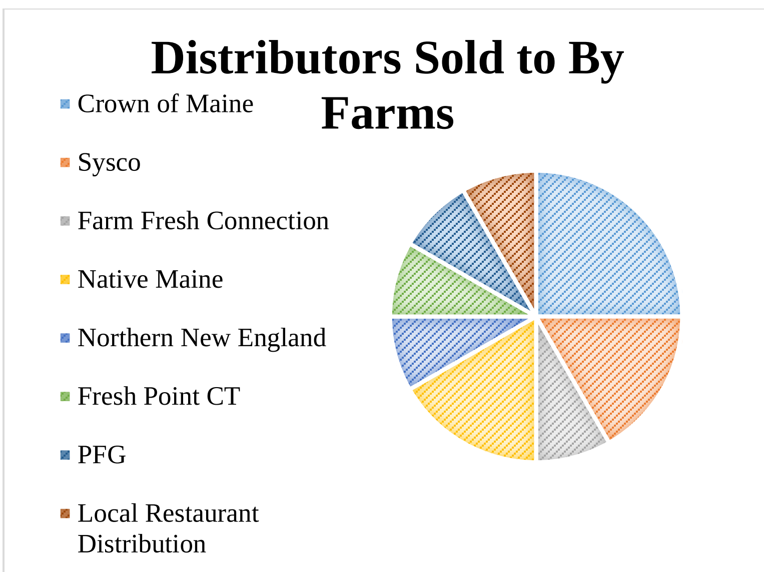
The largest contingent of respondents (35%) indicated that their primary wholesale buyers are restaurants. However, 24% of respondents indicated that they sell to the grocery sector with 10% selling to either Hannaford or Whole Foods. Other respondents indicated that they sell to farm stands and other farmers/growers. Crown O' Maine and Native Maine were both mentioned as distributors that some farmers sell to.



Section 13

A large majority of respondents (86%) indicated that they do not sell to a distributor, however, of those farmers who do sell to distributors, 9% indicated that they sell to either Sysco or Native Maine and nearly 7% indicated that they sell to Crown O' Maine.





Section 14

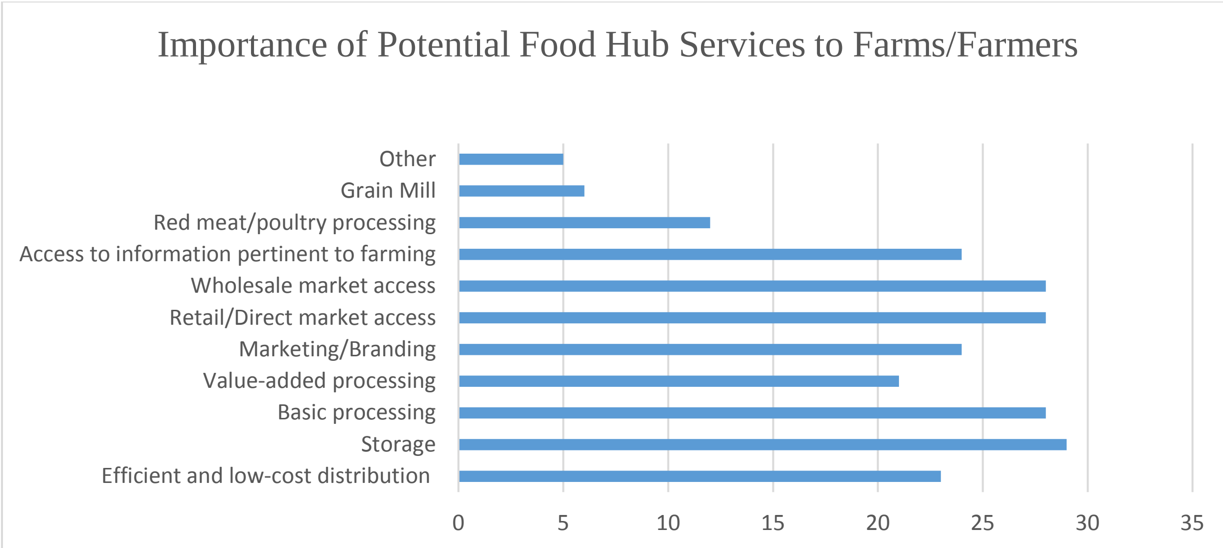
The following possible food hub services were offered with farmers asked to rank them in order of potential importance to their farm.

