WA Farm COVID-19 Survey Early Results: Examining 2020 & Planning for 2021

Farm-to-Table Trade Meeting
Market Trends in Response to COVID-19
February 23rd 2021

Acknowledgement:
Farmers who participated anonymously in the survey
Individuals and organizations who provided feedback and helped to disseminate the survey

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Purpose

► How have farms in WA been impacted by COVID-19?

► How can detailed information about farms’ 2020 experience help to:
  ► Inform recovery efforts
  ► Build resilience to future challenges
General Survey & Farm Characteristics
General Characteristics

- Survey was available 12/1/20 – 1/31/21
- Received 265 complete responses from 33 counties
- Highest response density from King County and other Puget Sound counties, but reasonable statewide coverage as well
Farm Types

- Highest numbers of responses from vegetable, fruit, and meat/egg producers
- Over 75% of farms surveyed produced more than one category of product
Farm Types

Farm Acreage (actively farmed)
- 1 - 9 acres: 45%
- 10 - 49 acres: 23%
- 50 - 170 acres: 11%
- 180 - 499 acres: 7%
- 500 - 999 acres: 3%
- 1000 - 1999 acres: 3%
- 2000+ acres: 6%
- No response: 3%

Gross Annual Revenue (2019)
- $<250K: 70%
- $>250K: 21%
- No response: 9%

- Majority smaller farms
- Some farms at all scales
Years in Operation

- Mix of beginning and experienced farmers
- 40% of respondents had been in operation >20 years
- Small farm ≠ beginning farm
COVID-19 Impacts & Experiences
Overall Impact

Overall Impact of COVID-19 on Business

- 60% Negatively impacted
- 30% Positively impacted

>75% Local/Regional Marketing
- 54% Negatively impacted
- 38% Positively impacted

>75% Natl/Internatnl Marketing
- 82% Negatively impacted
- 9% Positively impacted
Trends in Sales Channels

Channels **stopped** most frequently:
- Farmers markets
- Direct to restaurant

Channels **started** most frequently:
- Direct to consumer
- Food hub

Nearly 30% of farms **started** at least one new sales channel in 2020 compared to 2019
Trends in Sales Channels

Of those farms that sold through a given channel in either year, how did the amount of revenue attributable to that channel change in 2020 compared to 2019?

“I stopped selling at farmers markets altogether”

“CSA and local farmers market sales tripled or quadrupled”

*Small sample size
Expansion of Farm Business Networks

**Have you established new working relationships as a result of COVID-19 and related disruptions?**

- With other farms: 18%
- With other agribusiness: 11%
- With collaborative networks: 18% (e.g. co-ops, food hubs)

“**Our neighbors contacted us to ask if we needed their help to plant**”

“**More like-minded producers to coordinate transportation and processing**”

“**I joined with another farmer running an online marketplace**”

“**Zooming at night brought folks together not just to talk shop but to talk ... generated sharing ideas**”

“**Food processing with local restaurants**”

“**Worked with [a] group of local farmers to create a cooperative food hub**”
Looking to the Future
Concerns for 2021

Top concerns for 2021:
- Capacity of processors
- Unforeseen expenses
- Market uncertainty
- Disruptions to input supply chain
Preparedness to Adapt

How confident are you of being able adapt to COVID-19-related challenges that may arise in 2021 based on your farm’s...

Financial Capacity

- Very confident: 15%
- Somewhat confident: 54%
- Not very confident: 19%
- Not at all confident: 9%
- No response: 3%

Personal / Network / Human Capacity

- Very confident: 26%
- Somewhat confident: 57%
- Not very confident: 10%
- Not at all confident: 3%
- No response: 4%

“Had to spend a lot of time increasing and expanding online presence. Hoping this will help into next year”

“Stoicism helped the most”
More Coming Soon...

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Project website: https://nutr.uw.edu/cphn/wafarm