



ASSESSMENT OF TETON VIEW AGRICULTURE FOR LOCAL AND REGIONAL MARKETS

High Country Resource Conservation & Development Area, Inc.

Revised with ADDENDUM March 30, 2015



University of Idaho
College of Agricultural and Life Sciences

Addendum to the Assessment of Teton View Agriculture for Local and Regional Markets: Acres in Cropland and Rangeland

This addendum has been added to respond to a question received after review regarding the total number of acres in cropland and rangeland, including federal and state grazing allotments. Figure 93 reports data specific to private lands and Figures 94 and 95 report data specific to public lands.

Figure 93. Land in farms, by type (acres) and county¹

	Fremont	Madison	Teton, ID	Teton, WY	STUDY REGION
Total land area	1,192,658	300,298	287,651	2,557,044	4,337,651
Total land area in farms	316,332	201,372	133,199	40,160	691,063
% of county's/region's land area in farms	26.5	67.1	46.3	1.6	15.9
Total cropland	207,777	167,384	87,600	10,545	473,306
Harvested cropland	172,151	139,021	60,946	8,015	380,133
Other pasture and grazing land that could have been used for crops without additional improvements	1,876	1,521	9,912	NA	NA
Other cropland	33,750	26,842	16,742	NA	NA
Cropland idle or used for cover crops or soil improvement, but not harvested and not pastured or grazed	32,252	23,571	13,020	NA	NA
Cropland on which all crops failed	509	280	1,038	230	2,057
Cropland in cultivated summer fallow	989	2,991	2,684	NA	NA
Total woodland	8,166	4,266	12,151	NA	NA
Woodland pastured	3,611	1,196	2,947	NA	NA
Woodland not pastured	4,555	3,070	9,204	NA	NA
Permanent pasture and rangeland, other than cropland and woodland pastured	88,090	22,015	28,802	25,613	164,520
Land in farmsteads, homes, buildings, livestock facilities, ponds, roads, wasteland, etc	12,299	7,707	4,646	NA	NA
Pastureland, all types	93,577	24,732	41,661	28,180	188,150

SOURCE: USDA

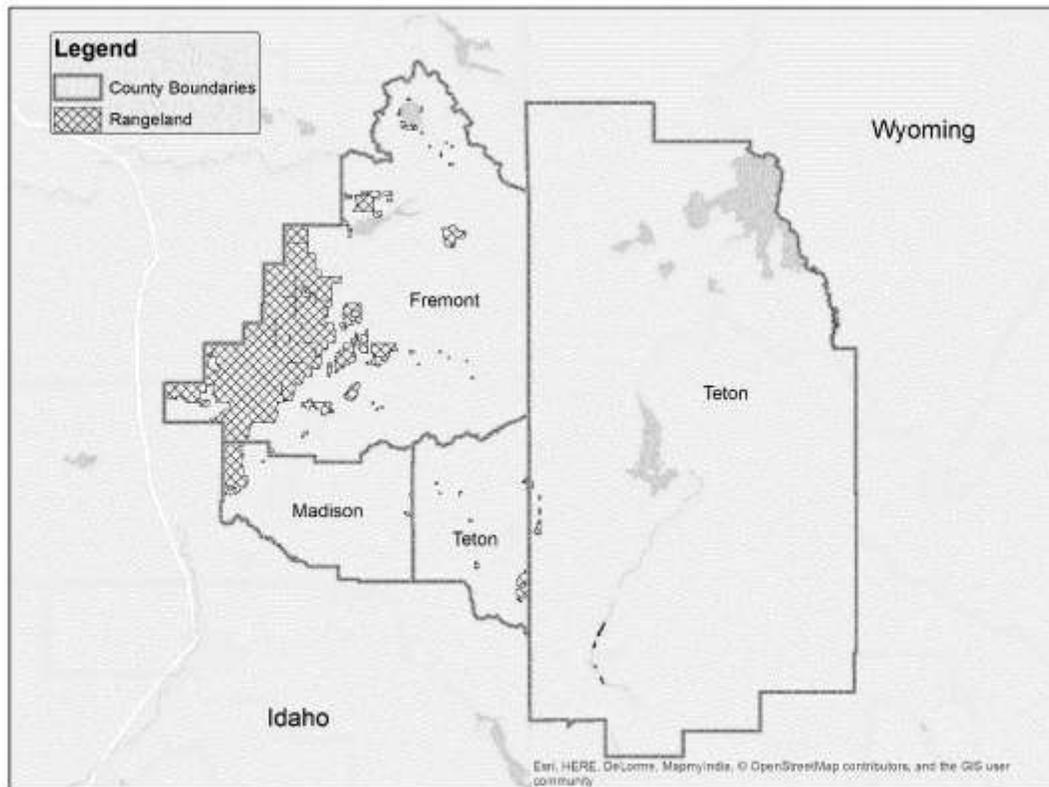
¹ Page 13 of the "General Explanation and Census of Agriculture Report Form" defines 'land in farms' as acreage that "consists primarily of agricultural land used for crops, pasture, or grazing. It also includes woodland and wasteland not actually under cultivation or used for pasture or grazing, provided it was part of the farm operator's total operation. Large acreages of woodland or wasteland held for nonagricultural purposes were deleted from individual reports during the edit process. Land in farms includes CRP, WRP, FWP, and CREP acres. Land in farms is an operating unit concept and includes land owned and operated as well as land rented from others. Land used rent free was reported as land rented from others. All grazing land, except land used under government permits on a per-head basis, was included as 'land in farms' provided it was part of a farm or ranch. Land under the exclusive use of a grazing association was reported by the grazing association and included as land in farms." See http://www.agcensus.usda.gov/Publications/2012/Full_Report/Volume_1,_Chapter_1_State_Level/Idaho/idappxb.pdf

Figure 94. Public land in grazing (acres), by county²

Fremont	Madison	Teton, ID	Teton, WY	STUDY REGION
147,544	28,882	4,352	2,196	182,974

SOURCE: Rangeland Administration System

Figure 95. Map of public lands in grazing, by county



SOURCE: Rangeland Administration System

Addendum Acknowledgements

Several people helped us answer the question of how many acres by ownership type and county are in rangeland in the Teton View study area. We wish to thank Bruce Godfrey, GIS Specialist at the University of Idaho Library, for his help locating and mapping data. We also appreciate the guidance we received from Karen Launchbaugh, UI Rangeland Center Director, and Vincent Jansen, UI Geography Department doctoral student. Bret Herres, Bureau of Land Management Rangeland Management Specialist at the Upper Snake Field Office, queried and sent us public lands data from the Rangeland Administration System.

² Bureau of Land Management allotment-specific geospatial data is available at <http://www.geocommunicator.gov/blmMap/Map.jsp?MAP=GA>



A team from the Office of Grant and Project Development (OGPD) in the College of Agricultural and Life Sciences at the University of Idaho collaborated with the High Country Resource Conservation and Development (RC&D) Area Inc. and the project advisory committee to conduct the assessment. University of Idaho’s Institutional Review Board certified this research as exempt. The OGPD team included the following members:

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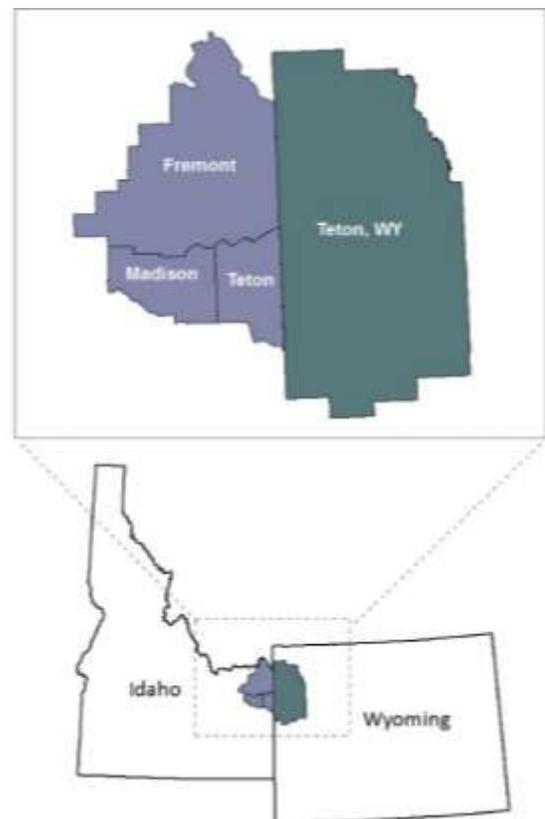
This project assessed the potential for developing local and regional agricultural production, processing, and marketing in Teton, Fremont, and Madison counties in Idaho and Teton County in Wyoming (Figure 1). This assessment tiers to a much larger US Housing and Urban Development (HUD)-funded project to develop a regional plan for sustainable development in the study area. The assessment’s goal is to provide the resources and materials necessary to integrate local foods production into the regional plan. The project included the following objectives:

- ◆ Analyze available preexisting (i.e., secondary) data to characterize potential local supply and demand for agricultural products in the study area;
- ◆ Conduct interviews, focus groups, and administer surveys of key stakeholders to collect primary data about the potential for developing local production focused on serving local and regional markets for agricultural products in the study area; and
- ◆ Make recommendations and develop a report characterizing project findings.

Select findings

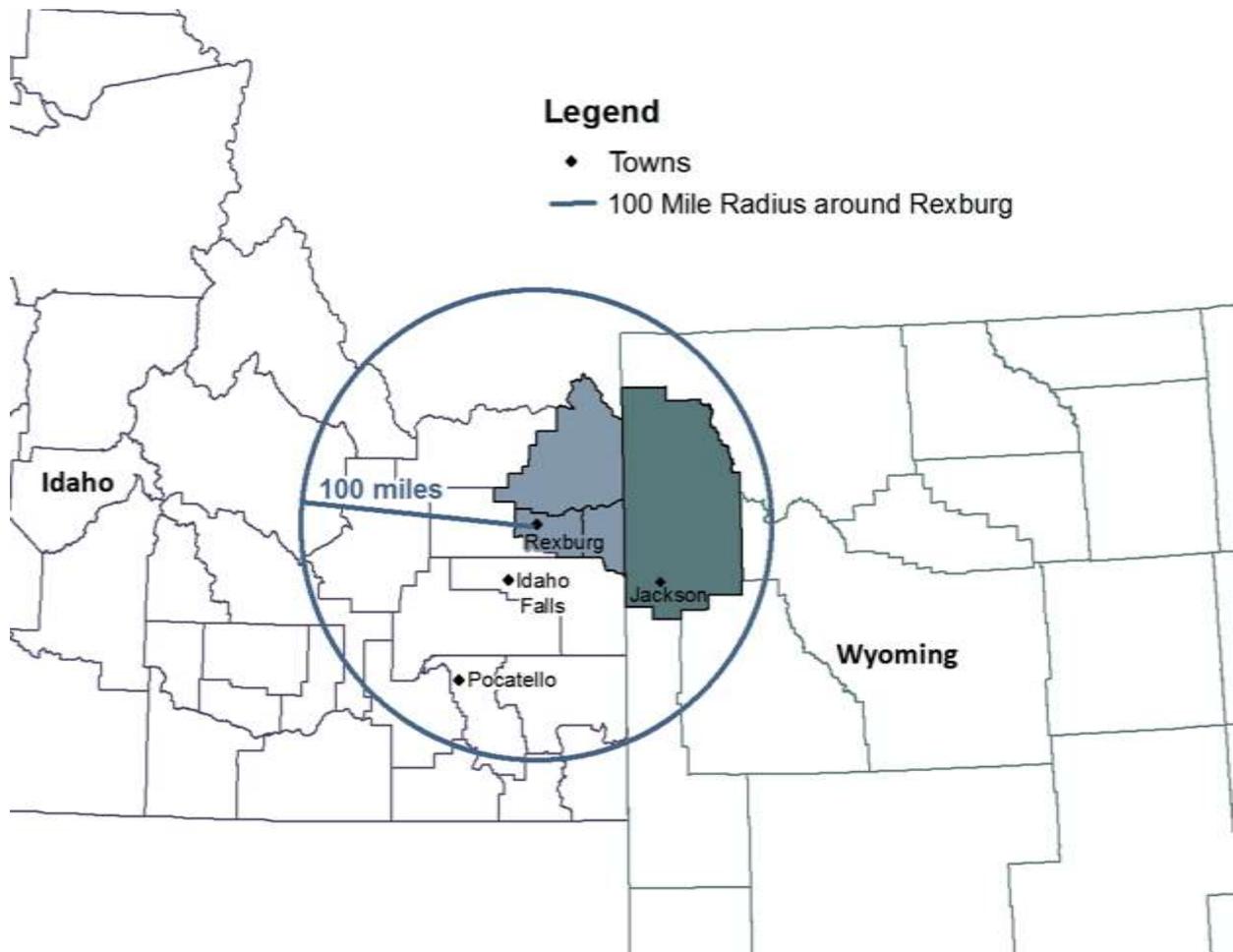
In sparsely populated areas, small amounts of income or a few jobs can be significant for a family and community. Assessment data identify great interest among many stakeholders, including producers and food buyers, in developing local and regional food chains. In fact, results demonstrate an active local food system. Other findings include the following:

Figure 1. Map of the study region



- ◆ The total number of farms in the four-county region increased 4% from 2007-2012. Most of this growth was in Fremont and Madison counties. Most of the increase was among the region's smallest farms: the region gained 57 farms under 10 acres in size.
- ◆ Only 20% of all farms in the region are larger than 500 acres, and about 40% are smaller operations with fewer than 50 acres.
- ◆ The number of producers engaged in direct sales and the number of producers selling locally is increasing.
- ◆ Local supply chains already exist, and a high percentage of producers surveyed already participate in them. The area is not starting from scratch, but building on existing economic activity. Many producers already sell some portion of their agricultural or food products locally, and roughly half of producer survey respondents estimated that 76-100% of their products are consumed locally.
- ◆ The majority of producers said they are interested in increasing the amount of products they sell locally, and the majority of buyers said they are interested in increasing the quantity and variety of products they source from local producers.
- ◆ The region is socioeconomically, culturally, and agriculturally diverse. A wider diversity of products is grown in the study region than reflected by USDA Agricultural Census data or than many potential buyers, producers and other stakeholders are aware of.
- ◆ While the cold climate and short growing season present barriers for most producers, some sell animal and produce goods year-round.
- ◆ For producers, the most significant challenges for selling locally include inadequate time and ability to supply products year-round. For buyers, the most significant challenges for purchasing locally include availability of specific products and ability to access a large enough quantity.

Figure 2. Map illustrating a 100-mile radius around Rexburg, Idaho



What does “LOCAL” mean?

Throughout this report, we refer to four distinct geographical scales:

LOCAL = Within 100 miles

REGIONAL = More than 100 miles, but less than 500 miles

NATIONAL = 500 miles or farther in the United States

INTERNATIONAL = Outside of the United States

For example, the map above (Figure 2) identifies the region within a 100 mile radius of businesses located in Rexburg.



Preexisting data

The consulting team compiled preexisting data from several federal and nonprofit sources to characterize agricultural resources, potential supply, and types and locations of food-purchasing businesses (a proxy for estimating potential demand) in the four-county region. The majority of secondary data came from the USDA Department of Agriculture³ and the US Census Bureau.

Buyer interviews

In October 2014, the project team conducted 11 phone interviews with representatives from institutions, businesses, and organizations that purchase food products in the study region. Buyer interview participants included produce managers, business owners, food service managers, and other positions, including representatives from restaurants, institutions (e.g., school districts, hospitals, and corrections), and grocery stores (Figure 3). Many food buyer participants preferred to remain anonymous, but several gave permission for us to mention them by name, title, and business or organization in this report:

- Amy Young, Owner and Chef, Lotus Café, Jackson, WY
- Corby Egan, Phillip’s Lodge, Island Park, ID
- Erica Rice, Marketing Sales Director, Jackson Whole Grocer, Jackson, WY
- Gloria Grube, Produce Manager, Dave’s Jubilee Grocery, Ashton, ID
- Margaret Hubbard, Food Service Manager, St John’s Medical Center, Jackson, WY

What is counted in the USDA Census of Agriculture?

Every five years, the USDA sends census forms to all farms and ranches selling at least \$1,000 of agricultural products. The most recent survey asked operators to report on land use, land ownership, operator characteristics, production practices, income, and expenditures during the 2012 calendar year.

³ For more information about the USDA Census of Agriculture, visit http://www.agcensus.usda.gov/Help/FAQs/General_FAQs/

- Matt Thueson, Food Service Manager, Madison Memorial Hospital, Rexburg, ID
- Todd Huchendorft, Food Services Director, Brigham Young University-Idaho, Rexburg, ID

Figure 3. Distribution of food buyer interview participants by organization type and county

County	Restaurants	Grocers	Institutions	Total
Fremont, ID	2	1		3
Madison County, ID			3	3
Teton County, ID		2		2
Teton County, WY	1	1	1	3
Total	3	4	4	11

Buyer interview participants were identified using InfoUSA⁴ data and through recommendations from High Country RC&D staff members and project volunteers who live in the study area. Buyer interviews were conducted by phone at a time of participants' convenience and ranged from 15 to 45 minutes. All buyer interviews were audio recorded with permission, transcribed, and analyzed using AtlasTi Qualitative Data Analysis software. The consulting team followed a grounded theory approach to analyzing qualitative data, which involved a systematic process of identifying and interpreting patterns that emerged across interviews.^{5,6} The process then identified key themes and contradictions in the data. The final step was to list key themes and highlight quotations that illustrated each.

The goal of the interviews was to gain in-depth, contextual data to help us understand food buyers' perspectives on and experiences with purchasing food produced locally. Interviews covered topics that included buyers' current purchasing practices, preferred food characteristics, perceived barriers, and strategies for marketing and selling local products to local buyers. [Appendix A](#) provides the complete food buyer interview guide.

Buyer survey

We conducted a web-based survey of food buyers targeting a variety of respondent types (e.g., bakeries, coffee shops, convenience stores, conventional supermarkets, restaurants, institutions) from October 14 to November 14, 2014. We created an initial sampling frame for food buyer respondents in the study region using the list of business names and contact information available through InfoUSA. We then identified additional respondents and email addresses through an Internet search for a total of 63 deliverable email addresses. Seventeen of 63 food buyers we emailed responded to the survey. The survey took respondents an average of eight minutes to complete. Refer to [Appendix B](#) for a copy of the food buyer survey. The survey was administered using Qualtrics Online Survey Software.

⁴ InfoUSA manages a consumer and business contact database. For more information about InfoUSA, visit <http://www.infousa.com/>

⁵ Charmaz, K. (2006). *Constructing Grounded Theory: A Practical Guide through Qualitative Analysis* (1 edition.). London ; Thousand Oaks, Calif: SAGE Publications Ltd.

⁶ Glaser, B., & Strauss, A. (1967). *The Discovery of Grounded Theory: Strategies for Qualitative Research*. Hawthorne, NY: Aldine Transaction.

Producer interviews and focus groups

In November 2014, the OGPD team worked with members of the project advisory board and High Country RC&D staff to conduct interviews and focus groups with producers. The primary role of the advisory board members and High Country RC&D staff was to identify and recruit participants for the interviews and focus groups as well as to organize the logistics of reserving meeting space and providing refreshments. The primary role of the OGPD team was to facilitate the focus groups and interviews. The goal of the interviews and focus groups was to add in-depth, contextual data to the analysis on a variety of topics that included producers' perspectives on the potential for developing local production, barriers and market opportunities, distribution strategies, interest in participating in different strategies, production timing, and products potentially available to local and regional markets. [Appendices C and D](#) provide producer interview and focus group questions. All interviews and focus groups were audio recorded with permission from participants. The analysis followed the same grounded theory approach described in the buyer interview section.

We conducted six in-person interviews that involved eight producers (two of the interviews were with married co-farm operators). Interviews were conducted at a time and place convenient for participants, but most were conducted on-site at producers' operations. Interviews ranged from 25 to 60 minutes.



On November 5, 2014, we facilitated a producer focus group in St. Anthony, ID. Seven producers participated. Of those, one was from Madison County, ID, and six were from Fremont County, ID. On November 6, 2014, we facilitated two focus groups in Driggs, ID. One focus group included three participants whose primary activity is livestock production, while the other included six participants whose operations primarily produce fruits, vegetables, and value-added food products. Of the nine producers who participated in the Driggs focus groups, eight were from Teton County, ID, and one was from Teton County, WY (Figure 4). Focus groups lasted approximately 60 minutes.

Producer survey

We conducted a web-based survey of producers using Qualtrics Online Survey Software from October 7 to November 14, 2014. Participants were recruited in multiple ways, but most commonly members of the project advisory board and High Country RC&D staff recruited producers by phone and in-person and asked colleagues and staff members of other organizations to distribute and advertise the survey. Additionally, two press releases informed

the public of the opportunity to participate. Thirty-one respondents completed the questionnaire. The survey took respondents an average of 11 minutes to complete.

The goal of the producer survey was to gather the following types of information:

- Producers’ interest in and experiences with selling products to local and regional buyers;
- Types and amounts of products farmers and ranchers currently produce, especially for local and regional markets;
- Seasonality of locally grown products,
- Obstacles of selling products to local and regional buyers; and
- Characteristics of participants and their operations to provide context, to determine representativeness of respondents, and to compare survey data to existing data.

Refer to [Appendix E](#) for a copy of the survey instrument.

Processor interview

On November 4, 2014, we interviewed Brent Jones, owner of Jones Meats and Food Services, Inc., a USDA-inspected meat processing business located in Rigby, ID. This interview lasted approximately 60 minutes and was audio recorded and incorporated into our analysis. Refer to [Appendix F](#) for the full processor interview guide.

Key informant interviews

Key informants are people who are knowledgeable on a topic and context. In addition to incorporating perspectives of producers, a processor, and food buyers, we conducted four key informant interviews that involved five participants (two of the participants were interviewed together). Key informant interviews lasted approximately 60 minutes, were audio recorded, transcribed, and analyzed (see Figure 4 for a complete breakdown of participants by type, method, and county).

Figure 4. Number of assessment participants by stakeholder type, methodology, and county

Number of participants, by research methods								
	Fremont	Madison	Teton, ID	Teton, WY	Unreported	STUDY AREA	Outside of study area	TOTAL
SURVEYS								
Buyers	1	1	8	6	1	17	0	17
Producers	3	0	15	2	11	31	1	32
INTERVIEWS								
Buyers	3	3	2	3	0	11	0	11
Producers	0	1	6	0	0	7	0	7
Meat processors	0	0	0	0	0	0	1	1
Key informants	4	0	0	1	0	5	0	5
FOCUS GROUPS								
Producers	6	1	9	1	0	17	0	17
TOTAL	17	6	40	13	12	88	2	90

Interpreting primary data

Primary data from surveys, interviews, and focus groups were collected using convenience sampling. Many participants either self-selected or were asked to participate because they had

certain characteristics (e.g., small producer or sells locally). Although the results cannot be generalized to the entire producer and buyer populations, they add a more accurate and nuanced understanding of an important subset of local producers and the potential demand important for developing local and regional food systems.



The four-county study region

Land context

The geography of the study area poses many challenges for local producers. The region has little space available for production, a low population density, and large transportation distances to major population centers. The area has a short growing season, which adds more challenges for producers.