- Storage (Of any kind)
- Basic Processing (Washing, Bundling, Packaging)
- Retail/Direct Market Access
- Wholesale Market Access (Such as restaurants, grocery stores, and institutions like schools)
- Efficient and Low Cost Distribution Strategies
- Marketing/Branding
- Access to Information Pertinent to Farming or Running a Business (technical assistance, financial management, workshops, classes, or business counseling)
- Value-Added Processing (Such as would be done in a commercial kitchen)
- Red Meat/Poultry Processing
- Grain Mill
- Other (the farmers were asked to describe what additional service they would want)

The data for this question was compiled by looking at the number of responses across the choices and focusing on the top five. It is important to note that some respondents did not finish answering the question (perhaps too many choices) and may not have included their top 5 choices in what they submitted. 9% of the farmers who took the survey skipped this question altogether.

The respondents chose storage (of any kind) as the number one service in terms of importance to their farms with 29 votes in the top 5. The second, third, and fourth services were all tied with 28 votes and included basic processing (washing, bundling, packaging), retail/direct market access, and wholesale market access (such as restaurants, grocery stores, and institutions like schools). The fifth service with 24 votes was a tie between marketing/branding and access to information pertinent to farming or running a business (technical assistance, financial management, workshops, classes, or business counseling). There is significant diversity among respondents in terms of what they would like to see in a food hub although many of the top-rated potential food hub services are fairly typical of what food hubs across the country offer to farmer-members.

The two lowest ranked services were red meat/poultry processing and a grain mill.



The survey also asked if there was another service not among the choices that would be useful to the farmers. Nine respondents provided additional services they'd like to have access to. Two farmers wanted another outlet for excess crops, including places to donate to. The rest of the answers were far-ranging as shown in the table below.

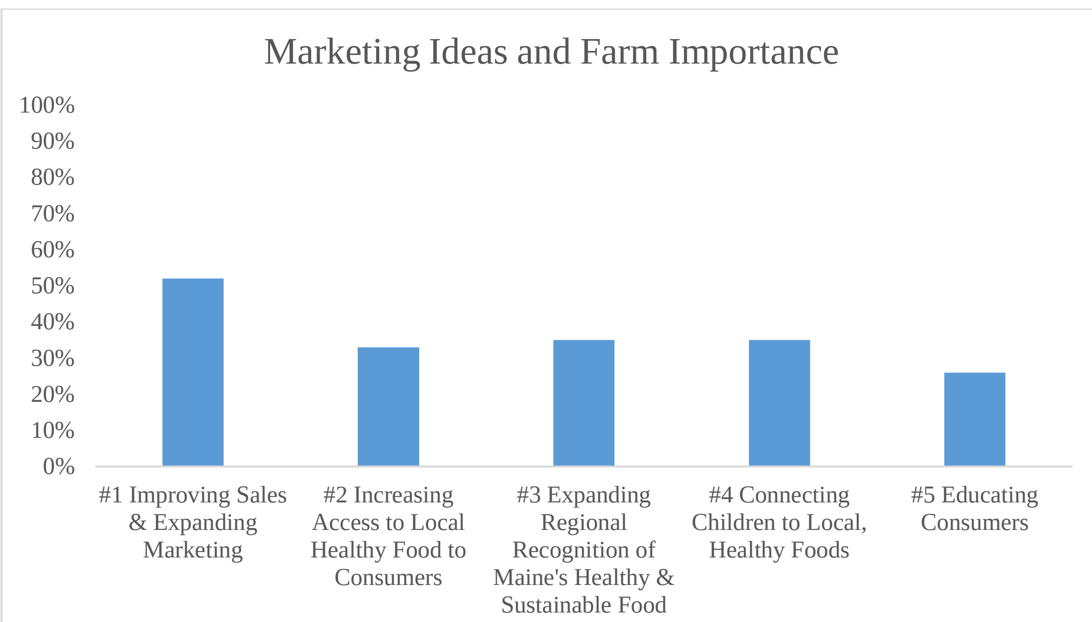
"Other" Services	*# of Responses*
Place for Excess Crops	2
Wood	1
Securing Long-Term Land Tenure	1
Certified Organic Poultry/Pork Processing	1
Restaurant Supplier	1
Help with State Regulations & Licensing	1
Help with Grants	1
Livestock Welfare/Well-being	1

Section 15

The marketing ideas below were ranked by the respondents in order of importance to the farmer and their farm. As can be seen in the graph, many farmers in York County are interested in expanding the market for their products but they also have interest in the other choices as shown by the tight percentages across the board. The greatest percentage of respondents that selected each ranking is shown below.