Land ownership

Despite being a large area, land available for crop and livestock production is limited. Across the four counties, 81% of all land is public: a third of all land in Idaho’s Madison and Teton counties, two-thirds of land in Fremont County, and almost all land in Teton County, WY, is public⁷ (Figure 5 and Figure 6).

With the exception of Madison County, the study area is sparsely populated. The population densities of Fremont County and Teton County, WY, are extremely low, similar to Wyoming’s average of 5.8 people per square mile, but lower than Idaho’s average of 19.0, and much lower than the national average of 87.4 people per square mile (Figure 7).⁸

Figure 5. Public and private land in the study region by county, acres and %

	Fremont	Madison	Teton, ID	Teton, WY
Total acres	1,194,752	301,824	288,256	2,701,952
Private, acres	370,316	214,093	191,275	76,962
Public, acres	823,850	85,759	96,775	2,624,990
Private, %	31.0	70.9	66.4	2.8
Public, %	69.0	28.4	33.6	97.2

SOURCE: Idaho Association of Counties, and Wyoming State Historical Society

⁷ Idaho Association of Counties, Idaho Public Lands: Facts and Figures, 2010, <http://www.idcounties.org/DocumentCenter/Home/View/97>; Wyoming State Historical Society, Teton County, WY, <http://www.wyohistory.org/encyclopedia/teton-county-wyoming>

⁸ US Census Bureau, State and County QuickFacts, <http://quickfacts.census.gov/qfd/index.html>

Figure 6. Public and private lands in the study region

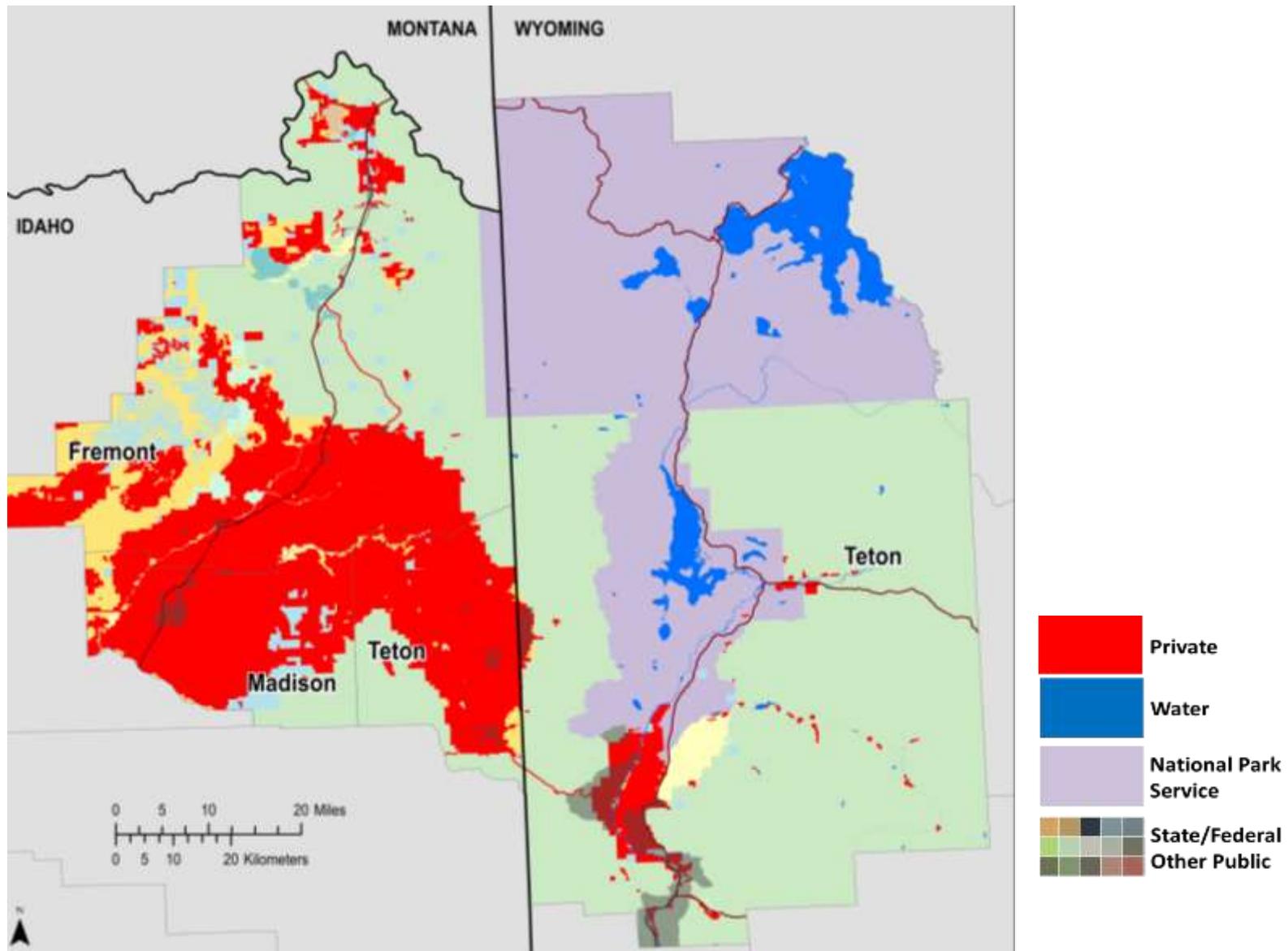


Figure 7. Land area and people per square mile in the study region by county

	Fremont	Madison	Teton, ID	Teton, WY
Persons per square mile, 2010	7.1	80.0	22.6	5.3
Land area in square miles, 2010	1,864	469	449	3,995

SOURCE: US Census Bureau

Producers have to travel or ship their products a long distance to reach major population centers (Figure 8).⁹ The remoteness of the region also adds seasonal challenges for shipping (Figure 9): for example, Highway 47 north of Warm River is closed during the winter, and Highways 32 and 33 are sometimes closed due to drifting snow.

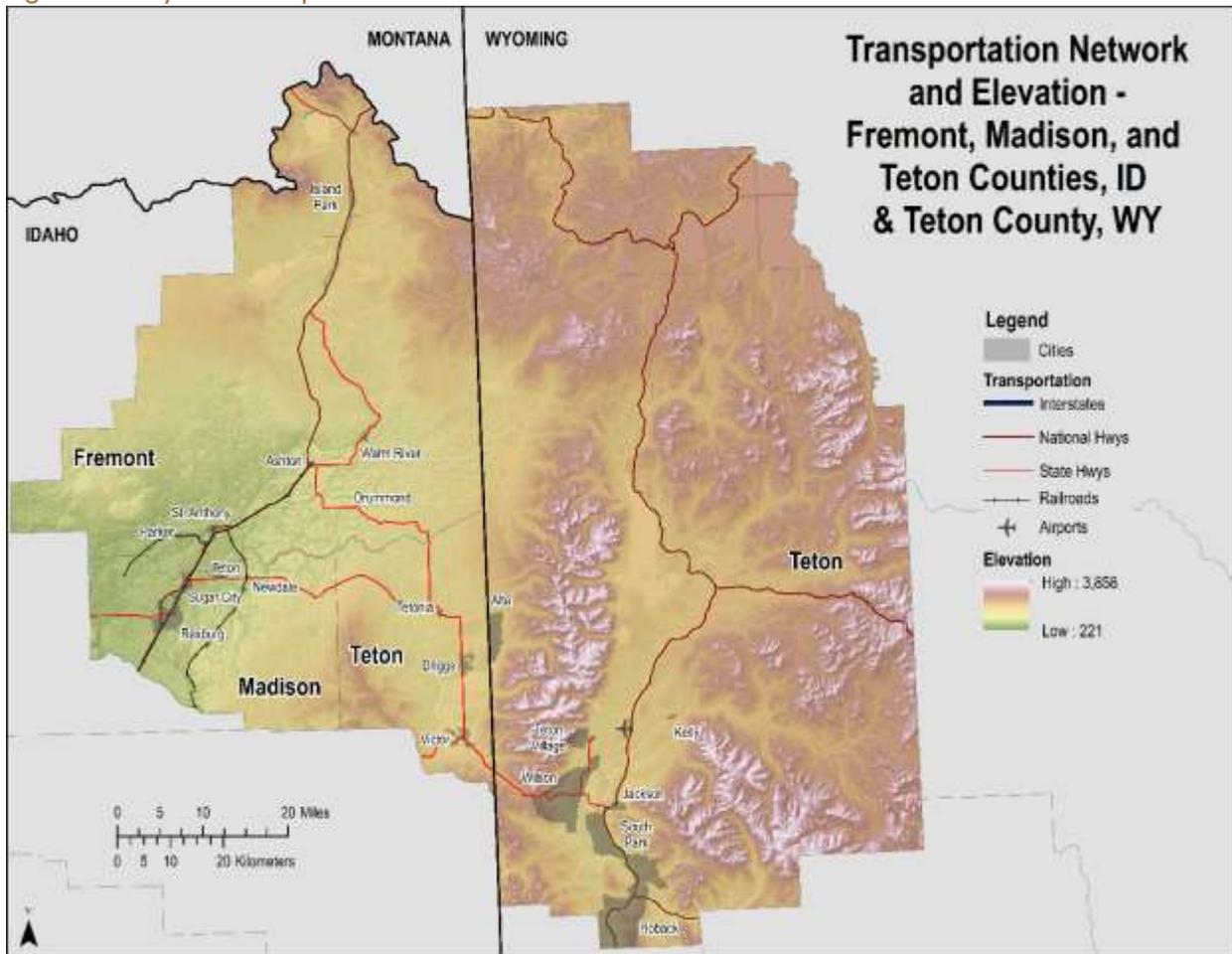
Figure 8. Distance from local towns to regional population centers (miles), and population size of regional population centers by county

DISTANCE (miles)	Madison		Fremont		Teton, ID		Teton, WY
	Rexburg	Sugar City	St. Anthony	Ashton	Victor	Driggs	Jackson Hole
Rexburg (<i>pop.</i> 25,484)	0	5	13	27	55	47	80
Jackson Hole (<i>pop.</i> 20,669)	80	75	76	72	24	33	0
Idaho Falls (<i>pop.</i> 56,813)	27	32	39	53	64	73	88
Blackfoot (<i>pop.</i> 11,899)	55	60	67	81	93	101	118
Pocatello (<i>pop.</i> 54,255)	78	82	89	104	116	124	141
Bozeman, MT (<i>pop.</i> 37,280)	178	174	166	152	200	191	224
Butte, MT (<i>pop.</i> 33,525)	200	204	211	176	223	215	248
Twin Falls (<i>pop.</i> 44,125)	185	190	197	211	224	232	248
Salt Lake City, UT (<i>pop.</i> 186,440)	240	245	252	266	279	287	280
Boise (<i>pop.</i> 205,671)	313	317	324	338	351	359	375

SOURCE: US Census Bureau, and DistanceFromTo.net

⁹ US Census Bureau, Population Estimates Program, <http://www.census.gov/popest/>; and DistanceFromTo, <http://www.distancefromto.net/>

Figure 9. Study area transportation network



Sources: InfoUSA, ESRI, US Census Bureau, USGS

Socioeconomic characteristics

The total population of the four-county region was 82,920 in 2013. The four counties vary considerably in population size, ranging from 10,275 in Teton County, ID, to 27,450 in Madison County. Since 2000, the region has added almost 20,000 residents, with much of this growth taking place between 2000 and 2010 in Idaho's Madison and Teton counties. Since 2010, annual rates of growth have slowed in both Teton counties, and Fremont and Madison counties have lost population. The four counties each have characteristics that set them apart (Figure 10):

- ◆ Fremont County has a small population that decreased in recent years. Of the four counties, Fremont County has the smallest percentage of adults with at least a four-year college degree (19%) and the largest percentage of adults without a high school diploma (13%). Like Teton County, WY, Fremont County had small fluctuations in its number of jobs during and since the latest economic recession.¹⁰ The county's total number of jobs has returned to pre-recession levels. Unemployment rates in the four-county region are

¹⁰ According to the National Bureau of Economic Research, the latest economic recession started in December 2007 and ended in June 2009. For more information, visit <http://www.nber.org/cycles.html>.

highest in Fremont County. Fremont County's rate has declined since the end of the recession, however, and is now lower than the state rate: 5.9% in Fremont County compared to 6.2% in Idaho. Fremont County has the highest self-employment rate of the region, accounting for 44% of all jobs, much higher than Idaho's rate of 27%.

- ◆ Madison County has the largest population of the four counties. Its total population increased by 10,000 people between 2000 and 2010 and decreased very slightly since 2010. This is the youngest county in the four-county region, with a median age of 23 years compared to Idaho's median of 36 and Wyoming's median of 37. Of the four counties, Madison County has the lowest median household income (\$37,565), lower than Idaho's median of \$45,296. Poverty rates are highest in Madison County, where the overall poverty rate is 27%, much higher than Idaho's rate of 16%. Madison County's young age, low income, and high poverty rates are due, at least in part, to the large student population at BYU-Idaho. A third of Madison County adults have at least a four-year college degree, and very few are without a high school diploma. Madison County lost 1,400 jobs during the last recession, but has returned to pre-recession levels. Since the recession ended, Madison County's unemployment rate has decreased to 4.6%, the lowest in the region, but still higher than its pre-recession unemployment rate of 2.1%. Of the four counties, Madison County has the lowest self-employment rate (24%).



- ◆ Teton County, ID, experienced dramatic population growth between 2000 and 2010, when the population increased 70%, and very slow growth since 2010. While this county does not have the highest median household income in the four-county region, its median household income is about \$9,000 per year higher than the state median: \$54,231 in Teton compared to \$45,296 in Idaho. Of counties in the study region, Teton County, ID, had the largest percent decrease in total number of jobs during the last recession, and jobs numbers have yet to return to pre-recession levels. The county had 300 more jobs before the recession started in 2007 than it did in 2012. Teton County, ID, has the second highest self-employment rate in the region at 43%.
- ◆ The population of Teton County, WY, has increased fairly steadily since 2000. While it has the highest median age in the four-county region – 38 years old – its median age is similar to state medians in Idaho and Wyoming. Adults in this county have the highest levels of educational attainment: about half have at least a four-year college degree. Teton County, WY, has the highest median household income in the region: \$66,582,

which is much higher than Wyoming’s median of \$55,104. This county’s poverty rate of 9% is the lowest in the region and lower than Wyoming’s rate of 12%. Like Fremont County, ID, Teton County, WY, had small fluctuations in its number of jobs during and since the latest recession. The county’s total number of jobs has returned to pre-recession levels.

As far as gaining back lost jobs, the four-county study region is rebounding better from the recession than Idaho or Wyoming as a whole. The total number of jobs in each of the counties, except Teton County, ID, has returned to pre-recession levels, and all four counties had a greater percentage of job growth between 2009 and 2012 than Idaho, where the number of jobs increased 1%, and Wyoming, where the number of jobs did not change.

Figure 10. Select socioeconomic characteristics by county¹¹

	Fremont	Madison	Teton, ID	Teton, WY
Total population				
2000	11,819	27,467	5,999	18,257
2010	13,242	37,536	10,170	21,294
2013	12,927	37,450	10,275	22,268
Average annual rate of change, 2000-2010 (%)	1.2	3.7	7.0	1.7
Average annual rate of change, 2010-2013 (%)	-0.8	-0.1	0.3	1.5
Median age, 2013	36.0	23.1	35.5	38.1
Educational attainment, pop aged 25+, 2008-2012 average				
Percent without a high school diploma	13	5	12	4
Percent with a 4-year college degree or greater	19	32	33	49
Median household income (\$), 2012	41,629	37,565	54,231	66,592
Poverty rate (%), 2012	16	27	13	9
Number of jobs				
2007, beginning of the recession	5,309	18,963	5,119	26,940
2009, end of th recession	5,199	17,542	4,412	26,648
2012	5,332	18,969	4,812	27,111
Job change during the recession (%), 2007-2009	-2.1	-7.5	-13.8	-1.1
Job change since the recession (%), 2009-2012	2.6	8.1	9.1	1.7
Average annual unemployment rate (%)				
2007, beginning of the recession	3.2	2.1	1.6	2.2
2009, end of th recession	7.6	5.1	5.9	6.9
2013	5.9	4.6	5.0	5.3
Self-employment rate (%), 2012	43.6	24.0	42.5	33.2

SOURCE: US Census Bureau, US Bureau of Economic Analysis, US Bureau of Labor Statistic

¹¹ US Census Bureau, 2010 Decennial Census, <http://www.census.gov/popest/>; US Census Bureau, Population Estimates Program, <http://www.census.gov/popest/>; US Census Bureau, 2008-2012 American Community Survey, 5-Year Estimates, <http://factfinder2.census.gov/>; US Census Bureau, Small Area Income and Poverty Estimates, <http://www.census.gov/did/www/saie/>; US Bureau of Economic Analysis, Regional Economic Data, Local Area Personal Income, <http://www.bea.gov/iTable/iTable.cfm?ReqID=70&step=1#reqid=70&step=1&isuri=1>; and US Bureau of Labor Statistics, Local Area Unemployment Statistics, <http://stats.bls.gov/lau/home.htm>.

Industry structure

While agriculture is an important industry in the four-county region, its impact on county economies varies. As a percentage of all jobs, farming accounts for 13% of jobs in Fremont County, but only 1% of jobs in Teton County, WY. Each county has dominant industries. Industries accounting for the greatest number of jobs by county include the following:

- ◆ Fremont County – government (1,119), farming (712), and retail trade (480).
- ◆ Madison County – government (2,170), retail trade (2,070), and wholesale trade (1,547).
- ◆ Teton County, ID – government (628), real estate and rental and leasing (510), and farming (432).
- ◆ Teton County, WY – accommodation and food services (6,486), real estate and rental and leasing (2,814), and government (2,397).

Top industries in Idaho include government, retail trade, health care, and social assistance. Top industries in Wyoming include government, retail trade, and accommodation and food services (Figure 11).

Figure 11. Industry structure by county¹²

EMPLOYMENT BY INDUSTRY, 2012	Fremont	Madison	Teton, ID	Teton, WY	STUDY REGION
Total employment (# jobs)	5,332	18,969	4,812	27,111	56,224
Top 5 industries in the TETON REGION	Number of jobs				
Accommodation and food services	303	1,031	414	6,486	8,234
Government	1,119	2,170	628	2,397	6,314
Retail trade	480	2,070	371	2,150	5,071
Real estate and rental and leasing	305	856	510	2,814	4,485
Construction	386	832	421	2,304	3,943
Farm employment	712	690	432	183	2,017
Top 5 industries in the TETON REGION	Percent of all jobs				
Accommodation and food services	6	5	9	24	15
Government	21	11	13	9	11
Retail trade	9	11	8	8	9
Real estate and rental and leasing	6	5	11	10	8
Construction	7	4	9	8	7
Farm employment	13	4	9	1	4

SOURCE: US Bureau of Economic Analysis

Study region producers

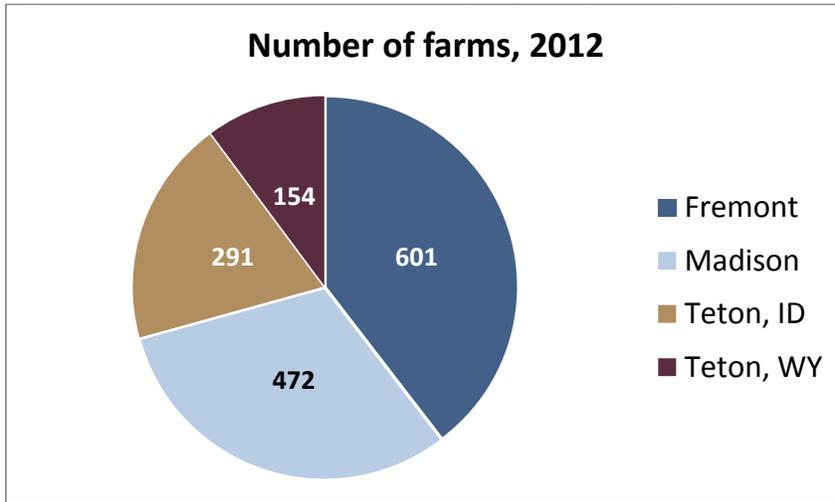
Secondary data

Farming is an important industry in the study area. Although the region has a lot of very large producers, there are many small-scale producers as well. The total number of farms in the study region increased from 1,465 in 2007 to 1,518 in 2012, a 4% increase (Figure 12) compared to an increase of 6% in Wyoming, a decrease of 2% in Idaho, and a decrease of 4% nationwide. This

¹² US Bureau of Economic Analysis, Regional Economic Data, Local Area Personal Income, <http://www.bea.gov/iTable/iTable.cfm?ReqID=70&step=1#reqid=70&step=1&isuri=1>.

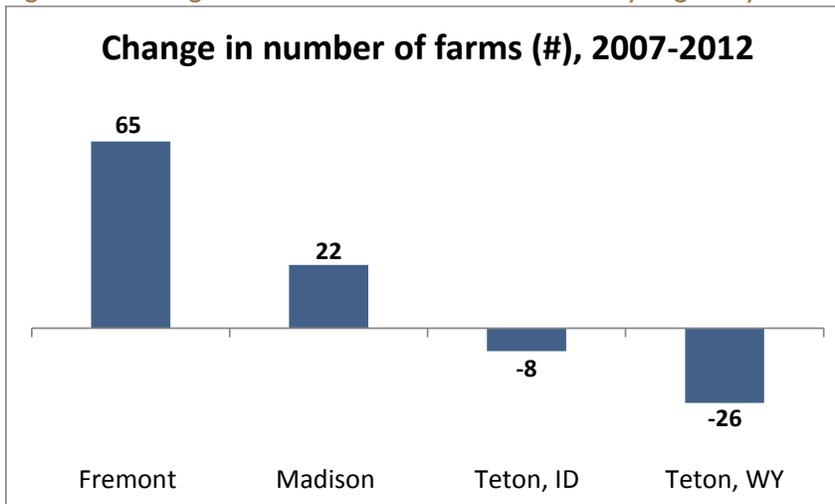
growth was not even across the region: while the number of farms in Fremont and Madison counties increased, the number decreased in both Teton counties (Figure 13).

Figure 12. Number of farms in the study region by county in 2012



SOURCE: USDA

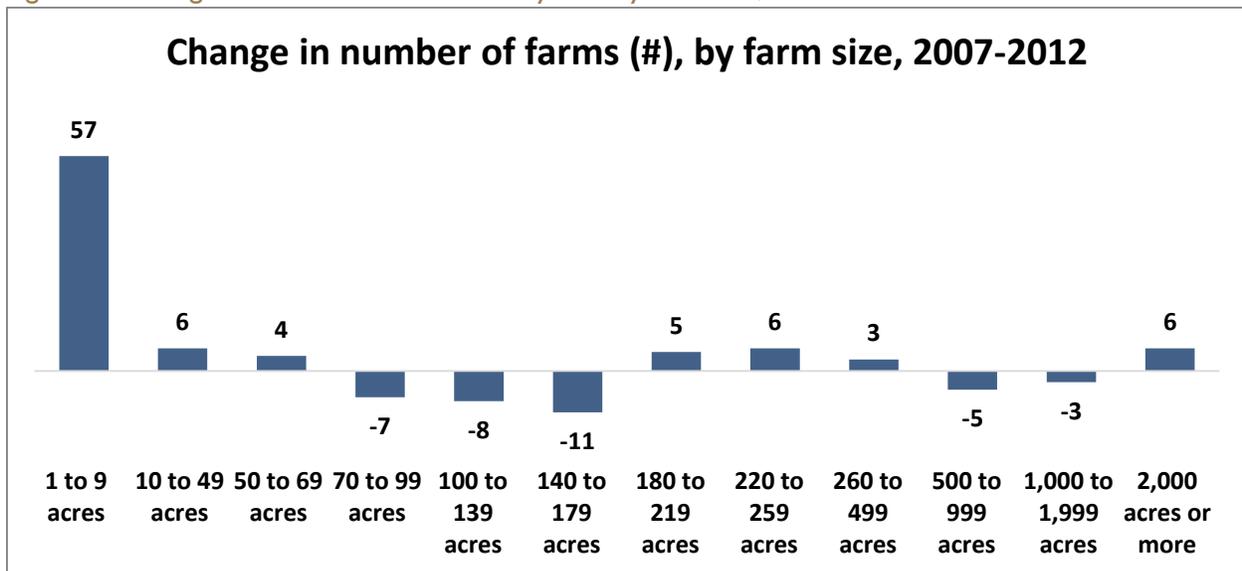
Figure 13. Change in the number of farms in the study region by county, 2007-2012



SOURCE: USDA

Most of this growth is among the smallest farms. Between 2007 and 2012, the region gained 57 farms under 10 acres in size (Figure 13). Of these, 27 are in Fremont County and 21 are in Madison County.

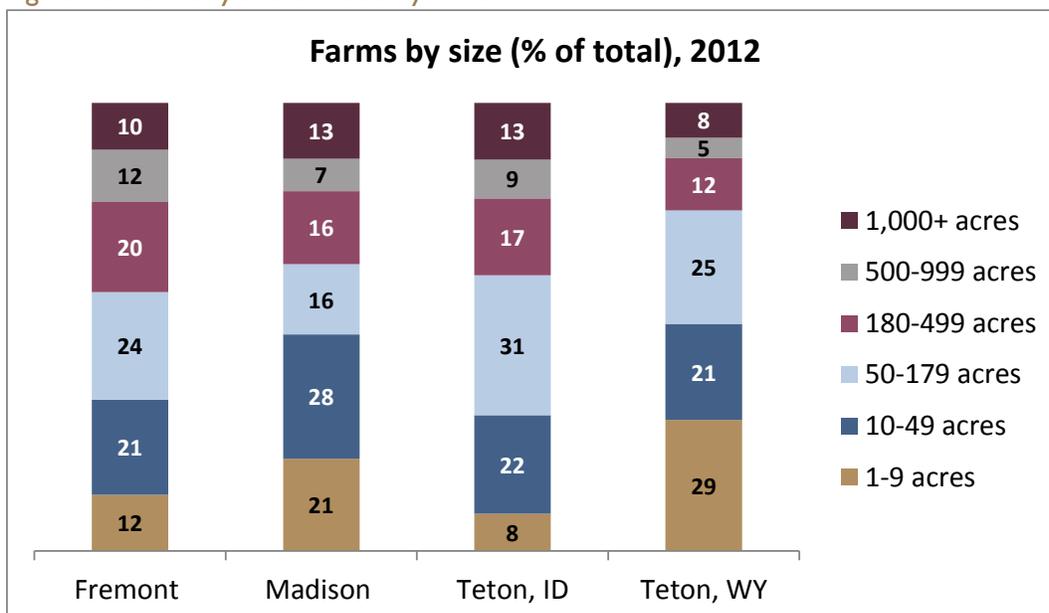
Figure 14. Change in number of farms in study area by farm size, 2007-2012



SOURCE: USDA

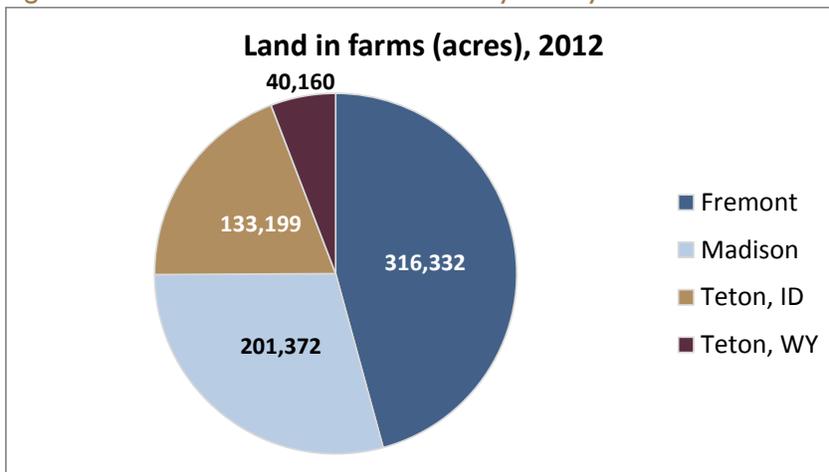
Farm size varies in the study region (Figure 15). Only 20% of all farms are larger than 500 acres, and about 40% are smaller operations with fewer than 50 acres. The share of small operations varies considerably by county: Teton County, WY, has the highest percentage of very small farms: 29% are smaller than 10 acres; on the other hand, in Teton County, ID, only 8% of all farms are this small. The median size of farms varies as well: 46 acres in Teton County, WY; 54 acres in Madison County; 106 acres in Teton County, ID; and 139 acres in Fremont County. Almost half of the region’s farmland is in Fremont County (Figure 16).

Figure 15. Farms by size and county in 2012



SOURCE: USDA

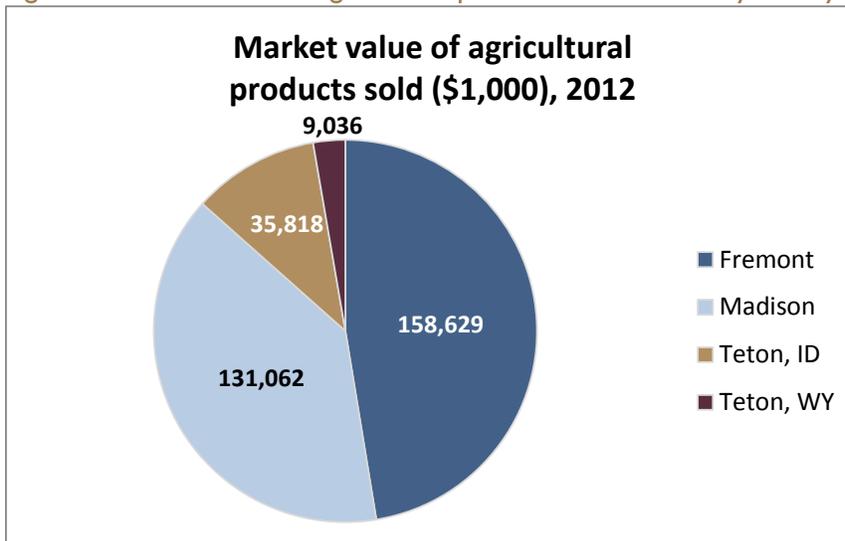
Figure 16. Acres of land in farms in 2012 by county



SOURCE: USDA

The market value of all agricultural products sold in these four counties amounted to \$334.5 million in 2012, with the majority of sales in Fremont and Madison counties (Figure 17).¹³ Unlike other counties in the study region, in Teton County, WY, livestock sales make up a large share (about three-quarters) of agricultural products sold in 2012 (Figure 18).

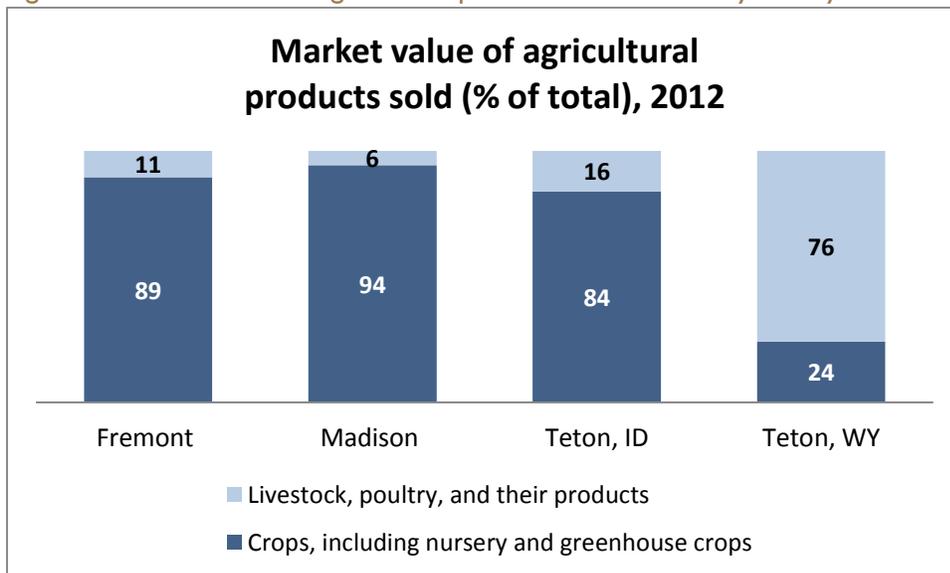
Figure 17. Market value of agricultural products sold in 2012 by county



SOURCE: USDA

¹³ From USDA: "The value of crops sold in 2012 does not necessarily represent the sales from crops harvested in 2012. Data may include sales from crops produced in earlier years and may exclude some crops produced in 2012 but held in storage and not sold. For commodities such as sugarbeets and wool sold through a co-op that made payments in several installments, respondents were requested to report the total value received in 2012." http://www.agcensus.usda.gov/Publications/2012/Online_Resources/Rankings_of_Market_Value/Definitions/index.asp.

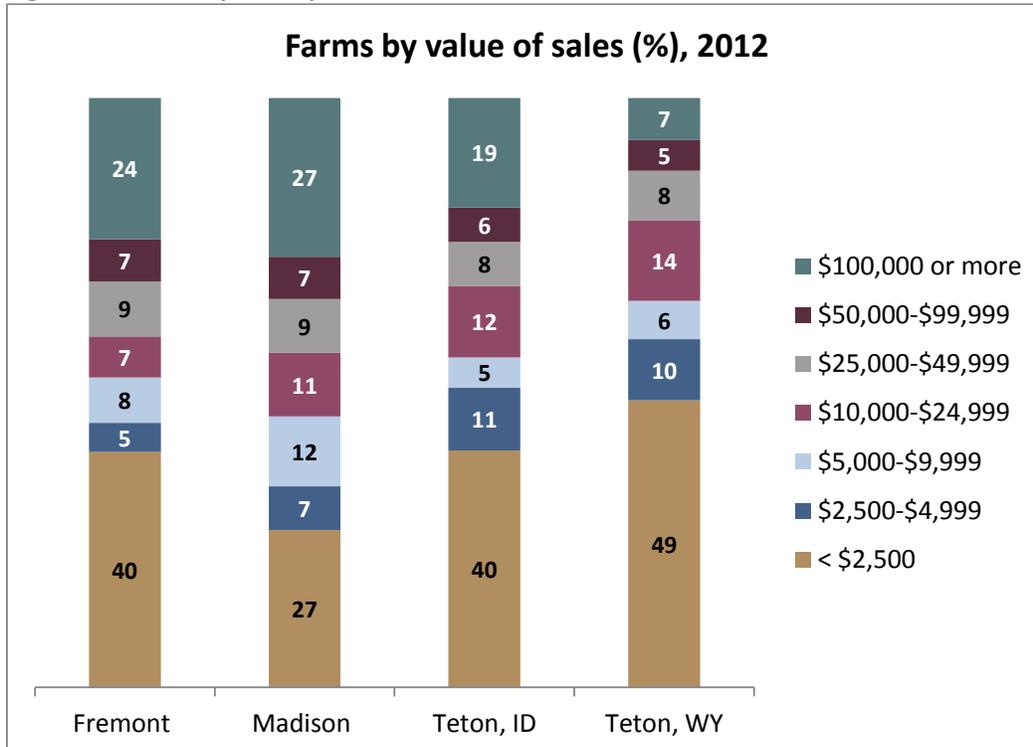
Figure 18. Market value of agricultural products sold in 2012 by county



SOURCE: USDA

Producers in Fremont and Madison counties are more likely to have sales greater than \$100,000. On the other hand, a large percentage of very small producers occurs in the region. About half of all producers in Teton County, WY, have sales less than \$2,500 (Figure 19).

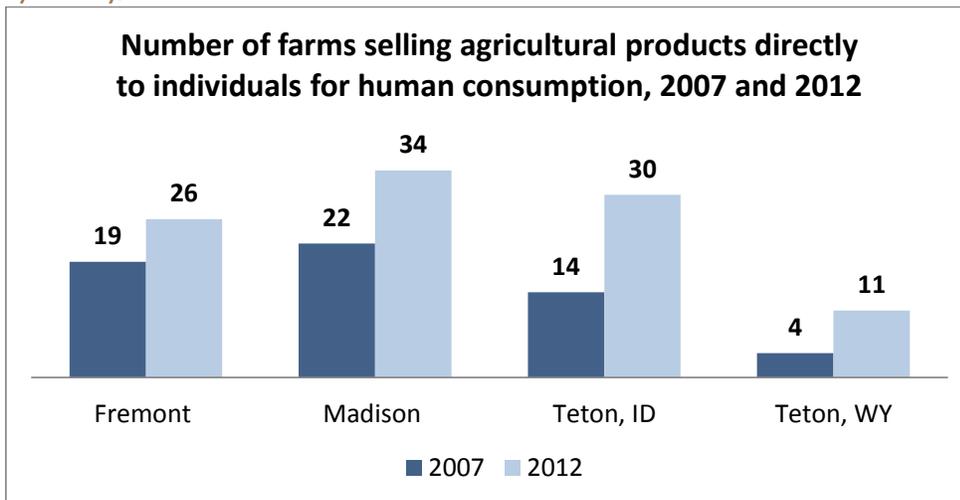
Figure 19. Farms by county and value of sales in 2012



SOURCE: USDA

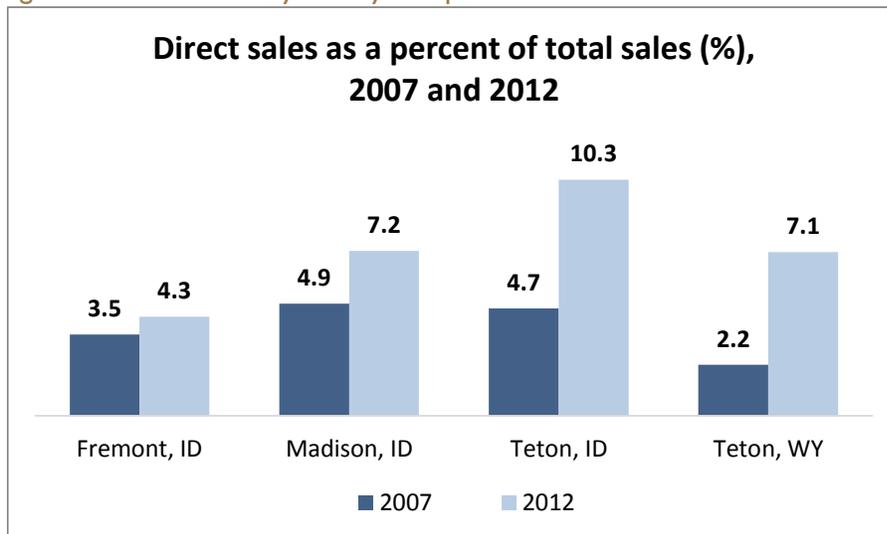
Sales directly to the consumer are increasing in the study area. The number of farms selling agricultural products directly to individuals for human consumption increased in all four counties between 2007 and 2012 (Figure 20). As a percentage of all agricultural sales, sales direct-to-consumer increased throughout the study area, but especially in both Teton counties where the percentage more than doubled between 2007 and 2012. Producers in Teton County, ID, are most likely to sell their products directly to the consumer (Figure 21). In 2012, 10% of all agricultural sales in Teton County, ID, were direct-to-consumer, more than twice as much as in Fremont County where the rate was only 4%.

Figure 20. Number of farms selling agricultural products directly to individuals for human consumption by county, 2007-2012



SOURCE: USDA

Figure 21. Direct sales by county as a percent of total sales in 2007 and 2012



SOURCE: USDA

Crops

Figure 22 lists the top crop products by number of acres in production in each county in 2012.

Figure 22. Top crop items by county and number of acres in 2012¹⁴

Top CROP items, by number of acres				
	Fremont, ID	Madison, ID	Teton, ID	Teton, WY
1	Barley for grain	Barley for grain	Barley for grain	Forage land for hay, etc.
2	Wheat for grain, all	Wheat for grain, all	Forage land for hay, etc.	Barley for grain
3	Spring wheat for grain	Spring wheat for grain	Wheat for grain, all	Nursery stock crops
4	Vegetables harvested, all	Vegetables harvested, all	Spring wheat for grain	Pecans, all
5	Potatoes	Potatoes	Vegetables harvested, all	Floriculture and bedding crops

SOURCE: USDA

Figure 23 shows the number of farms growing selected field crops in 2012.¹⁵ Of field crops, the most common is hay followed by barley and wheat.

Figure 23. Number of farms growing selected field crops in 2012 by county

Number of farms growing selected crops, 2012					
	Fremont	Madison	Teton, ID	Teton, WY	STUDY REGION
Hay, haylage, grass silage, greenchop	252	215	141	60	668
Barley for grain	146	134	56	2	338
Wheat for grain, all	96	98	14	0	208
Spring wheat for grain	83	92	11	0	186
Vegetables harvested for sale	68	77	16	0	161
Winter wheat for grain	24	8	8	0	40
Oats for grain	9	0	8	0	17
Land in orchards	2	7	6	1	16
Corn for silage of greenchop	4	3	0	0	7
Durum wheat for grain	0	3	0	0	3

SOURCE: USDA

Between 2007 and 2012, the number of farms harvesting vegetables for sale in the study region increased from 156 to 161, with most growth occurring in Madison County (Figure 24). The USDA's Agricultural Census indicates that no farms harvested vegetables in Teton County, WY, in either 2007 or 2012. However, our findings show that producers are harvesting vegetable

¹⁴ "Vegetables, all" includes potatoes, and "Wheat for grain, all" includes winter, spring, and durum wheat. These were the top five identified in 2012 USDA Agricultural Census County Profiles.

¹⁵ This table includes only field crops grown in the study region as listed in the USDA Agricultural Census. Field crops for which the USDA Agricultural Census shows no producers in these four counties include corn for grain, sorghum for grain, sorghum for silage or greenchop, soybeans for beans, dry edible beans, cotton, rice, sunflower seed, sugar beets for sugar, sugarcane for sugar.

products in Teton County, WY, and more producers raise a greater variety of vegetables in the other three counties than shown in USDA Census of Agriculture data.

Figure 24. Number of farms by county growing selected vegetables in 2012¹⁶

Number of farms growing selected vegetables, 2012					STUDY REGION
	Fremont	Madison	Teton, ID	Teton, WY	
Potatoes	66	74	12	0	152
Beans, snap (bush and pole)	4	2	4	0	10
Carrots	4	2	4	0	10
Tomatoes in the open	4	3	2	0	9
Pumpkins	2	4	2	0	8
Squash, all	2	3	2	0	7
Cucumbers and pickles	2	2	2	0	6
Onions, dry	2	2	2	0	6
Squash, summer	0	3	2	0	5
Garlic	0	0	4	0	4
Peas, green (excluding southern)	2	0	2	0	4
Squash, winter	2	0	2	0	4
Sweet corn	2	2	0	0	4
Beets	0	2	0	0	2
Peppers, bell (excluding pimiento)	2	0	0	0	2
Peppers other than bell (including chile)	2	0	0	0	2
Turnips	0	2	0	0	2

SOURCE: USDA

A small number of local producers grow fruits, nuts, and berries, with raspberries, apples, and strawberries being the most common. Only one producer in the region grows nuts according to the USDA Agricultural Census: pecans in Teton County, WY (Figure 25). See Figure 26 for a map of farms by sales volume for which fruit, vegetable, or grain production is the primary activity.

¹⁶ This table includes only vegetables grown in the study region as listed in the USDA Agricultural Census. Vegetables and melons for which the USDA Agricultural Census shows no producers in these four counties include asparagus, broccoli, cabbage, cantaloupes and muskmelons, cauliflower, collards, eggplant, fresh cut herbs, honeydew melons, kale, lettuce, mustard greens, green onions, sugar and show peas, radishes, rhubarb, spinach, and watermelons.