1. Improving Sales & Expanding Marketing to New Buyers (52% of respondents chose this as their first choice)
2. Increasing Access to Local Healthy Food to Consumers (33% of respondents chose this as their second choice)
3. Expanding Regional Recognition of Maine's Healthy/Authentic/Sustainable Food (35% of respondents chose this as their third choice)
4. Connecting Children to Local Healthy Foods through Consumption and Education (35% of respondents chose this as their fourth choice)
5. Educating Consumers (How to Eat Healthy or Best Utilize Locally Processed Foods e.g. Cooking Classes, Recipe Access) (26% of respondents ranked this as their fifth choice)

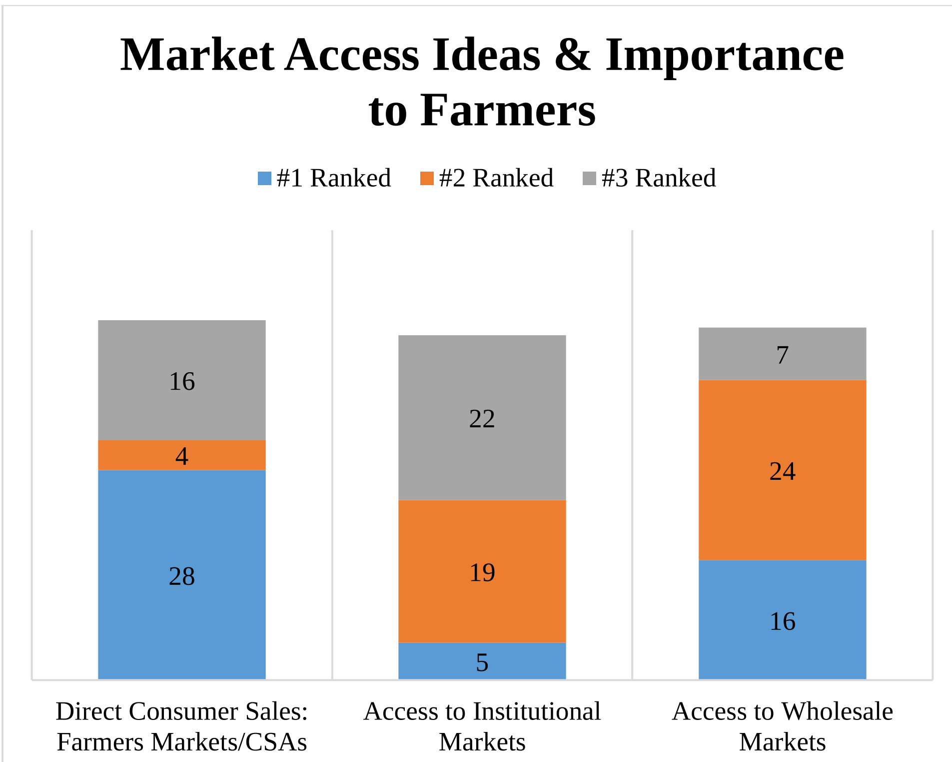
The bar chart below shows the percentage of respondents that chose each marketing idea as number one, number two, etc.



Section 16

The following market access ideas were ranked in order of importance to the respondent and their farm with 1 being the most important and 3 the least important. The ideas are shown as ranked by the respondents.

1. Direct Consumer Sales: Farmers Markets/CSAs (45% or 28 respondents ranked this first)
2. Access to Wholesale Markets like Restaurants and Grocery Stores (38% or 24 respondents ranked this second)
3. Access to Institutional Markets (17% or 22 respondents ranked this third)