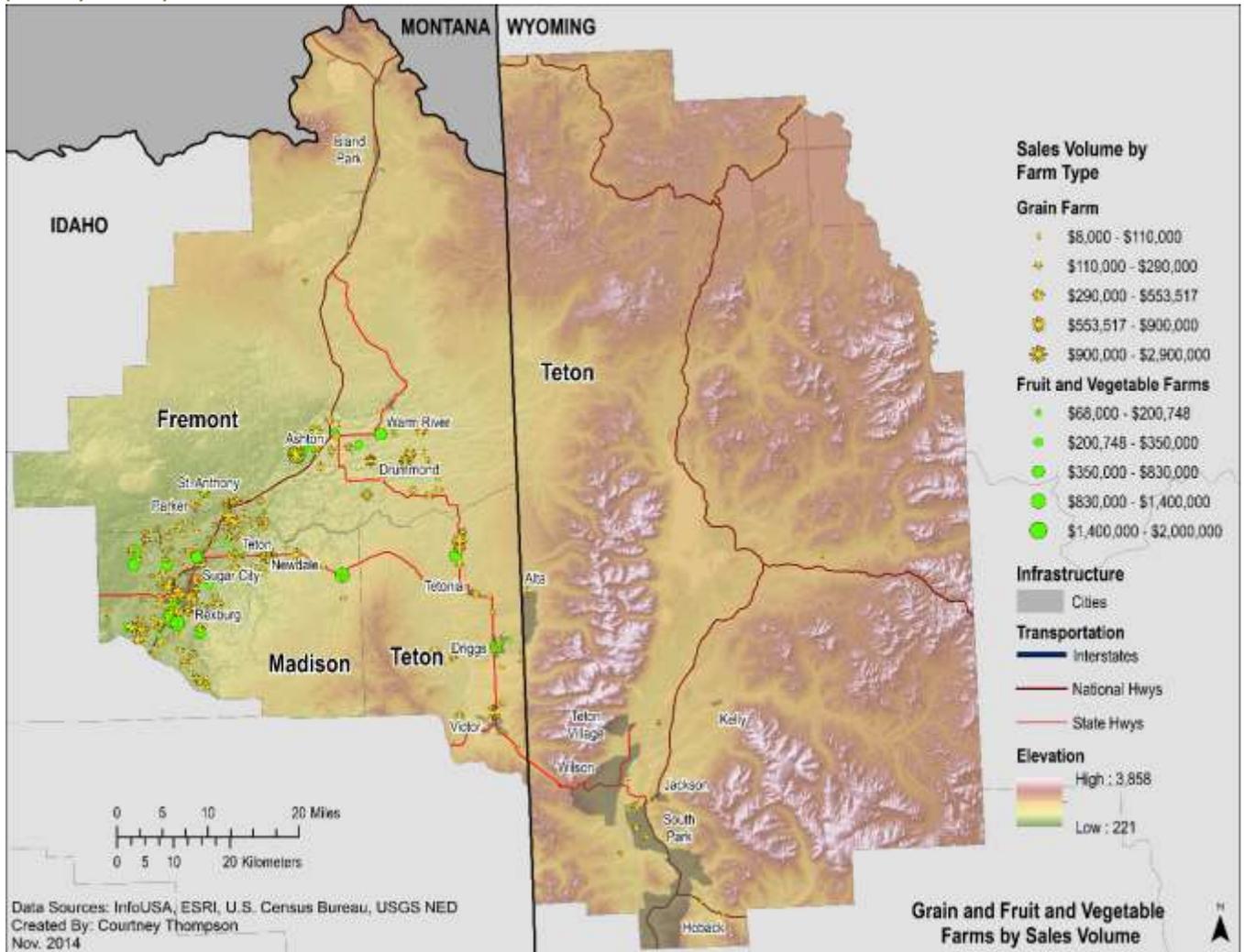
Figure 25. Number of farms by county growing fruits, nuts, and berries in 2012¹⁷

Number of farms growing selected fruits, nuts, and berries, 2012					
	Fremont	Madison	Teton, ID	Teton, WY	STUDY REGION
Raspberries	8	7	2	1	18
Apples	2	7	6	0	15
Strawberries	4	5	2	0	11
Cherries, tart	2	0	2	0	4
Blackberries and dewberries (including marionberries)	0	4	0	0	4
Pears, other than Bartlett	2	1	0	0	3
Cherries, sweet	2	0	0	0	2
Peaches	2	0	0	0	2
Plums and prunes	0	2	0	0	2
Currants	0	2	0	0	2
Other berries	0	2	0	0	2
Pecans, improved	0	0	0	1	1

SOURCE: USDA

¹⁷ This table includes only fruits, nuts, and berries grown in the study region as listed in the USDA Agricultural Census. Fruits, nuts, and berries for which the USDA Agricultural Census shows no producers in these four counties include apricots, grapes, nectarines, plum-apricot hybrids, almonds, chestnuts, hazelnuts, walnuts, blueberries, and boysenberries.

Figure 26. Distribution of farms by sales volume for which fruit, vegetable, or grain production is the primary activity



Sources: InfoUSA, ESRI, US Census Bureau, USGS

NOTE: These data are based on North American Industry Classification System (NAICS) codes rather than USDA Agricultural Census

Livestock

Producers in the study region raise a wide variety of livestock, with much of this production concentrated in Fremont County where nearly half of the region's livestock producers are located. The most common types of livestock raised by producers include beef cows (over 400 producers) and poultry layers (nearly 150 producers) (Figure 27).

Figure 27. Number of farms by county raising livestock in 2012¹⁸

Number of farms with livestock, 2012					STUDY REGION
	Fremont	Madison	Teton, ID	Teton, WY	
Beef cows	181	140	79	19	419
Poultry layers	74	46	30	7	157
Hogs and pigs	19	15	11	4	49
Sheep and lambs	29	12	0	2	43
Milk cows	19	6	11	0	36
Meat goats	13	9	6	6	34
Milk goats	16	4	2	0	22
Broilers and other meat-type chickens	6	4	4	4	18
Bee colonies	2	8	6	2	18
Turkeys	10	3	2	0	15
Elk in captivity	1	0	1	0	2

SOURCE: USDA

Figure 28. Top livestock items by county and number of animals raised in 2012

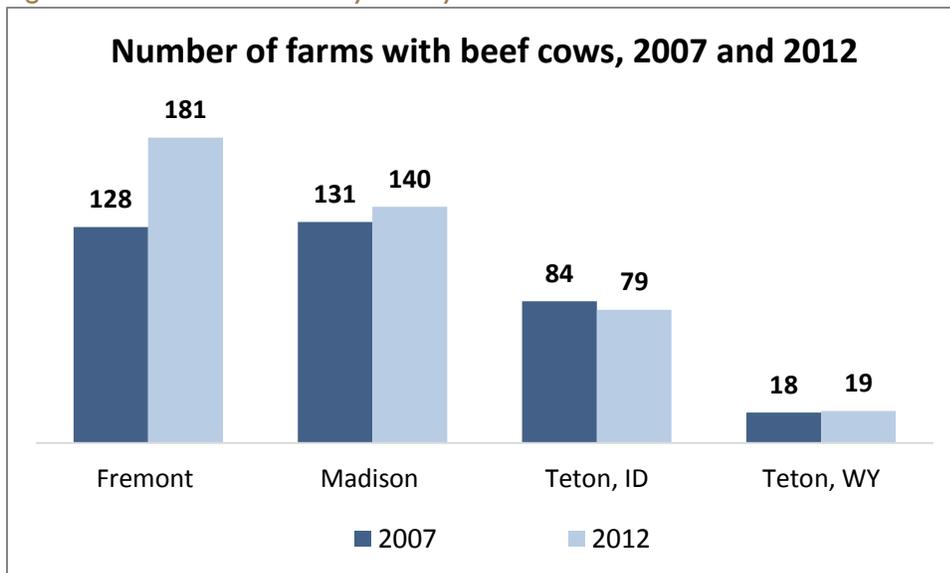
Top LIVESTOCK items, by number of animals			
	Fremont, ID	Madison, ID	Teton, WY
1	Cattle and calves	Cattle and calves	Cattle and calves
2	Sheep and lambs	Colonies of bees	Horses and ponies
3	Horses and ponies	Horses and ponies	Sheep and lambs
4	Poultry layers	Poultry layers	Mules, burros, and donkeys
5	Elk	Sheep and lambs	Poultry layers

SOURCE: USDA

Figure 28 reports the top livestock products in each county in 2012. The number of farms in the study region with beef cows increased from 361 in 2007 to 419 in 2012 (Figure 29), with most of this growth occurring in Fremont County. Teton County, ID, was the only county in the region to have a decrease, although the decrease was small. The majority of the study area's farms with beef cows have small herds with fewer than 50 head. Only 16 farms have beef cow herds of 200 or more head (Figure 30).

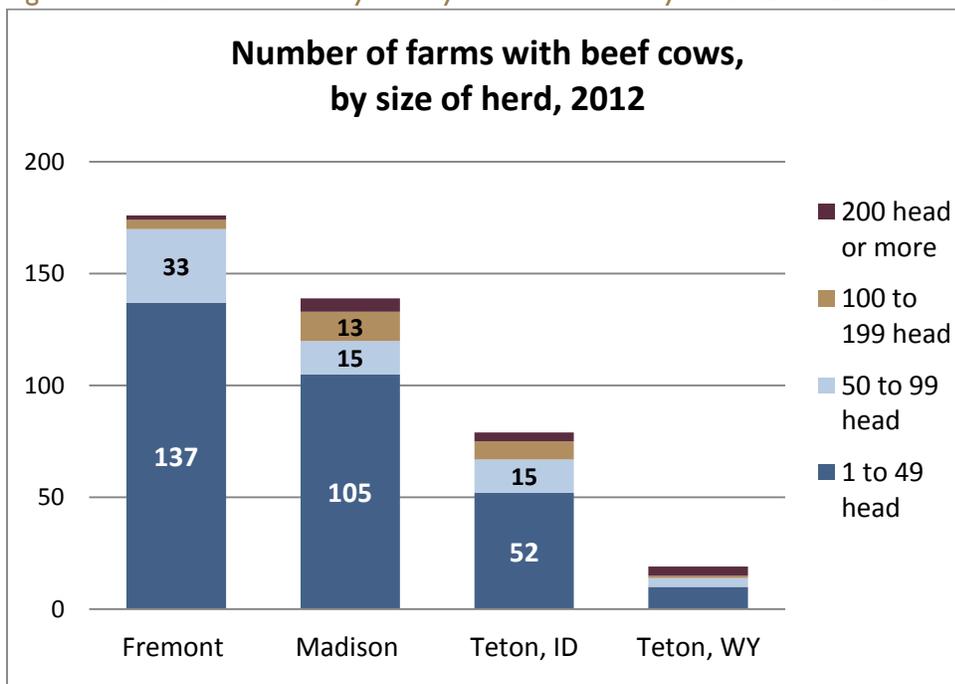
¹⁸ This table includes livestock raised in the study region as listed in the USDA Agricultural Census. A few types of livestock were left out even though the USDA Agricultural Census shows few producers raising them in the study region. Livestock for which the USDA Agricultural Census shows no producers, or only a few producers, include horses and ponies; mules, burros, and donkeys; angora goats; ducks, geese, and other miscellaneous poultry; aquaculture; bison; llamas; and rabbits.

Figure 29. Number of farms by county with beef cows in 2007 and 2012



SOURCE: USDA

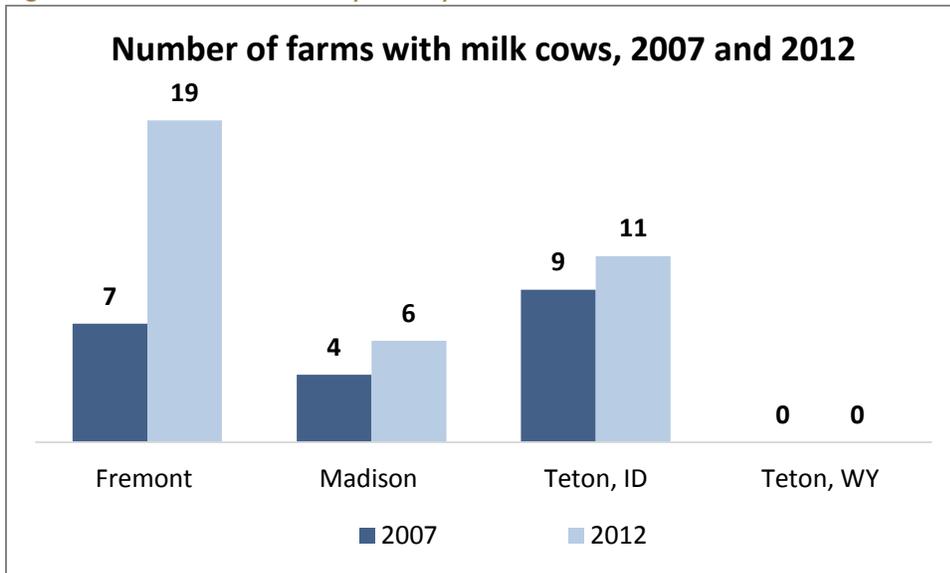
Figure 30. Number of farms by county with beef cows by herd size in 2012



SOURCE: USDA

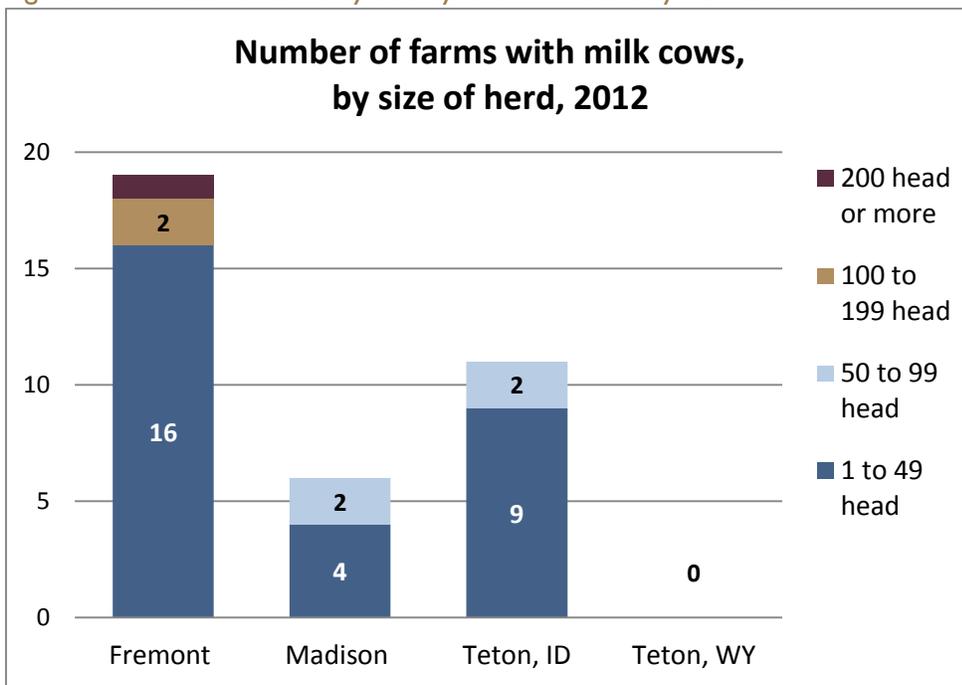
The number of farms in the study region with milk cows increased from 20 in 2007 to 36 in 2012 (Figure 31), with most growth occurring in Fremont County. Most of the study area’s farms with milk cows have herds smaller than 50 head, and no milk cow farms occur in Teton County, Wyoming (Figure 32). See Figure 33 for a map of farms for which beef or milk production is the primary activity.

Figure 31. Number of farms by county with milk cows in 2007 and 2012



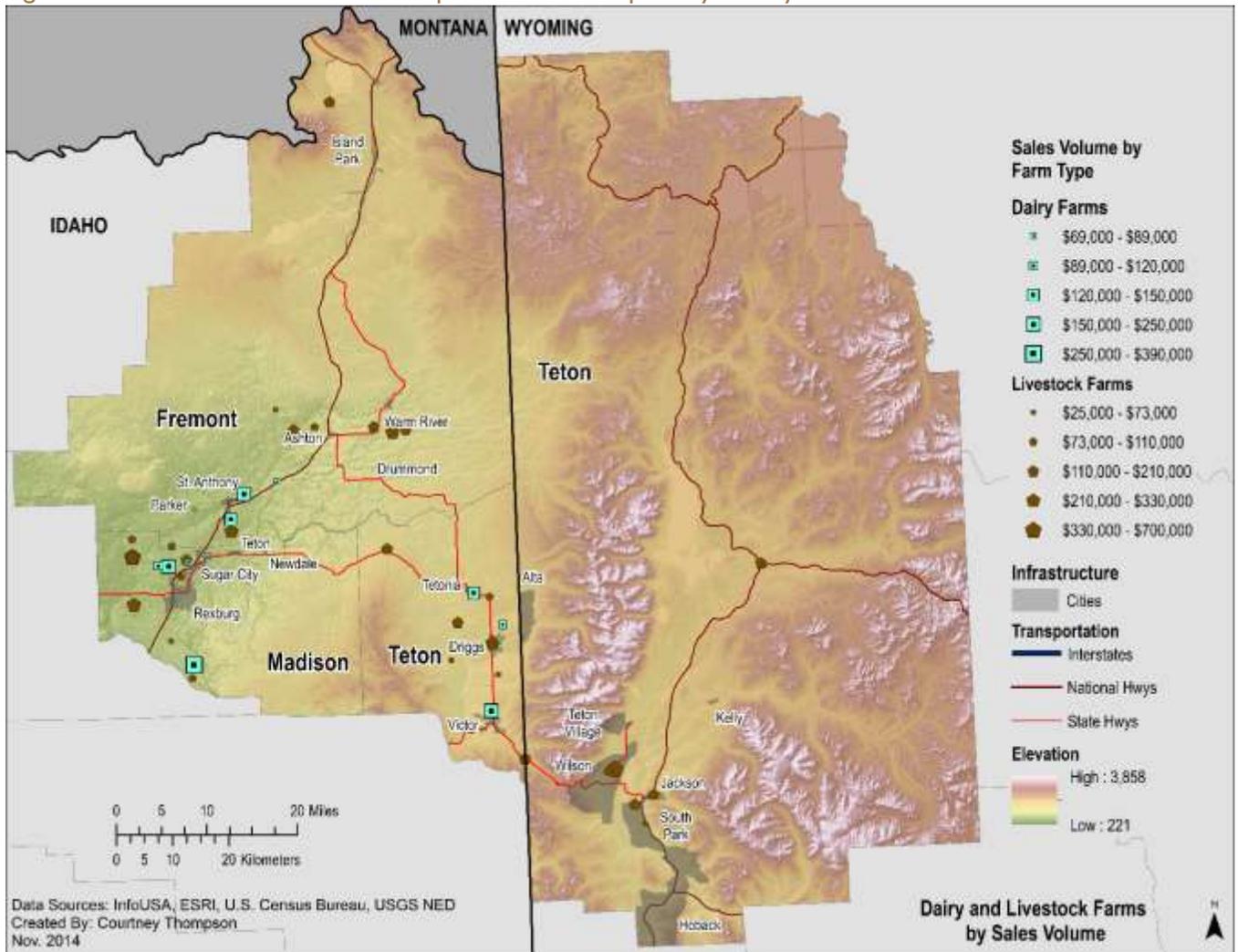
SOURCE: USDA

Figure 32. Number of farms by county with milk cows by herd size in 2012



SOURCE: USDA

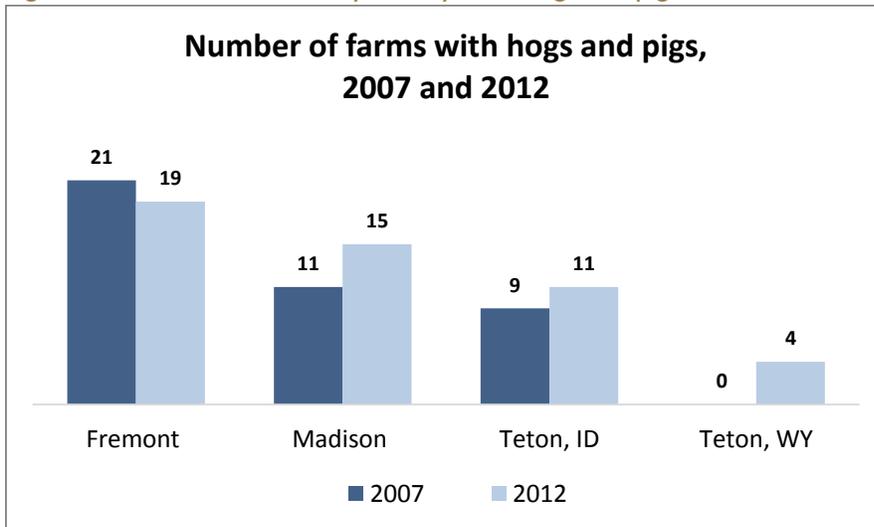
Figure 33. Farms for which beef or milk production is the primary activity



NOTE: These data are based on North American Industry Classification System (NAICS) codes, rather than the US Census of Agriculture

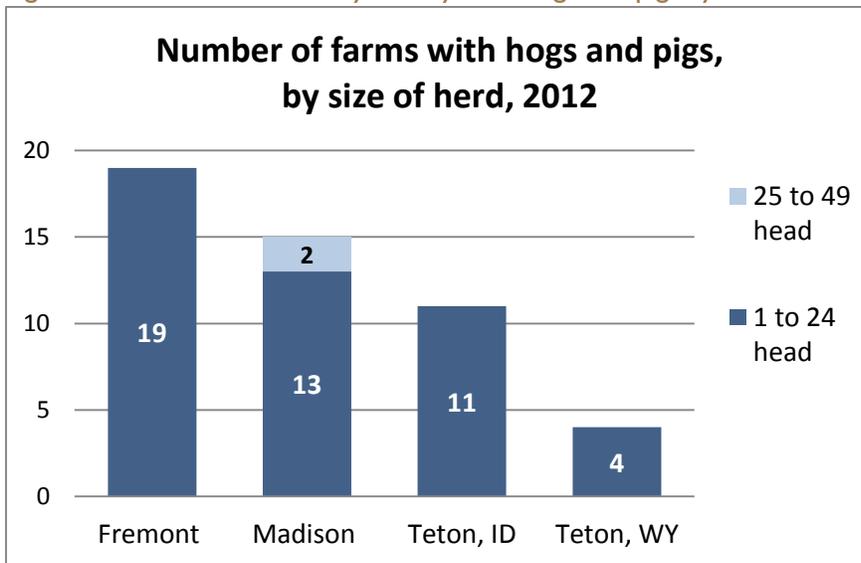
Only 49 farms in the study region raised hogs and pigs in 2012, a slight increase from 2007 when there were 41 (Figure 34). All of these farms have herds smaller than 50 animals (Figure 35).

Figure 34. Number of farms by county with hogs and pigs in 2007 and 2012



SOURCE: USDA

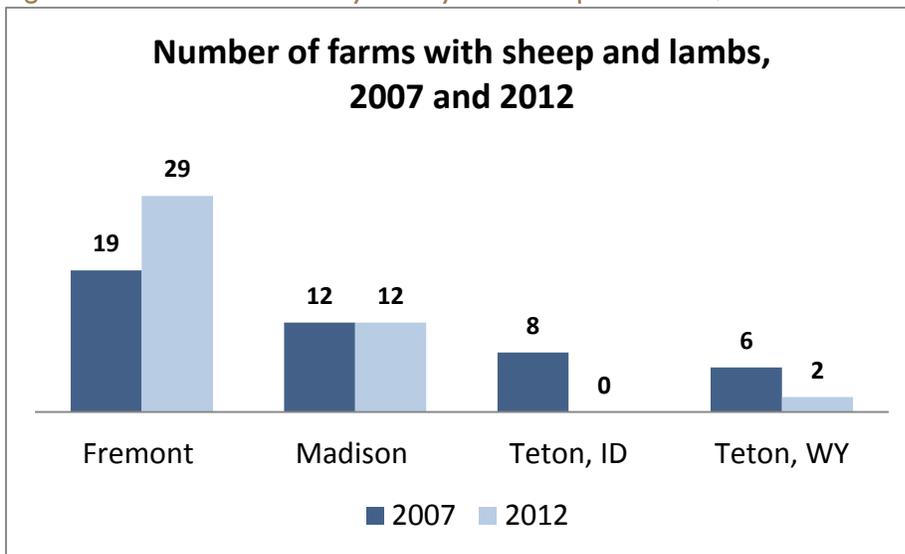
Figure 35. Number of farms by county with hogs and pigs by size of herd in 2012



SOURCE: USDA

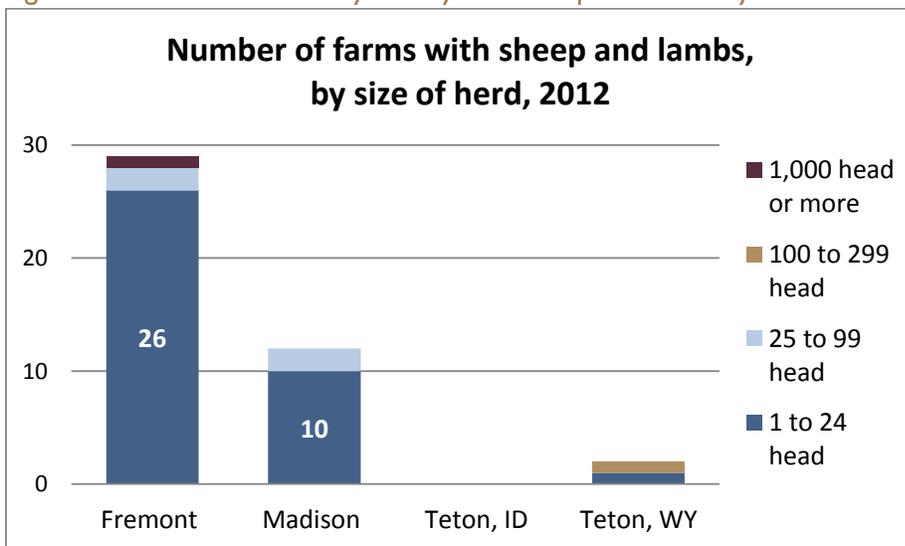
Between 2007 and 2012, the number of farms with sheep and lambs in the region decreased slightly from 45 to 43. While the number of farms decreased in both Teton counties, the number in Fremont County increased from 19 to 29 (Figure 36). Most of the study area's farms with sheep and lambs have herds smaller than 25 head. However, one farm in Teton County, WY, had between 100 and 299 head, and one farm in Fremont County had a herd larger than 1,000 head (Figure 37).

Figure 36. Number of farms by county with sheep and lambs, 2007 and 2012



SOURCE: USDA

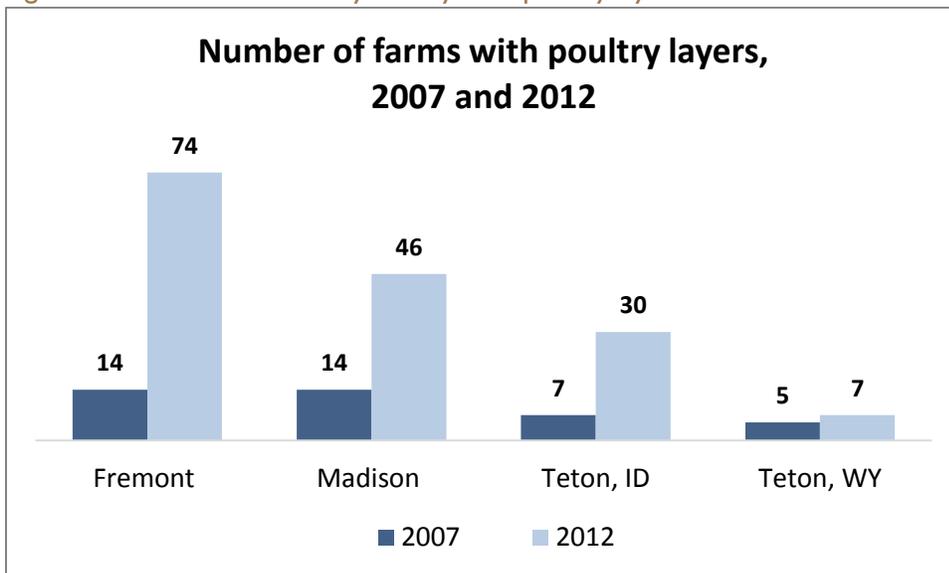
Figure 37. Number of farms by county with sheep and lambs by herd size in 2012



SOURCE: USDA

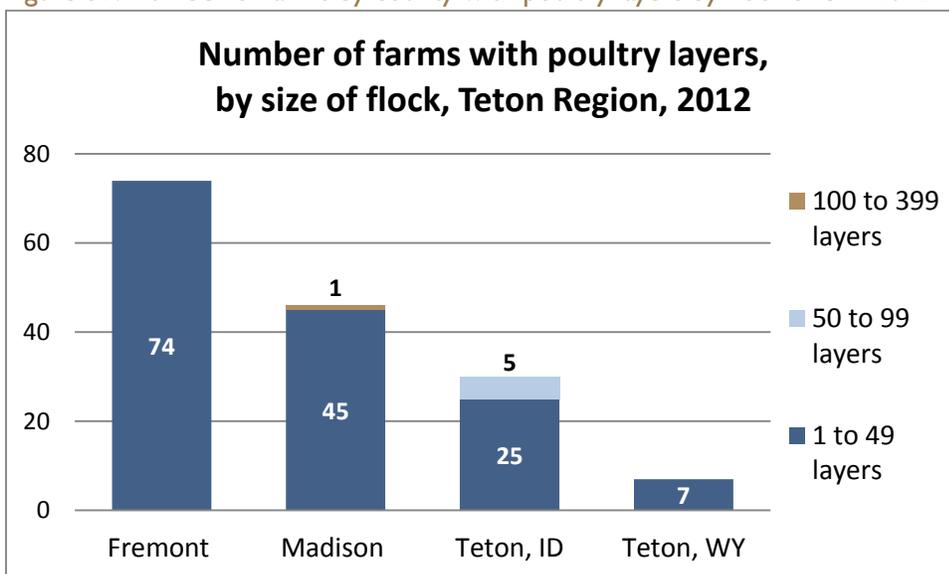
Between 2007 and 2012, the number of farms in the study region with poultry layers increased from 40 to 157, with most growth occurring in Fremont and Madison counties (Figure 38). Most farms had fewer than 50 layers, although one farm in Madison County had more than 100 and five farms in Teton County, ID had between 50 and 99 layers (Figure 39).

Figure 38. Number of farms by county with poultry layers in 2007 and 2012



SOURCE: USDA

Figure 39. Number of farms by county with poultry layers by flock size in 2012



SOURCE: USDA

Producer survey, interview, and focus group results

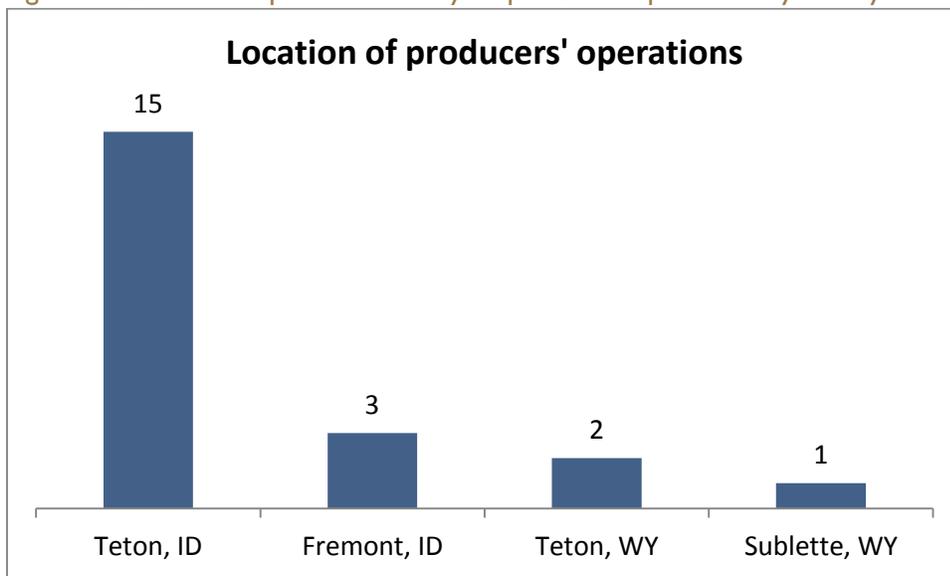
Primary data collected through surveys, interviews, and focus groups provide an on-the-ground view of the local and regional food systems. Together with the secondary data, these findings create a more accurate and nuanced understanding of local producers and potential demand. In fact, primary data show local producers are raising a wider variety of crops than indicated in the USDA Agricultural Census.

Compared to all producers in the study area, survey participants are over-represented by producers in Teton County, ID, producers with small acreage, and producers who sell direct-to-consumer.¹⁹ However, since this study is focused on learning more about producers interested in selling their products locally, information provided by this particular set of participants is instructive.

Producer survey: Farm characteristics

A large number of producer survey respondents have operations in Teton County, ID, and one producer operates outside of the area (Figure 40).

Figure 40. Location of producer survey respondents' operations by county

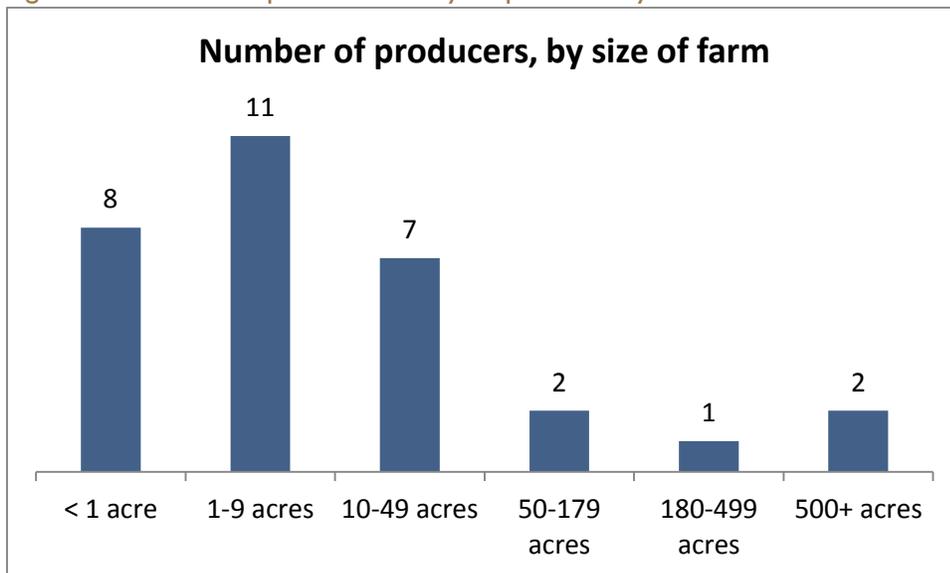


SOURCE: Producer survey

Among respondents to the producer survey, 19 out of 31 have small operations with fewer than 10 acres. Only two respondents have operations larger than 500 acres (Figure 41). Survey respondents represent operations that range from very small to large. Out of 22 respondents who answered the question, 10 have an annual average gross value of sales less than \$10,000, and 3 have an annual average gross value of sales of \$250,000 or greater (Figure 42).

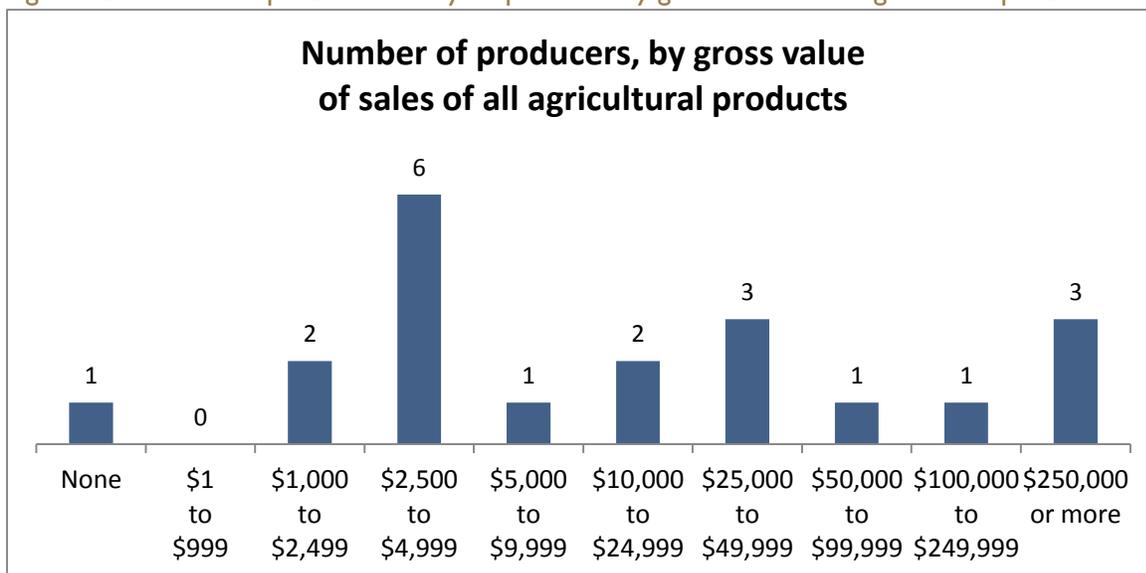
¹⁹ Compared to USDA 2012 Agricultural Census data.

Figure 41. Number of producer survey respondents by farm size



SOURCE: Producer survey

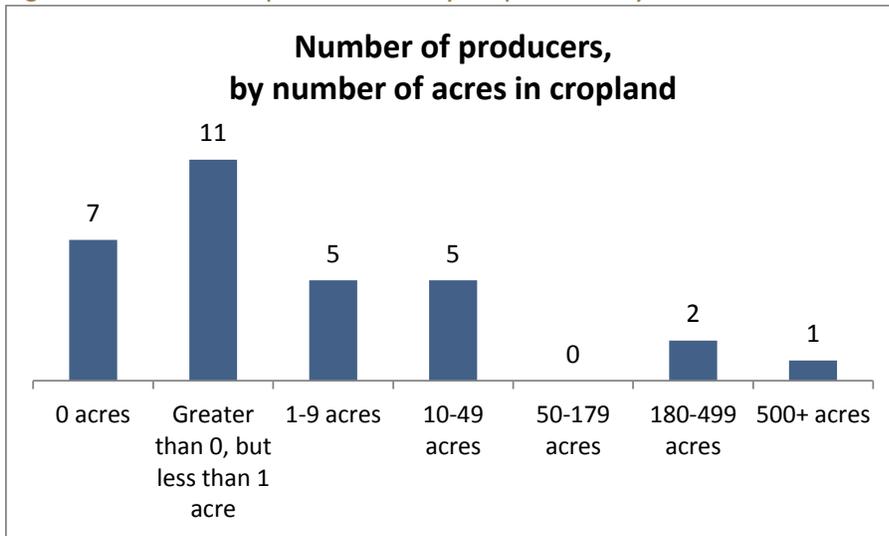
Figure 42. Number of producer survey respondents by gross value of all agricultural product sales



SOURCE: Producer survey

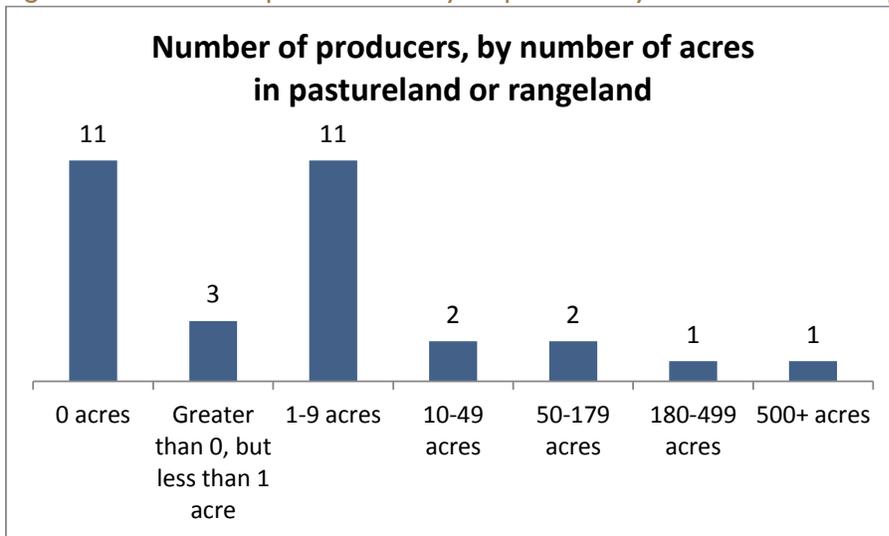
Few producer survey respondents focus solely on crop or livestock production. Out of 31 respondents, 24 have at least some cropland, and 20 have at least some pastureland or rangeland, which means many have both. Most producers with cropland have small crop operations: 11 have less than 1 acre devoted to crops, and 5 have plots between 1-9 acres. Only 1 producer has more than 500 acres in cropland (Figure 43). Among producers with pastureland or rangeland, 11 have plots between 1-9 acres, and the rest are spread fairly evenly from very small to very large livestock operations (Figure 44).

Figure 43. Number of producer survey respondents by number of acres in cropland



SOURCE: Producer survey

Figure 44. Number of producer survey respondents by number of acres in pastureland or rangeland

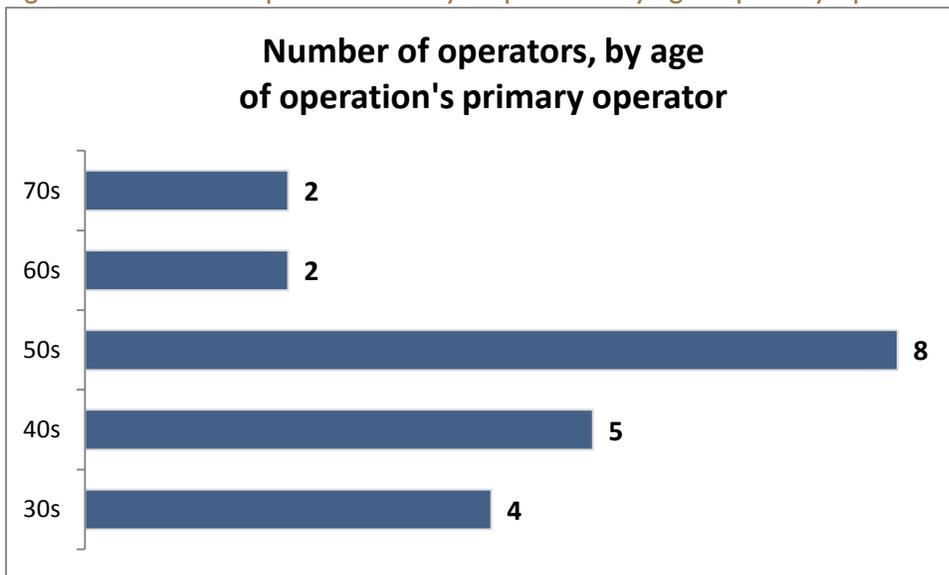


SOURCE: Producer survey

Producer survey: Operator characteristics

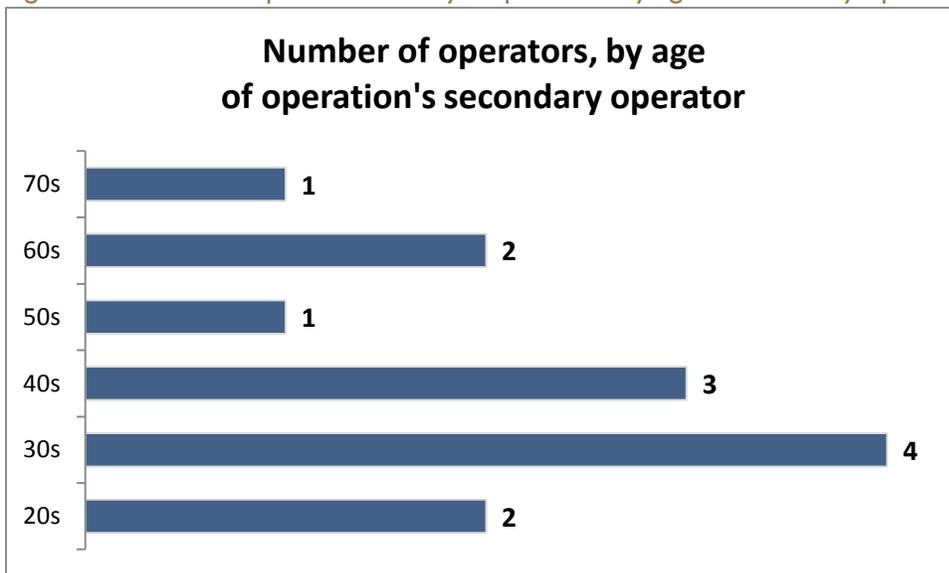
More than half of the respondents (12 out of 20) have operations with both a primary and secondary operator. Primary operators are evenly split between male and female producers, and most are in their 40s or 50s (Figure 45). Secondary operators are evenly split between male and female producers, and many are in their 30s or 40s (Figure 46).

Figure 45. Number of producer survey respondents by age of primary operators



SOURCE: Producer survey

Figure 46. Number of producer survey respondents by age of secondary operators



SOURCE: Producer survey

Producer survey: What do producers currently produce locally?

A little more than half of all producer survey participants (19 out of 31) grow vegetables, fruits, nuts, or berries. Figure 47 details the types of produce sold by local farmers, as well as the wide range of amounts sold in an average year. Several farmers sell produce not listed in the survey, including beets, cucumbers, garlic, herbs, plums, and rhubarb. One respondent with an operation that specializes in tomatoes reported selling 80,000 lbs. of tomatoes in an average year. None of the survey respondents raises blackberries, blueberries, melons, peaches, pecans, or sweet corn. Data collected through surveys, interviews, and focus groups suggest more

producers grow these fruit and vegetable crops than indicated in the Agricultural Census. For example, according to the Agricultural Census, no producers grow leafy greens in the study area; however, seven producer survey participants reported growing leafy greens.

A greater diversity of crops is grown in the region than some study participants (including producers, buyers, and key informants) perceive, which could influence and limit the market for local food and agricultural products. For example, as the following two food buyers from Madison County conveyed, some buyers do not know what is available locally, or expressed the belief that the products grown locally are limited:

What do we grow locally here? We [buyers are] probably unaware – I know we grow potatoes and we grow seed potatoes and we grow alfalfa, but I don't know what else is out there. (Institution, Madison County)

There's all this talk about buying locally grown food, serving locally grown food. And that's great but, gosh, there's just not—we have just a few products we can grow here because of our season. (Institution, Madison County)

We elaborate on buyers' perspectives on the challenges of sourcing local products below.

Figure 47. Number of producer survey respondents selling selected vegetables, fruits, nuts, or berries by amount sold

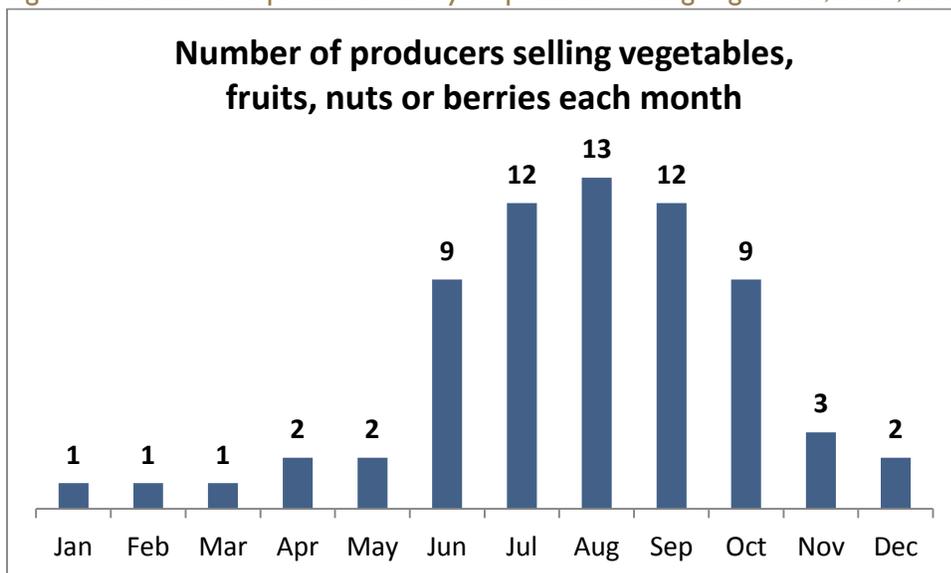
Product	Number of producers	Range of amount sold
Apples	2	40-50 lbs.
Carrots	7	10-2,000 lbs.
Cherries	1	5 lbs.
Grapes	1	25 lbs.
Green beans	7	8-500 lbs.
Leafy greens	7	10-3,000 lbs.
Onions	4	5-1,000 lbs.
Peas, green	7	5-700 lbs.
Pears	1	30 lbs.
Peppers	1	3 lbs.
Potatoes	4	20-8,000 lbs.
Raspberries	5	3-240 lbs.
Strawberries	3	1-100 lbs.
Squash	6	10-3,000 lbs.
Tomatoes	9	5-80,000 lbs.