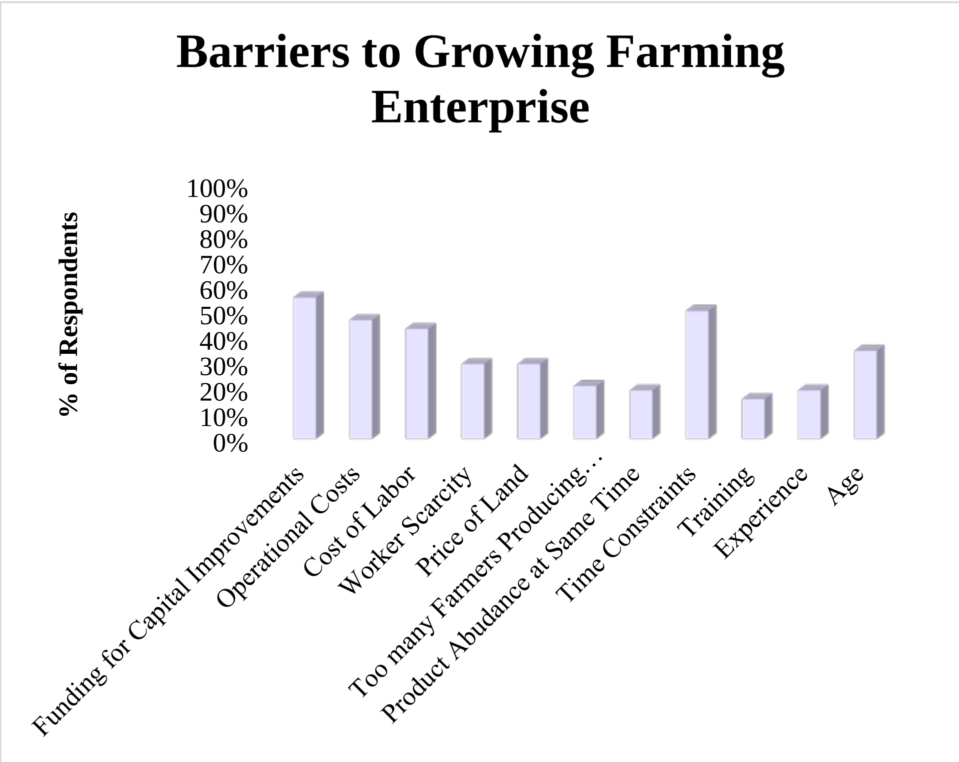


It is not surprising that farmers want most to expand direct consumer sales as this is how many farms are currently operating and what some farmers enjoy when doing business, e.g. relationships with consumers. It is worth pointing out that many farmers are also quite interested in wholesale markets – and these markets are often what food hubs can assist farmers the most with. Institutional markets are a type of wholesale market but focus on schools, hospitals, long-term care and assisted living facilities which have a different approach to purchasing than other wholesale markets like grocery stores and restaurants.

Section 17

A majority of respondents (55%) indicated that funding for capital improvements is the biggest barrier to growing their farming enterprise. Respondents were allowed to choose as many constraints as they thought applied so 50% of respondents also chose time constraints, 47% said operational costs and 43% chose the cost of labor. Therefore, the top five barriers to farmers growing their farming enterprise are as follows:

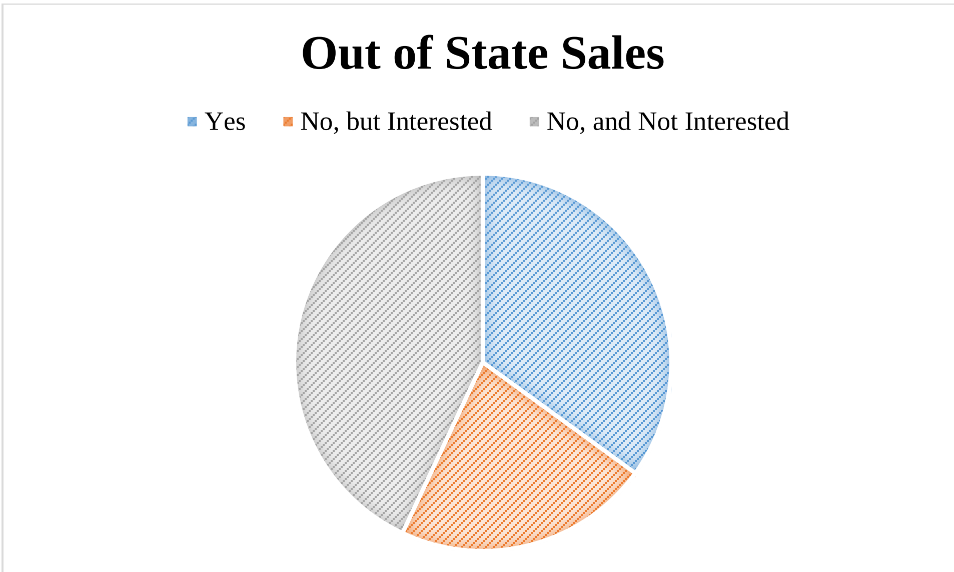
1. Funding for Capital Improvements
2. Time Constraints
3. Operational Costs
4. Cost of Labor
5. Age



The top five choices include constraints that a food hub may be able to assist farmers with, particularly time constraints, operational costs and the cost of labor. A food hub could offer services that take some of the burden of marketing, delivery and temperature-controlled storing of produce off the individual farmers which may address those constraints to some degree.