SOURCE: Producer survey

In addition to asking producer survey participants what and how much they grow, we also asked them to report when they have products available. While the majority of producer survey participants grow and sell produce during the traditional growing season, some have an

extended growing season, and one sells produce year-round (Figure 48). For example, one producer who said they sell products year-round grows carrots, green beans, leafy greens, squash, tomatoes, and garlic, although we do not know which of these products they sell in the winter months.

Figure 48. Number of producer survey respondents selling vegetables, fruits, nuts, or berries by month



SOURCE: Producer survey

Less than a third of all respondents (10 out of 25) produce field crops, but only a limited number of types: hay, herbs, and lavender (Figure 49). Hay is the most widely grown field crop. None of the survey respondents raises barley, dry beans, canola or other oilseeds, corn for grain, corn silage or green chop, dry peas or lentils, hops, oats, sugar beets for sugar, or wheat.

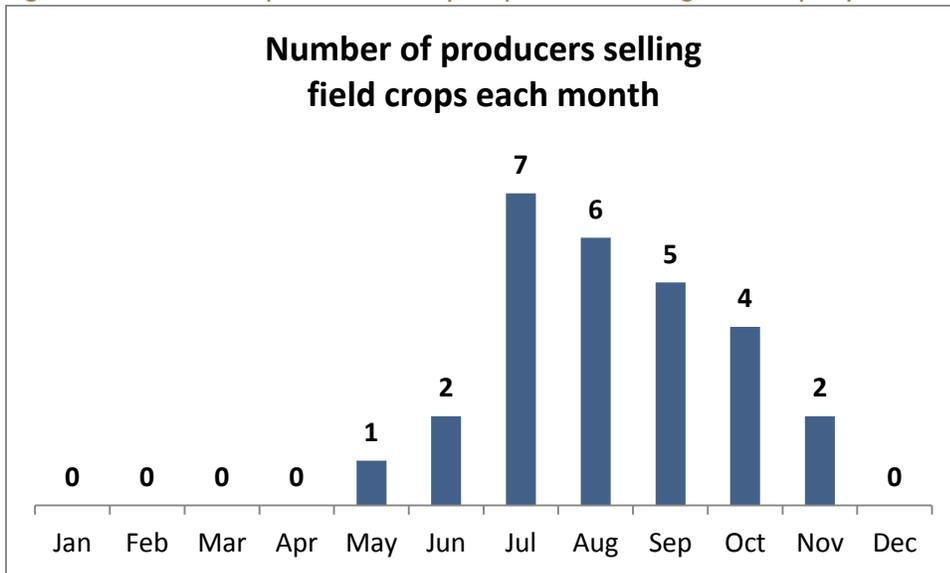
Figure 49. Number of producer survey respondents selling field crops by amount sold

Field crop	Number of producers	Range of amount sold
Hay	6	3-2,500 tons
Herbs	3	1-700 lbs.
Lavendar	1	6,000 bunches

SOURCE: Producer survey

Producer survey respondents growing field crops sell from May to November, with a peak in the summer months (Figure 50).

Figure 50. Number of producer survey respondents selling field crops by month



SOURCE: Producer survey

Less than a third of all respondents (10 out of 25) produce livestock or milk. Figure 51 details the types and range of amounts of livestock and milk products sold by producers taking this survey in an average year. None of the survey respondents produce elk meat.

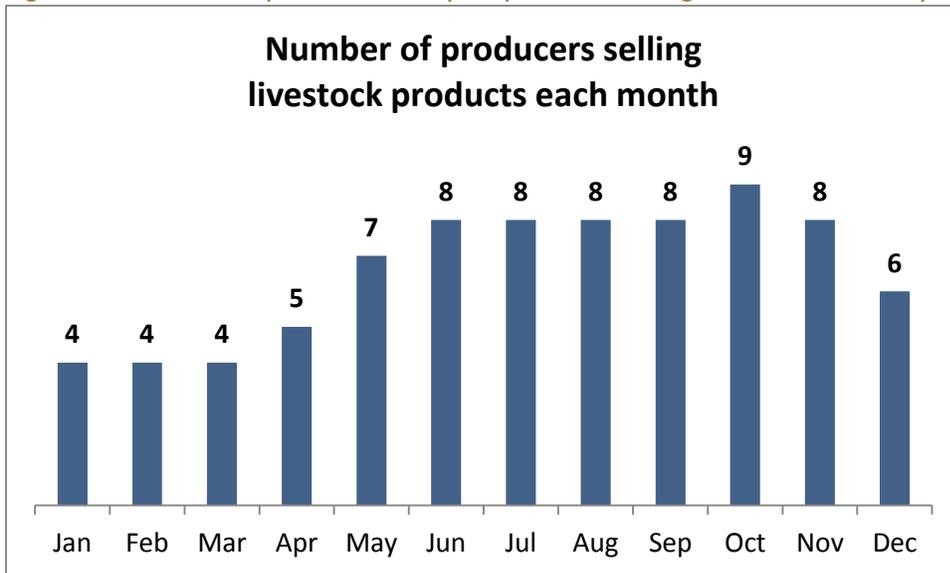
Figure 51. Number of producer survey respondents selling livestock or milk by amount sold

Livestock and milk products	Number of producers	Range of amount sold
Beef cows	5	1-225 head
Cow's milk	1	2,000-2,500 lbs/day
Hogs and pigs	2	2-20 head
Sheep and lambs (meat)	2	1 head
Goats and kids (meat)	3	2-6 head
Goat's milk	5	10-8,700 lbs.

SOURCE: Producer survey

Summer and fall are the peak seasons for selling livestock and livestock products. Producers who sell products year-round include those selling hogs and pigs, goats, and goat and cow milk (Figure 52).

Figure 52. Number of producer survey respondents selling livestock or milk by month



SOURCE: Producer survey

About a third of all respondents (9 out of 24) produce poultry products. Figure 53 shows the types of poultry products, as well as the range of amounts sold in an average year. The most common poultry product was chicken eggs, with 40-1,900 dozen sold in an average year.

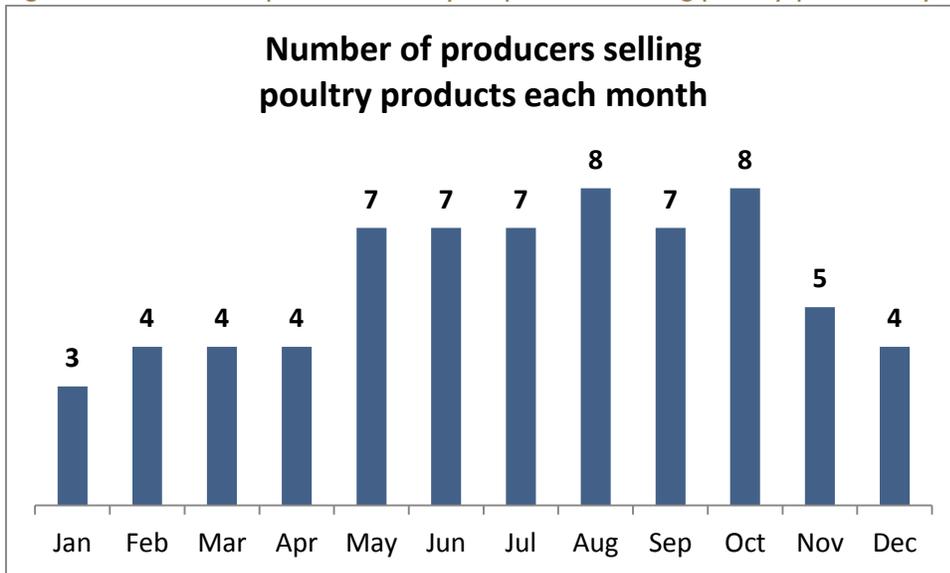
Figure 53. Number of producer survey respondents selling poultry products by amount sold

Poultry products	Number of producers	Range of amount sold
Broilers	2	20 chickens
Chicken eggs	7	40-1,900 doz.
Ducks	1	12 ducks
Duck eggs	1	20 doz.
Geese	1	6 geese
Goose eggs	1	12 doz.
Turkeys	2	3-10 turkeys

SOURCE: Producer survey

May through October is the peak season for selling poultry products. Producers who sell poultry products year-round are primarily those who sell chicken eggs (Figure 54).

Figure 54. Number of producer survey respondents selling poultry products by month



SOURCE: Producer survey

Several producers (11 out of 23) sell processed or value-added food products. The most common products sold include cheese, bottled milk, and jam or jelly (Figure 55). No survey respondents reported selling flour; however, one focus group participant expressed interest in milling locally grown grains to produce flour.

Figure 55. Number of producer survey respondents selling value-added products by product

Value-added food products	Number of producers
Cheese	5
Bottled milk	4
Jam/Jelly	4
Bread	2
Salsa	2
Yogurt	2
Pesto	1
Wine	1
Flour	0
Processed meat	0
Sour cream	0
Tortilla chips	0

SOURCE: Producer survey

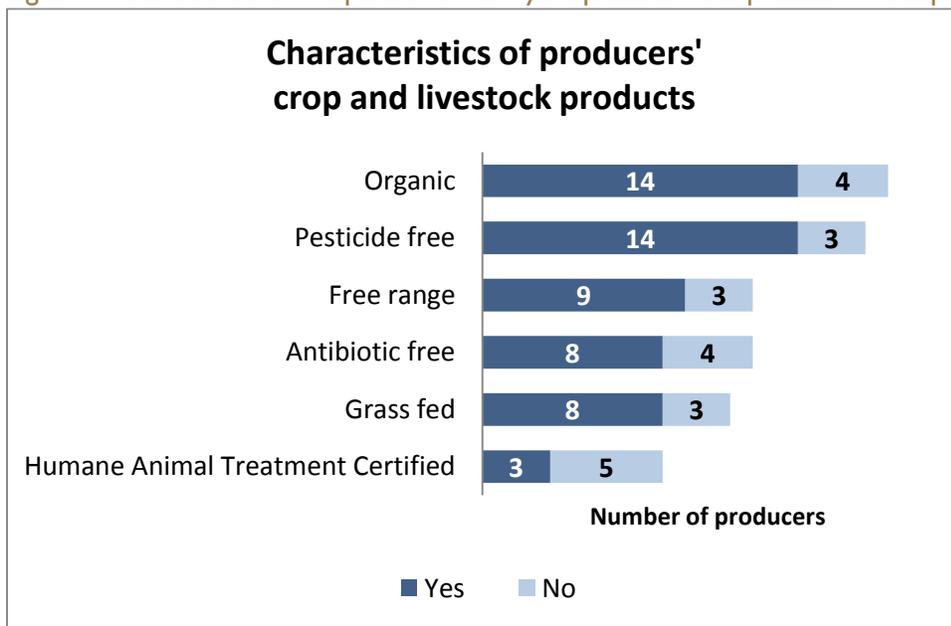
Honey, game animals, fiber products, and other secondary animal products were uncommon among this group of respondents. For example, only two produce 100-150 lbs. of honey in an average year, which they typically sell between June and December. None of the survey respondents produce game animals (e.g., deer, elk, quail, pheasant) for hunting on private

property or release on public lands, and none of them produce fiber products (e.g. wool) or other secondary animal products (e.g., antlers, horns, hides, leather, feathers) for sale.

Producer survey: special product characteristics

Most producer survey respondents grow organic or pesticide-free crop or livestock products (Figure 56). Many indicated they have products with other special characteristics not included in the survey. These characteristics include gluten free, natural, organic practices but not certified organic, and pasture-based milk.

Figure 56. Characteristics of producer survey respondents' crop and livestock products



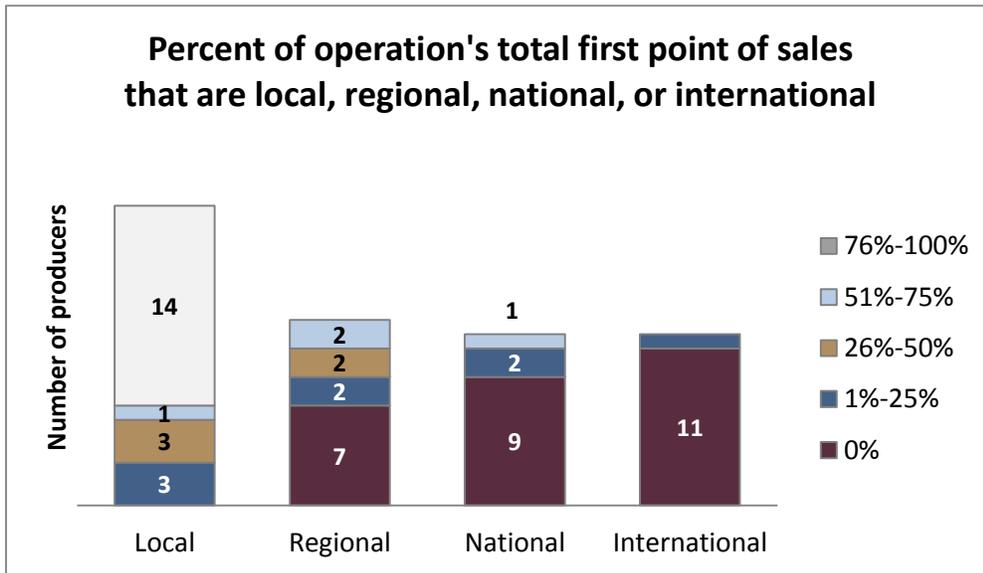
SOURCE: Producer survey

Producer survey: where do they currently sell and how?

Of those surveyed, most are interested in selling locally and regionally, and most are interested in increasing the quantity or variety of products they sell locally and regionally. More respondents said they are interested in selling locally than regionally, and perhaps more importantly, most said they have the capacity to increase the quantity and variety of products they sell locally or regionally.

All producer survey respondents have a local first point of sale for at least some of their products in an average year, and over half (14 out of 21) have a local first point of sale for 76-100% of their sales. Very few respondents have a national or international first point of sale, and only one makes more than 50% of their sales to a first point of sale outside of the region (Figure 57).

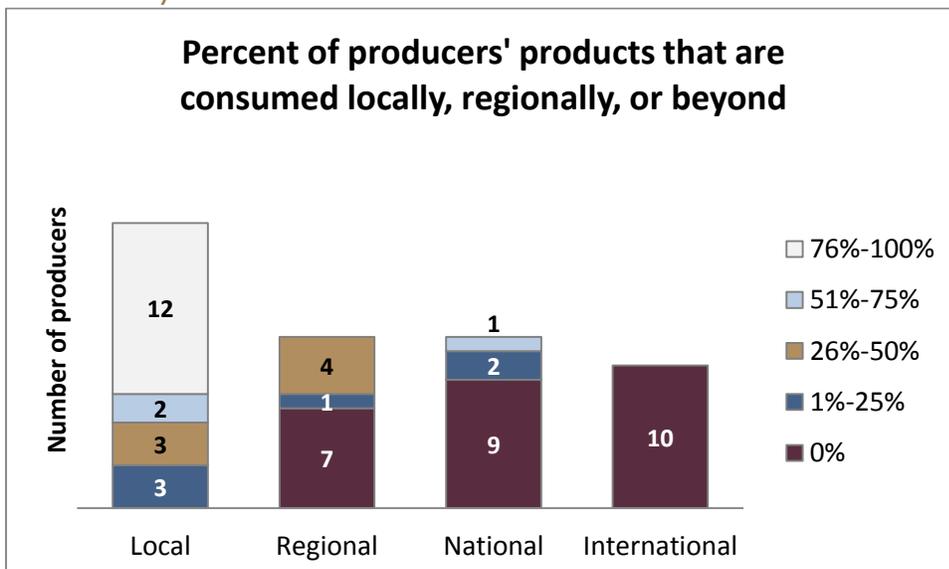
Figure 57. Percent of producer survey respondents' first point of sales that are local, regional, national, and international



SOURCE: Producer survey

When asked to estimate the percent of their products consumed locally, regionally, or beyond, all respondents estimated that at least a portion of their products are consumed locally in an average year. About half (12 out of 20) estimated that 76-100% of their products are consumed locally. Very few respondents estimated that their products are consumed outside of the region, and only one estimated that more than 50% of their products are consumed outside of the region (Figure 58).

Figure 58. Percent of producer survey respondents' products consumed locally, regionally, nationally, and internationally



SOURCE: Producer survey

When asked where their primary buyers are located, producer survey respondents listed several local and regional cities, towns, and counties (Figure 59).

Figure 59: Locations of producer survey respondents' primary buyers by number of respondents

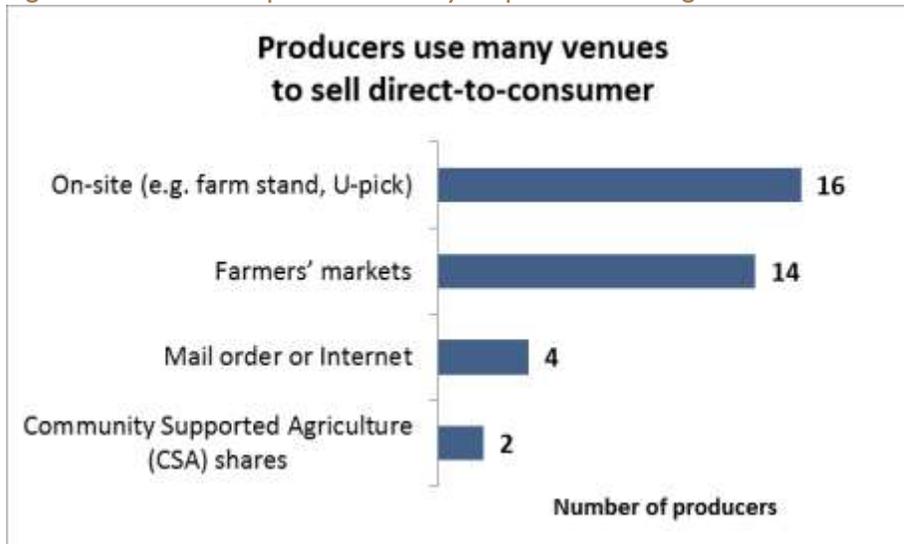
Local	Number of producers	Regional	Number of producers
Teton County, ID	6	Boise	1
Jackson	5	Twin Falls	1
Driggs	4	Eastern Idaho	1
Teton County, WY	4	West Yellowstone, MT	1
Victor	3	Bonneville County	1
Fremont County	3		
Tetonia	2		
Wilson	2		
Teton Valley	2		
Ashton	1		
Pinedale	1		
Madison County	1		

SOURCE: Producer survey

Producers use many options for selling their products, some of which include direct-to-consumer (20), direct-to-retail (13), and through wholesale markets (5).

Of the 20 producer survey respondents who sell direct-to-consumer, 16 sell on-site and 14 sell at farmers' markets (Figure 60). A few provide Community Supported Agriculture (CSA) shares (2) or sell via mail order or the Internet (4).

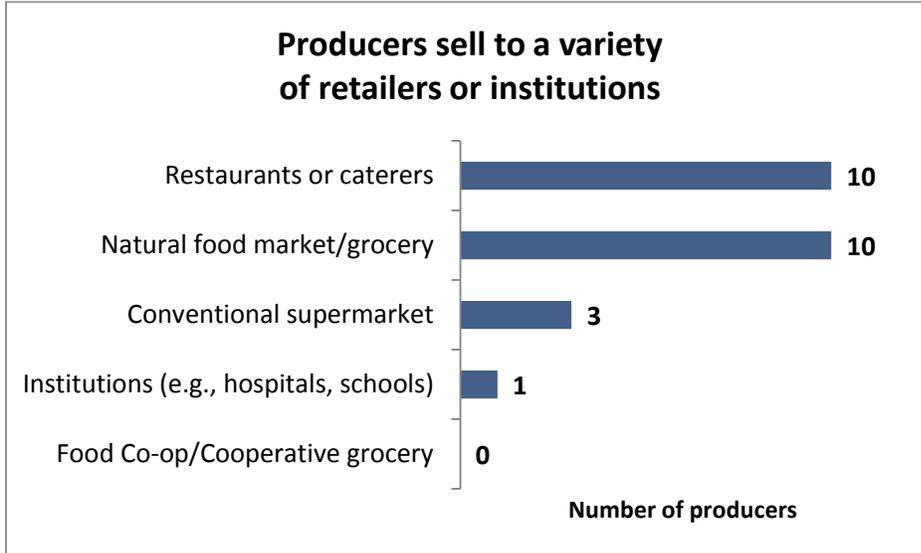
Figure 60. Number of producer survey respondents selling direct-to-consumer by venue



SOURCE: Producer survey

Of the 13 respondents who sell direct-to-retail, most sell to restaurants or caterers (10) or to natural food markets or grocery stores (10). Some also sell to conventional supermarkets (3) and institutions such as hospitals or schools (1). One respondent sells to local guest ranches. None of the respondents sell to food co-ops or cooperative grocery stores (Figure 61).

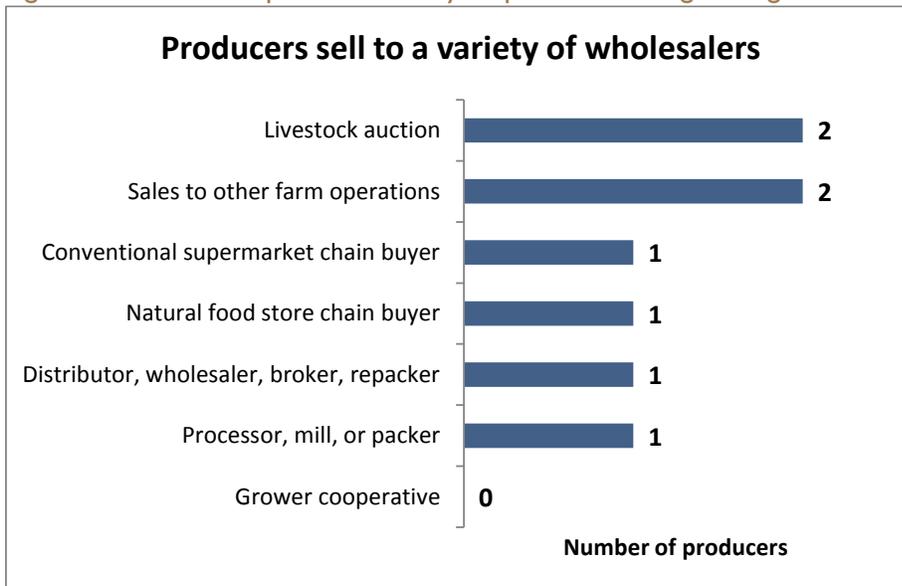
Figure 61. Number of producer survey respondents selling direct-to-retail by venue



SOURCE: Producer survey

Only five respondents sell to wholesale markets, using a variety of strategies, although none of them sells via a grower cooperative (Figure 62).

Figure 62. Number of producer survey respondents selling through wholesale markets by venue



SOURCE: Producer survey

Producers' interest in, perceived benefits of, and opportunities for selling locally or regionally

Producer survey respondents have a strong interest in selling products locally, with 19 of 21 expressing interest. The two respondents who said they are not interested in selling locally currently have a local first point of sale for at least some of their products, and both estimate that at least some of their products are consumed locally. Survey respondents expressed less interest in selling their products regionally, with 14 of 21 expressing no interest.

Many producer survey respondents (18 out of 23) are interested in increasing the quantity or variety of products they sell to local or regional markets, and many (19 out of 23) said they currently have the capacity to do so. Focus group and interview participants expressed interest in selling their products locally and regionally as well, and many said they already sell at least some portion of their products to local markets.

Primary benefits identified by participants give insight into the factors that motivate producers to participate in the local and regional food economies. In interviews and focus groups, producers discussed what they perceive as the primary benefits of selling their products to local markets. The key themes that emerged related to perceived benefits are listed in Figure 63.

Figure 63. Producers' perception of benefits of selling locally from focus groups and interviews

Producers' Perception: Benefits of selling products locally

- ◆ Economic development (e.g., keeps money in the community)
- ◆ Higher return to the producer
- ◆ Relationship with consumers (e.g., establish relationship and trust, educate on agriculture)
- ◆ Increased community understanding and support of agriculture and food chain
- ◆ Increased product quality (e.g., freshness, flavor)
- ◆ Lower transportation costs
- ◆ Environmental benefits (e.g., reduced transportation emissions)
- ◆ Food security and independence

One benefit producers cited most frequently is creation of opportunities for local economic development. This benefit includes providing higher economic return to local producers and keeping more money in their communities. For example, a producer in Teton County, ID, said,

I think the number one [benefit] is we're keeping money in our communities and creating living wage jobs for people who live here. People who live in California and trucking companies aren't getting a cut of it. You're paying your neighbor.

Another benefit of selling products locally frequently mentioned by producers is the opportunity to forge meaningful relationships with consumers. Producers talked about how important the relationship between farmers and consumers is in a locally oriented marketplace where buyer and seller are more likely to know each other and producers have a greater incentive to “keep customers happy because [the producers] want the return customer” (St. Anthony Focus Group Participant). At the same time, producers discussed the added challenges the local relationship with consumers can bring (Figure 65): “When you're selling locally you have to deal with people and there's always somebody who—it doesn't matter how good your product is—for them it is never good enough” (Producer, Fremont County).



While many producers agreed local buyers can be “vocal about what they do and don't like”

(Producer, Fremont County), many saw value in the opportunity to educate consumers about agriculture and to establish return customers, as is reflected by these farmers in Teton County, ID:

Producer 1: [I think the primary benefit of selling locally is] just connecting with our customers and being concerned about what they're eating.

Producer 2: Yup, and keeping our customers happy, being consistent and listening to what they're saying.

Producer 1: Yeah, we don't like to hear when they're unhappy with something we did. It doesn't happen very often, but it's always that 1% that's like 'oh man!'

As listed below (Figure 67 on page 53), one hurdle some producers said they face when selling to local buyers is the need for trust and commitment. For example, several focus group participants in St. Anthony said it can be difficult or risky for them to sell to local restaurants and institutional buyers who may order a large quantity of product only to pull out of the agreement once the farmer has already invested considerable time and financial resources:

[To sell to local buyers] you have to have a commitment that's solid, that doesn't fall through. We've done that where we've grown stuff, then as soon as it's ready it's 'oh never mind, we're not going to do that.' I mean we've grown 20 acres of pumpkins and we had somebody to sell them to and they totally fell through. (St. Anthony Focus Group Participant)

While several producers bemoaned aspects inherent to more personal relationships with consumers that come with selling products locally, the closer social networks and community relationships may also contribute to producers establishing dependable local markets.

Producers also described benefits such as higher product quality in terms of flavor and freshness (“It’s fresher and it tastes better.”—Producer, Teton County, ID) and lower environmental impacts (“It’s less resources to get here.”—Producer, Teton County, ID). Some producers (and buyers) emphasized the importance of promoting self-sufficiency and having resources available in their community in the case of an emergency:

I’m a bit of a survivalist. I am trying to help myself and my family and neighbors prepare for the future. We all know the country could have a major shakeup. (Producer, Madison County)

In addition, producers highlighted what they see as the primary opportunities and available assets for developing a locally and regionally oriented food economy in the study region (Figure 64). While recognizing barriers, some expressed excitement to build on the growing momentum of the local food system:

It’s come a long way. If you asked people about buying locally 20 years ago here, they would have just looked at you. People are way more ‘on it’ here than in a lot of other places. (Producer, Teton County, ID)

Additionally, producers saw the existing farmers’ markets as offering opportunity. As one Madison County-based producer said,

Idaho is comparatively a smaller populated state, especially in relation to other areas. But there is always opportunity. Especially with local farmers' markets becoming a bigger deal all the time.

Some producers emphasized consumer demand for transparency (e.g., food product tracking), local food products, high-quality food products, and products with special characteristics (e.g., organic, forage-fed, GMO-free, or free range) as presenting opportunities and market niches for local producers. The full list of themes related to producers’ perspectives on primary opportunities and assets is provided in Figure 64.

Figure 64. Producers' perspectives on opportunities and available assets for selling locally and regionally from focus groups and interviews

Producers' perspectives: local and regional food system opportunities and available assets

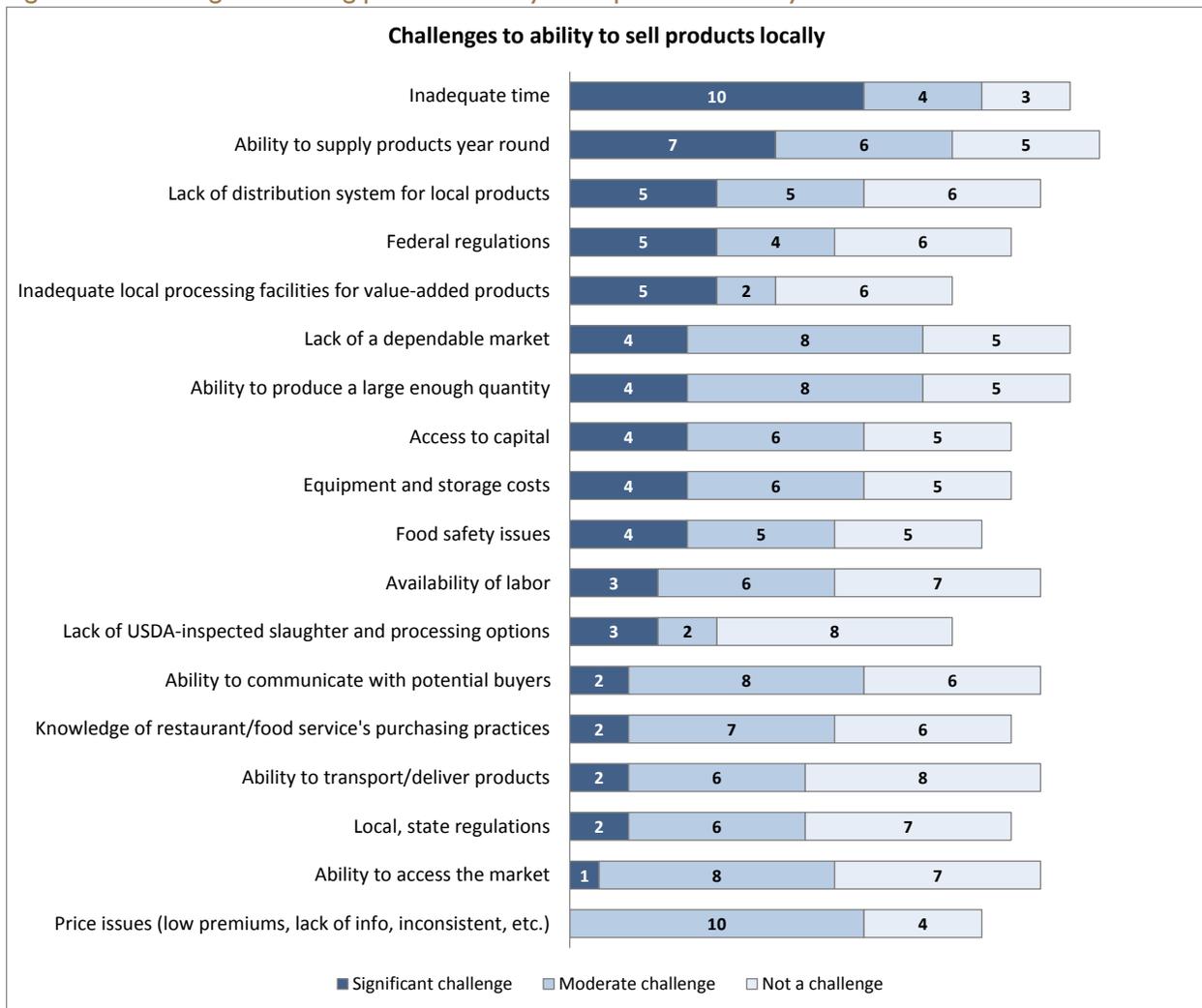
- ◆ Farmers' markets
- ◆ Local food system already has growing momentum
- ◆ Season extending infrastructure (e.g., hoop houses, greenhouses, row covers, walipinis)
- ◆ Demand for local products from restaurants, hospitals, grocers, and others
- ◆ Local nonprofit organizations (e.g., Slow Food in the Tetons or Full Circle Education)²⁰
- ◆ Producer organizations (e.g., Idaho Dairymen's Association or Idaho Beef Council)
- ◆ Trend toward product tracking and transparency
- ◆ Consumer demand for transparency and high-quality products
- ◆ Consumer demand for special attributes (e.g., organic) creates niches
- ◆ Consumer demand for specialty products (e.g., spelt, quinoa, or specialty meats)
- ◆ Affordable/manageable quantities of meat products (e.g., market smaller whole animals like hogs and sheep and sell larger animals in quarters and halves)
- ◆ Existing cooperatives to join or as models (e.g., Country Natural Beef or Idaho's Bounty)
- ◆ Livestock and produce brokers (e.g., producers who buy from other producers and act as point of aggregation and distribution)
- ◆ Population centers such as Idaho Falls, Jackson, Salt Lake City, Boise, Sun Valley, and Bozeman
- ◆ Potential demand from institutional buyers (e.g., correctional facilities), National Parks (e.g., Xanterra), and lodge companies
- ◆ Meat processors
- ◆ Commercial kitchen opening in Driggs
- ◆ Volunteers interested in learning about agriculture (e.g., from Jackson)
- ◆ Local expertise (e.g., experienced producers and UI Extension and UI researchers)

Challenges and barriers to selling agricultural and food products locally and regionally

Producers face many challenges to selling their products locally. On the producer survey, they listed *inadequate time* as a significant challenge most often, followed next by the *ability to supply products year-round* (Figure 65). The factors cited most often by producer survey respondents as not posing a challenge include a *lack of USDA-inspected slaughter and processing options* and *ability to transport or deliver products*. However, only about a third of producer survey respondents said they raise livestock; therefore, USDA-inspected slaughter and processing options likely was not counted among the top challenges due to the characteristics of survey respondents. USDA-inspected processing options did emerge as a key challenge according to livestock producers who participated in interviews and focus groups because producers were unaware of the USDA-inspected options available, because of the expense of processing, or because their operation is located a prohibitive distance from a processing facility.

²⁰ Refer to the 'Resources' section for more information about these organizations.

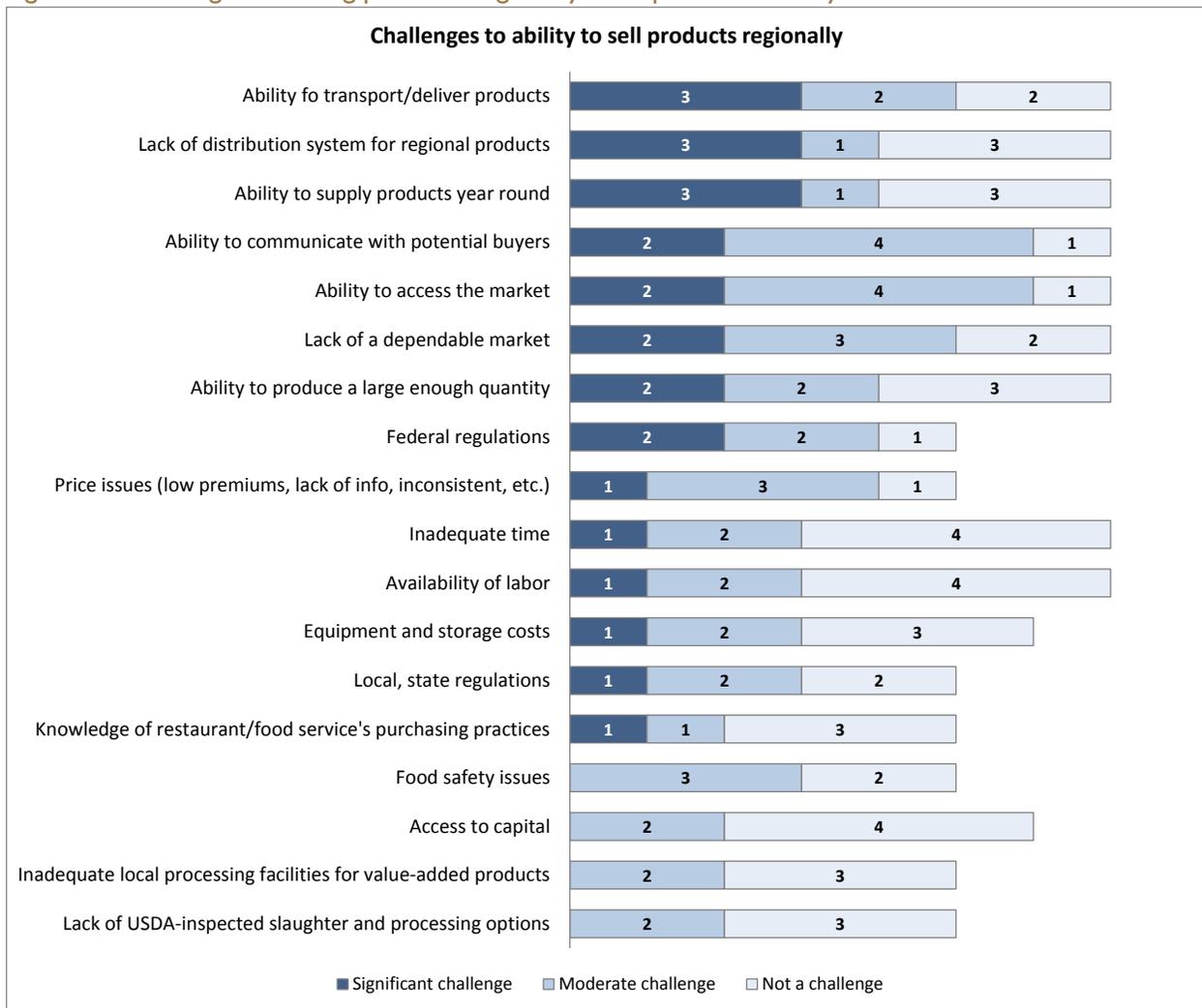
Figure 65. Challenges to selling products locally from producer survey



SOURCE: Producer survey

Producers also face challenges to selling their products regionally (Figure 66). The most significant challenges identified to selling regionally are related to accessing regional markets. Producers were just as likely to identify *lack of a distribution system for regional products* and *ability to supply products year-round* as significant challenges as they were to say these factors posed no challenge. Several producer survey participants also said the *ability to transport/deliver products regionally* was a significant challenge. The two challenges cited most often as a significant or moderate challenge include *ability to communicate with potential buyers* and *ability to access the regional market*. In contrast to what producers identified as the most significant challenge to selling products locally, the factor cited most often as not posing a challenge to selling regionally was *inadequate time*. This difference may reflect how time consuming it is for producers to direct market.

Figure 66. Challenges to selling products regionally from producer survey



SOURCE: Producer survey

General challenges for producers

Similar to the producer survey results, producer interviews and focus groups emphasized inadequate time and ability to supply products year-round as key themes. Participants explained that the time challenge is related to how long it takes producers to direct market to buyers and otherwise market products locally:

In the past we've provided recipes [to market our products], but as our business has been picking up at the [farmers'] markets, it's hard to have enough time to display our stand the way we'd like it. (Producer, Teton County, ID)

Inadequate time was a challenge for large- and small-scale producers alike (“We are just so busy doing what we're doing. You know, it's like heads down farming.”—Producer, Teton County, ID). Many larger scale producers (e.g., operations focused primarily on grain, potatoes, and other commodity crops) explained that their operations are not oriented towards selling at venues

such as a farmers' market, which requires someone to be onsite for many hours a day. Smaller scale producers (e.g., operations focused primarily on produce and value-added products) explained that time tends to be an issue for those with diversified operations:

I have goats and some chickens—goats for milk, cheese, and soap. I have a couple cows—some for meat for people who want to slaughter them or sometimes they have to go to the auction [if I need to] make money right away. And then [I have] a vegetable garden. We sell a few items at the farmers' market, like garlic, but it's kind of hard for me to do it all. (Driggs Focus Group Participant)

Interview and focus group participants often mentioned the small population in the region as a challenge since it limits demand for local food and agricultural products (“I don’t know that we have the population base to support a lot of the things that you hear about going on in other places”—Producer, Fremont County) as well as geographic conditions such as the short growing season and cold climate (“There are no frost-free months here”—Producer, Teton County, ID). Several producers, the livestock processor, and one key informant talked about producers’ willingness to try new practices, break from tradition, and take risk as the primary barriers to expanding participation in local and regional markets:



Our own mindset is the biggest barrier. We get into our comfort zone and it's hard to break down that barrier. We need to learn better how to think outside the box. We box ourselves in and fail to have vision for what is possible. If we could get out of the rut, we'd do better. (Producer, Madison County)

Some participants observed that many producers continue to run their operation the way they always have and thereby miss opportunities and become less competitive. One Madison County producer captured the theme saying, "It's amazing how many people still [think], 'my grandpa did it this way, my dad did it this way, [and so] I am going to do it this way.'" The USDA-inspected processor we interviewed also highlighted the need for producers and processors alike to be entrepreneurial:

I don't have a negative attitude about agriculture by any means. I am more enthused about agriculture than ever. And I think there are more opportunities than there ever

have been, but you gotta make them happen. You've got to be out there putting it together and say, 'I can make this work.' And have the tenacity to take the lumps and the bumps and figure out how to put it together. With technology there are things out there that are just waiting to be done, but you've got to make that happen.

Consumer willingness and ability to pay for locally sourced products also emerged as key challenges from the perspective of many interview and focus group participants. On one hand, producers said it is difficult to get a fair or adequate price for their products locally based on some consumers' willingness to pay:

Is anyone in here from Madison County? Am I allowed to say this? You're cheapskates! They'll go to WinCo to save \$.02 on tomatoes! I had someone stop by my fruit stand and say 'well, I can get them for 2 cents cheaper at WinCo, so I'll go there.' It's 40 miles to drive down there. (St. Anthony Focus Group Participant)

We price our stuff for what we think it's worth knowing the work and everything that went into it and people are like, 'it's expensive' and we're like, 'Tough. Sorry, we're not doing this for free.' (Producer, Teton County, ID)

In other cases the issue was less about willingness and more about some consumers' ability to pay: "Setting prices is hard because we don't want to keep certain people from being able to buy healthy food. That is a little bit tricky....Rich people aren't the only ones who have a right to eat well" (Producer, Teton County, ID).

Another key challenge that emerged from producer interviews, surveys, and focus groups is inadequate knowledge of the process needed to sell their products to different markets (e.g., direct-to-consumer or direct-to-retail): "We've had a hard time navigating all the permitting, licensing, and registrations. It's not laid out anywhere, you just have to figure it out through trial and error" (Producer survey participant).

Refer to Figure 67 for the full list of challenges that participants discussed.

Figure 67. Producers' challenges of selling locally and regionally: focus group and interview findings

General challenges for producers

- ◆ Lack of local demand (small population to create and sustain demand)
- ◆ Geographic conditions (e.g., short growing season, cold, products/varieties that grow)
- ◆ Producer attitudes/willingness to break from tradition, innovate, take calculated risk
- ◆ Transportation costs/Distance to markets
- ◆ Finding a niche
- ◆ Time constraints (e.g., for marketing)
- ◆ Producers' skillset
- ◆ Production costs (e.g., fuel, feed, labor, maintenance)
- ◆ Costs to become certified organic
- ◆ Closer relationship with consumers can add complexity
- ◆ Labor (ability to find, train, pay, and keep reliable farm employees)
- ◆ Lack of commitment from buyers; inconsistent/unpredictable demand
- ◆ Inability to supply products throughout year
- ◆ Ability to access land
- ◆ Consumer willingness/ability to pay price of local products
- ◆ Infrastructure (e.g., commercial kitchens or USDA-inspected poultry processing)
- ◆ Local cultural factors (e.g., perception that local food systems are for "hippies")
- ◆ Lack of state inspection options and too much demand for federal inspection
- ◆ Producer awareness of opportunities and available assets
- ◆ State and federal regulations (e.g., food safety) and knowledge of regulations

Challenges specific to small- and medium-sized produce growers

- ◆ Consumer demand focused on "choice" products (e.g., tomatoes or salad greens)
- ◆ Ability to produce large enough quantity
- ◆ Many consumers grow their own gardens
- ◆ Ability to find volunteers or people willing to participate in U-Pick
- ◆ Buyers' requirements (e.g., level of preparation or bar codes)
- ◆ Timing and coordination of farmers' markets

Challenges specific to livestock producers

- ◆ Distance to feedlots
- ◆ Cost of feed, grass can freeze
- ◆ USDA-inspected meat processing (options and producers' awareness of options)
- ◆ Distance to meat processors
- ◆ Producer sometimes makes less money selling whole animal locally
- ◆ Environmental factors (e.g., limited feed/grazing)
- ◆ Limited demand for lamb
- ◆ Demand for specific cuts of meat/meat products (what to do with rest of animal?)
- ◆ Consumer expectations (e.g., consistent texture and flavor)
- ◆ Consumer willingness/ability to buy a whole animal (especially a whole cow)
- ◆ Consumer ability to store a whole large animal

Challenges specific to small and medium produce growers

Some challenges emerged from the focus group and interview data specific to small and medium-scale produce growers (Figure 67). For example, several producers said consumer demand and the types and timing of produce that grow well in the study region climate are mismatched to some extent. A few producers said they wish greater demand existed for the produce they can supply and greater awareness on the part of consumers of the types of products available by season. These participants emphasized the need to educate consumers on not only the importance of buying locally but also the importance of buying in season. As one Teton County, ID, producer said,

There is demand just for the choice crops like tomatoes....Consumers need [to be] educated. They need to understand why it's important to buy local. That's the bottom line. We just need more people who are willing to eat kale and collards and not just come buy all the heirloom tomatoes and salad mix. We need more demand for the stuff that we can grow around here....What I would really like is for people to buy a CSA share, because then they would [understand] what grows well here. But I'd like it if they came up at the farmers' market and said, 'what do you have this week?' And it's all going to be great vegetables. But, you know, just getting people more in the habit of eating seasonally and not expecting the same veggies all year. (Producer, Teton County, ID)



Many producers said most local demand for produce is centered on tomatoes and salad mix. This perspective was supported by buyer survey results, which showed tomatoes and leafy greens as the top two vegetable products buyers said they are interested in buying locally (Figure 83).