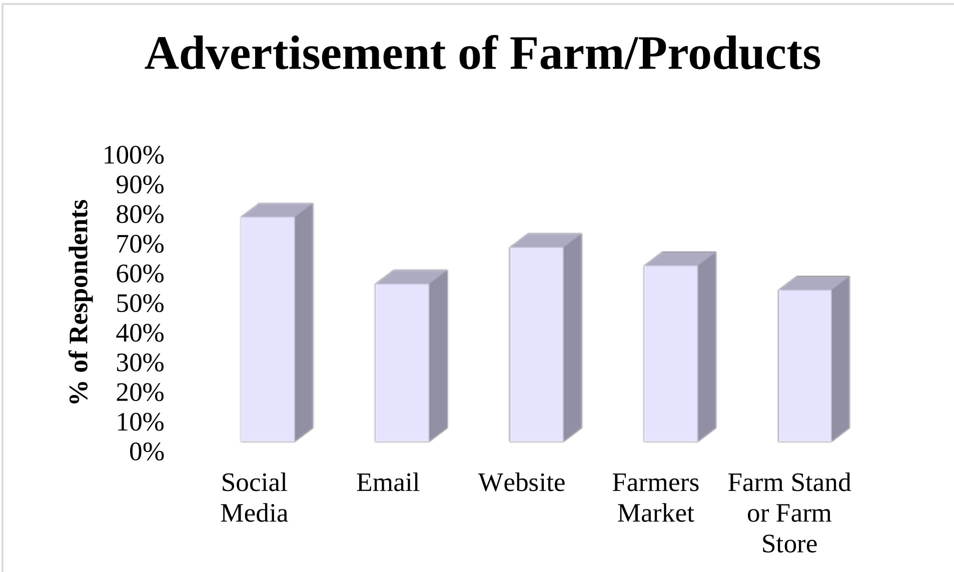
Section 18

Many respondents (43%) indicate that they do not sell out of state and are not interested in selling out of state. This may be because the marketing burden and time constraints do not make it worthwhile to pursue. Over a third of respondents indicate that they currently sell out of state and 20% of respondents indicate that they do not sell out of state but are interested in doing so.



Section 19

Three-quarters of respondents (76%) indicate that they advertise their farm/products on social media, while 65% of respondents indicate that they advertise on a website, 59% of respondents advertise through farmer's markets, 53% of respondents advertise through email and 51% of respondents advertise through a farm stand or a farm store. Farmers are clearly using technology in a number of different ways to sell their products.



Section 20

The survey asked respondents to comment further if they wished to. Several of the comments expressed support of the idea of a food hub. Several comments were cautionary (concerns about "stepping on toes" of existing businesses and concerns about how a food hub might negatively impact small farms) and some offered advice. Several respondents were contacted directly for further conversations.

Other Findings from the Survey:

The average size of farms in York and southern Oxford County, based on respondent's answers to the question asking how much land they farm is 32.38 acres. Because a few respondents indicated they farm hundreds of acres, this average is probably skewed somewhat upward. In general, though, York and southern Oxford County farms do tend to be small farms.

SMPDC was interested to see that comparing the smallest farm to the largest farm as represented through the survey reveals that both farms share some constraints in common. Both cite operational costs and too much of a given product available at the same time as barriers to their businesses.

Largest vs. Smallest Farm – Highlights from Survey Responses		
	Largest Farm	**Smallest Farm**
Size (Acreage)	600 Acres	1/3 of an Acre
Size (Annual Sales)	$500,000+	$10,000-$99,000
What do They Grow?	Potatoes: August-October, Grain Corn and Sweet Corn: July-August	Vegetables, Berries and Flowers Grown Organically
Where do They Sell?	Wholesale to Processors, Dairy Farms and Out of State Sales	Retail and Wholesale Utilizing a Farmers Market and Their Own Farm Stand (CSAs). Wholesale to Local Restaurants and the Grocery Market
What are Some of the Barriers That They Face?	Operational Costs, Cost of Labor, Too Much of a Given Product Available at the Same Time	Operational Costs, Too Many Farmers Producing the Same Products, Too Much of a Given Product Available at the Same Time, Rental Land Access