According to some producers, demand for locally grown produce can also be a challenge in Fremont and Madison counties where many people grow their own garden:

People that are here [long term] and have money—most of them have their own garden. The only time they come to buy my stuff is when they had a disaster in their home garden. (Producer, Madison County)

Additionally, producers described the challenge of not being able to produce a large enough quantity or variety of products to meet demand from local markets: "I never have a hard time getting demand. My issues are being able to grow enough and getting enough land to do it. I've got places to market. It's just having enough" (Producer, Fremont).

Challenges specific to livestock producers

Some challenges were specific to producers who raise animals. For example, many livestock producers are either unaware of the USDA-inspected processing options available within the study area (see Figure 75 on page 64 for a list of USDA-inspected processors) or their operation is located a prohibitive distance from the USDA-inspected slaughter and processing that they need:

One thing that's limiting around here is we don't have a USDA-inspected plant. I think you have to go down to Utah or something if you want to do that. Everything selling to restaurants has to be USDA-inspected from what I understand. (Producer, Fremont County)

There's no poultry plant around here. You have to go to New Plymouth, Idaho. (Producer, Fremont County)

Another challenge described by livestock producers is consumers' ability to buy and store a whole animal, which is particularly relevant for those who primarily sell beef on the hoof (selling on the hoof does not require USDA-inspected processing). Some producers suggested a solution could be to sell animals in quarters and halves as an alternative to selling whole animals, or to sell smaller animals, like hogs, sheep, and goats, which are less expensive and require less storage space:

As far as beef goes, I don't even try [to market locally] unless I can sell half a dozen. Beef is getting so cost prohibitive. Gosh, this year it will be \$2,000 to buy the animal and another \$400-\$500 to process it. That's pretty hard for people to take out of their budget for the year. Now pork, I think there's a market for pork. You know, it's a lot more cost effective when it comes to \$150-\$200 for a pig to finish. That's a little more palatable for somebody to put in their budget. (Producer, Fremont County)

Relatedly, livestock producers described a challenge they encounter when selling to restaurants and other buyers who only want specific cuts of meat. If a buyer only wants one section of the animal, the producer is left to figure out where and how to sell the rest of the carcass.

What would help producers overcome challenges?

While they described many challenges they face to marketing and selling products to local buyers, producers also explained many actions and conditions that would make it easier for them to benefit from local market opportunities (Figure 68).

Figure 68. Producers' perspectives on what would make it easier for them to sell to local and regional markets

What would make it easier for you to sell products to local markets?

- ◆ Consumer education: why buy local, what grows well in the study region, how to prepare in-season vegetables and meats like sheep
- ◆ Biannual producer meetings to facilitate producer-to-producer learning and networking
- ◆ Training and education for farmers and beginning farmers (e.g., creating demand for products, marketing)
- ◆ Demonstrations of successes, opportunities, and other producers “thinking outside the box”
- ◆ More USDA-inspected meat processors (and increased awareness of existing USDA-inspected processors)
- ◆ More flexibility from restaurants and chefs (ability to incorporate seasonal produce into menus)
- ◆ Venue to connect producers to potential buyers and inform potential buyers of what is available locally and seasonally
- ◆ Cooperative advertising, marketing, aggregation, and distribution system(s)
- ◆ Formal farmers' market steering committees (at some farmers' markets)
- ◆ Paid position(s) to organize and coordinate farmers' markets
- ◆ Concise document explaining food safety, relevant regulations, and outlining steps necessary to sell food products to different types of buyers in ID and WY
- ◆ Extension outreach directed at small-scale/produce farmers

Local and regional buyers

Secondary data

Secondary data provide a broad picture of potential local food buyers. Figure 69 is an inventory of food-related businesses in the study region. A wide variety of restaurants, stores, caterers, wholesalers, and others could potentially buy from local producers. The businesses are organized according to industry categories as defined by the North American Industrial Classification System (NAICS). For more information about the types of businesses included in each category, visit the NAICS website: <http://www.naics.com/search/>.

Figure 69. Potential buyers: Number of food-related businesses in the study region by industry and county²¹

Number of food-related businesses, by type					
	Fremont	Madison	Teton, ID	Teton, WY	STUDY REGION
Accommodation and food services					
722320 Caterers	2	0	3	5	10
722410 Drinking Places (Alcoholic Beverages)	7	2	4	6	19
722511 Full-Service Restaurants	14	16	14	45	89
722513 Limited-Service Restaurants	4	29	9	23	65
Retail trade					
445110 Supermarkets and Other Grocery (except Convenience) Stores	5	6	0	7	19
445120 Convenience Stores	2	2	0	3	7
445210 Meat Markets	2	0	0	2	4
445230 Fruit and Vegetable Markets	0	1	0	0	1
445291 Baked Goods Stores	0	2	1	1	4
445292 Confectionery and Nut Stores	0	1	0	1	2
445299 All Other Specialty Food Stores	1	3	2	1	7
446191 Food (Health) Supplement Stores	0	2	1	2	5
Wholesale trade					
424410 General Line Grocery Merchant Wholesalers	0	1	0	1	2
424420 Packaged Frozen Food Merchant Wholesalers	0	1	0	0	1
424430 Dairy Product (except Dried or Canned) Merchant Wholesalers	0	2	0	1	3
424470 Meat and Meat Product Merchant Wholesalers	1	1	0	0	2
424480 Fresh Fruit and Vegetable Merchant Wholesalers	2	4	1	0	7
424490 Other Grocery and Related Products Merchant Wholesalers	0	3	0	4	7
424510 Grain and Field Bean Merchant Wholesalers	3	1	1	0	5
424520 Livestock Merchant Wholesalers	7	4	1	1	13
424590 Other Farm Product Raw Material Merchant Wholesalers	2	5	3	1	11
Food and drink manufacturing					
311340 Nonchocolate Confectionery Manufacturing	1	0	0	0	1
311351 Chocolate and Confectionery Manufacturing from Cacao Beans	0	1	0	0	1
311352 Confectionery Manufacturing from Purchased Chocolate	0	1	0	0	1
311422 Specialty Canning	0	1	0	0	1
311423 Dried and Dehydrated Food Manufacturing	0	1	0	0	1
311514 Dry, Condensed, and Evaporated Dairy Product Manufacturing	0	0	0	1	1
311611 Animal (except Poultry) Slaughtering	1	0	0	0	1
311612 Meat Processed from Carcasses	0	0	1	1	2
311811 Retail Bakeries	0	0	2	0	2
311812 Commercial Bakeries	0	1	0	1	2
311920 Coffee and Tea Manufacturing	0	0	0	1	1
311942 Spice and Extract Manufacturing	0	1	1	0	2
311999 All Other Miscellaneous Food Manufacturing	0	1	0	1	2
312130 Wineries	0	0	1	1	2
311111 Dog and Cat Food Manufacturing	0	0	0	1	1
311119 Other Animal Food Manufacturing	0	1	0	0	1

Source: InfoUSA

²¹ Data from InfoUSA may be incomplete. For example, the data show there are no supermarkets or other grocery stores in Teton County, ID, despite the presence of both Broulim’s Fresh Foods, and Barrels and Bins in Driggs.

Figure 70 and Figure 71 show the location and sales volume of restaurants, supermarkets and convenience stores in the study area. Not surprisingly, many of these types of businesses are concentrated around population centers and along the transportation network. In addition to the restaurants included in Figure 70, restaurants operate in Grand Teton and Yellowstone National Parks and at Grand Targhee Ski Resort located east of Alta, WY.

Figure 70. Distribution of restaurants by sales volume

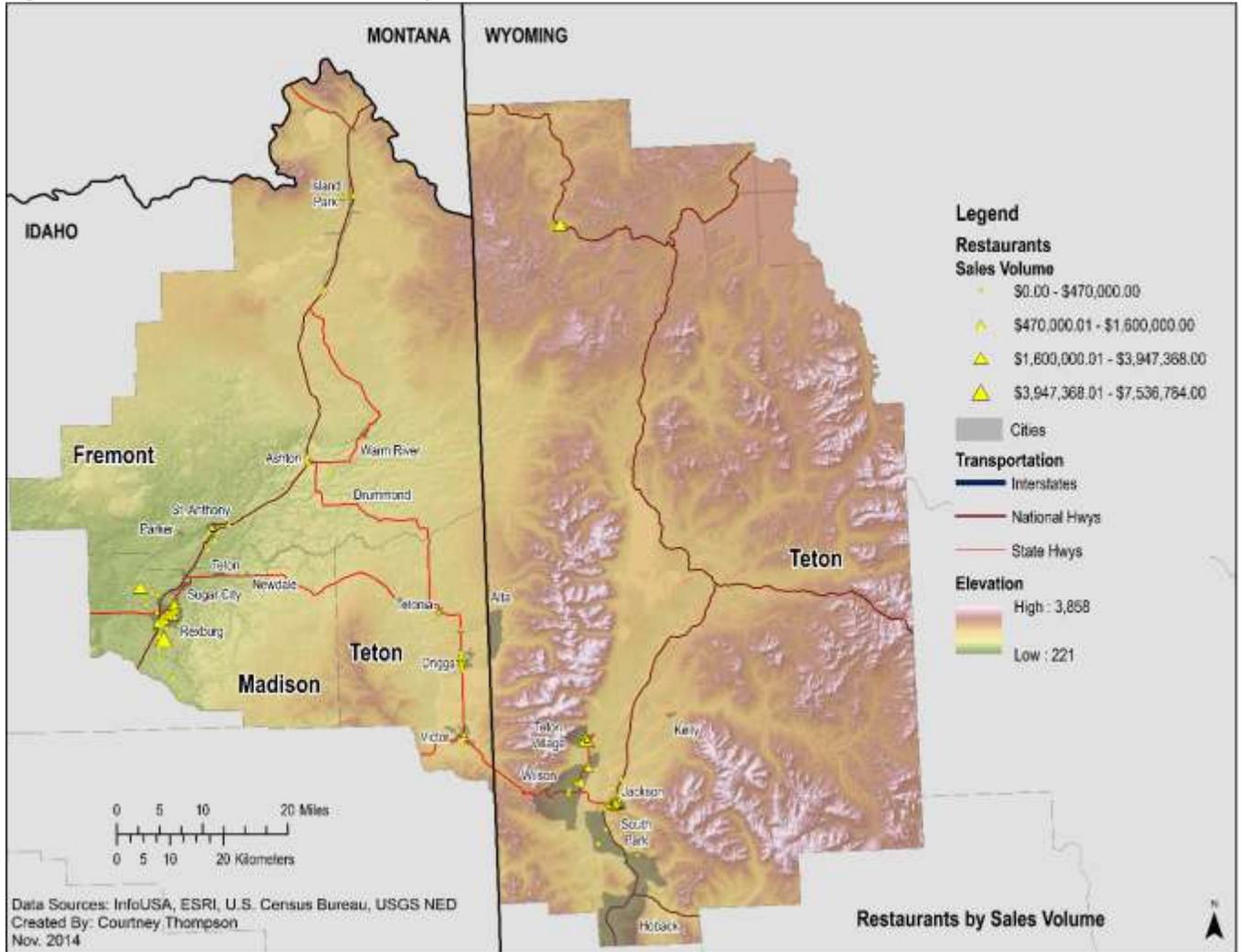
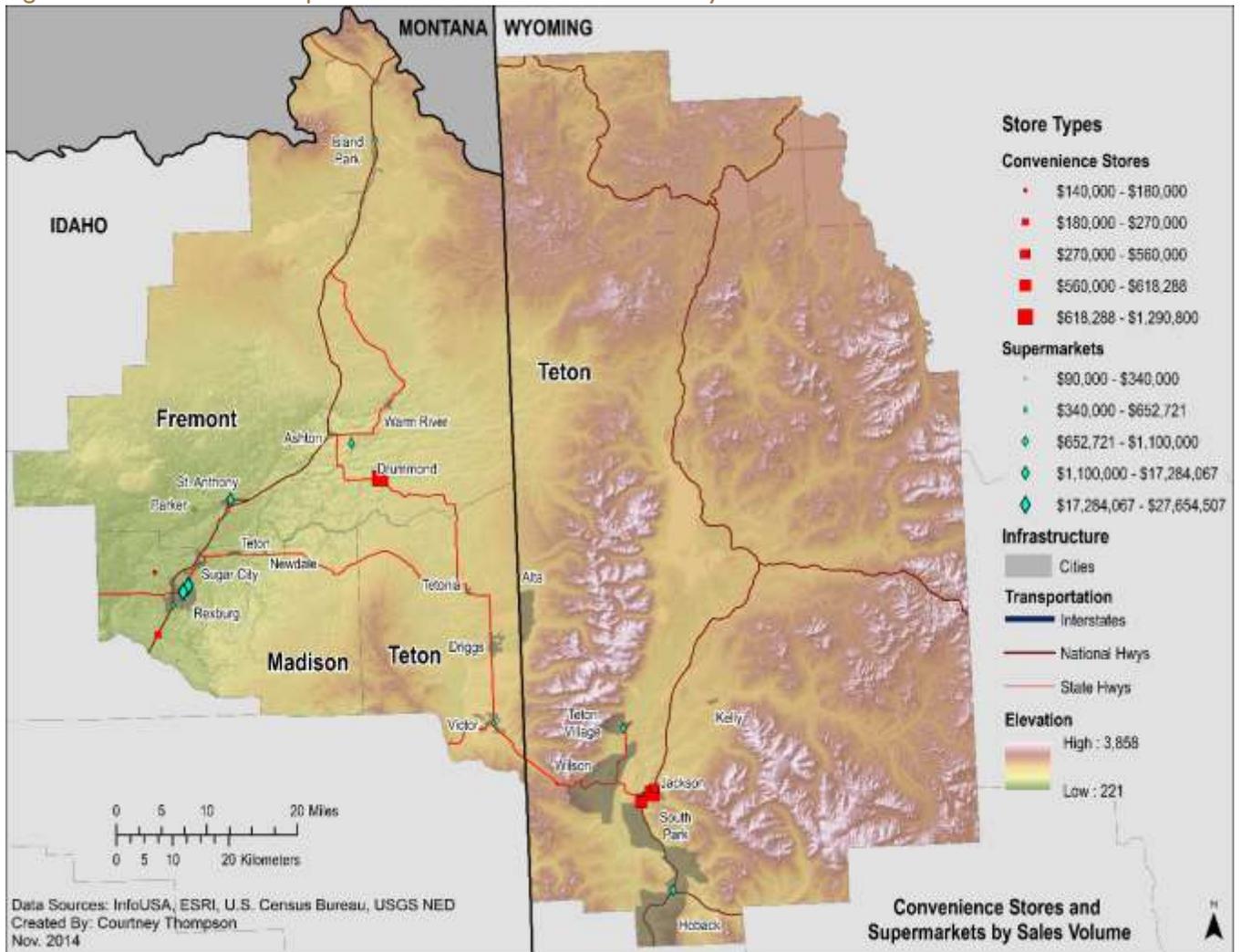


Figure 71. Distribution of supermarkets and convenience stores by sales volume



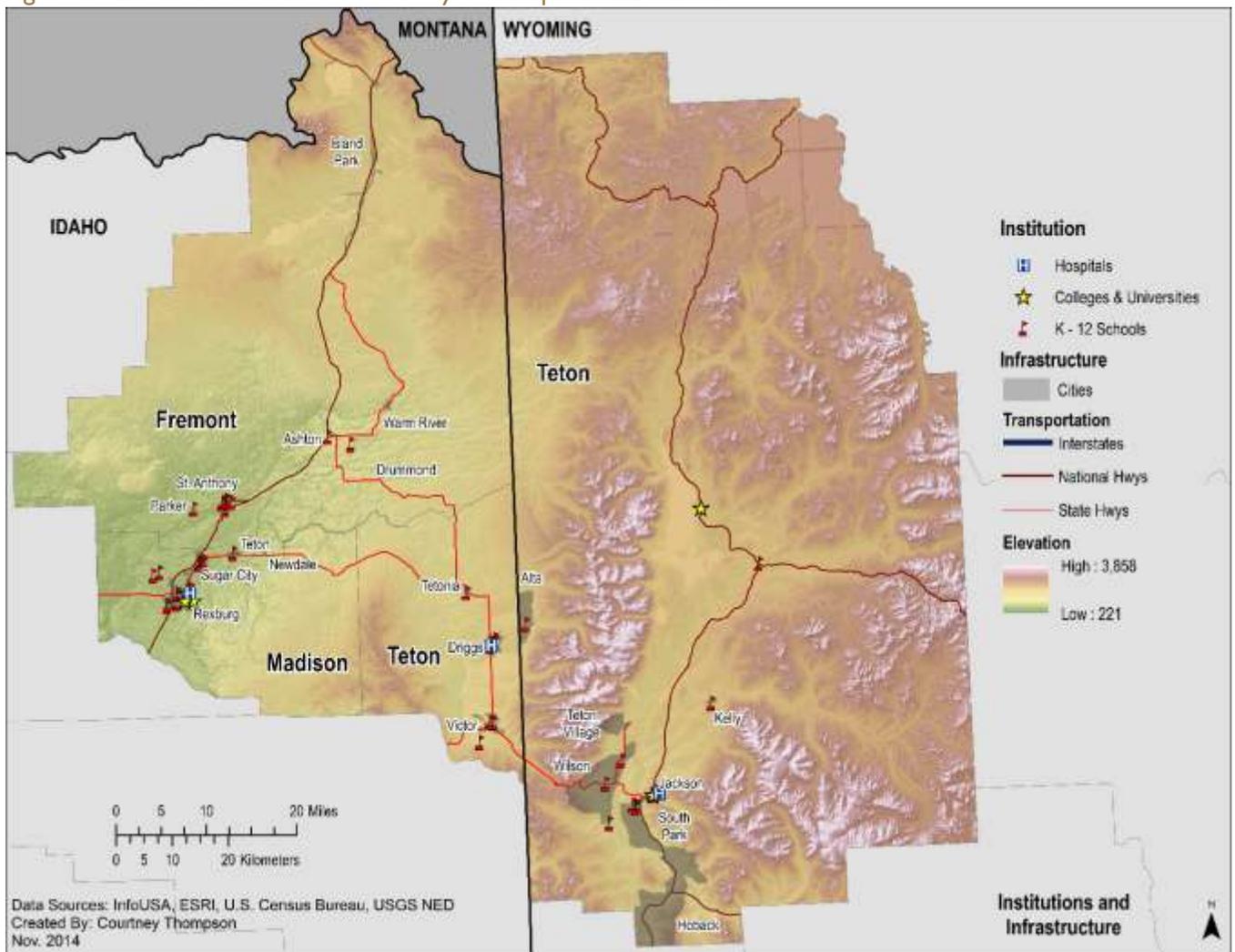
Other potential buyers in the study area include institutions such as schools, hospitals, care centers, and correctional facilities. Figure 72 shows a partial inventory of local institutions. Most of these institutions provide food for a large population. The area's public schools alone serve over 12,000 students. Figure 73 shows the location of the study area's hospitals and schools.

Figure 72. Potential buyers: institutions in the study region by county

Potential institutional buyers, by type					
	Fremont	Madison	Teton, ID	Teton, WY	STUDY REGION
Educational institutions					
K-12 public school districts	Fremont School District (10 schools and 2,312 students)	1) Madison District (11 schools and 4,937 students) 2) Sugar-Salem Joint District (5 schools and 1,464 students)	Teton County District (8 schools and 1,558 students)	1) Red Top Meadows (1 school and 11 students) 2) Region V Boces (1 school and 21 students) 3) Teton County School District #1 (9 schools and 2,449 students)	45 schools and 12,752 students
Colleges or universities		BYU-Idaho (16,000 students)			1 university
Health care institutions					
Hospitals		Madison Memorial Hospital		St. John's Medical Center	2 hospitals
Nursing homes and assisted living facilities	1) Ashton Living Center, NorthFork #146 2) Homestead Assisted Living Centers Inc of Saint Anthony	1) Rexburg Care and Rehabilitation Center 2) Teton Peaks Assisted Living 3) Homestead Assisted Living Centers Inc of Rexburg 4) Homestead Assisted Living at Carriage Cove 5) Heritage Homes of Rexburg	Teton Valley Residential Care Homes	1) St. John's Nursing Home 2) River Rock Lodge	11 nursing homes and assisted living centers
Correctional institutions					
All types	1) Fremont County Sheriff's Office and Jail 2) St. Anthony Work Camp 3) Juvenile Corrections Center - Saint Anthony	Madison County Jail	<i>Inmates are sent to Madison County Jail</i>	Teton County Detention Center	5 correctional institutions

Source: National Center for Education Statistics, BYU-Idaho, Idaho Department of Health and Welfare, and author's independent Internet search

Figure 73. Distribution of institutional buyers: Hospitals and schools



Farm-to-School data

K-12 public schools in the United States have shown a rapidly growing interest in purchasing food from local producers. The USDA's Farm-to-School Census surveys public school districts across the country. According to the survey, 63% of Idaho districts that already purchase local foods say they will buy more local food in the future.²²

Among districts participating in the survey, three are located in the study area: Fremont County Joint District, Madison District, and Teton County District (Idaho). According to the Farm-to-School Census, the biggest barrier to these districts' ability to buy local foods is finding key items year-round. These districts have experienced very few or no issues with product prices, delivery reliability, placing orders, or compliance with the district's purchasing regulations and policies (Farm-to-School Census). The Farm-to-School Census findings are consistent with

²² USDA, Food and Nutrition Service, The Farm to School Census, <http://www.fns.usda.gov/farmentoschool/census#/>; note that not all three districts answered all questions on the survey.

findings from buyer interviews in which participants highlighted the mismatch between the school year and the study region growing season. According to the secondary data, schools in these districts have purchased a wide variety of local products including milk, ground beef, cucumbers, tomatoes, mushrooms, pumpkins, apples, melons, and asparagus.

The Teton County School District estimates that about 10% of its total food cost was spent on local foods (Farm-to-School Census). This district has served food from a school-based garden or farm, conducted field trips to farms, and incorporated farm-to-school concepts in its educational curriculum.

Farmers' markets

Several farmers' markets occur in or near the study area:

- ◆ Farmers' Market on the Town Square, Jackson
Saturdays, July through early October, 8:00 a.m. to 12:00 p.m.
Contact: jhfmts@gmail.com
- ◆ Rexburg Farmers' Market, College Avenue, Rexburg
Fridays, May through mid-October, 4:00 p.m. to 8:00 p.m.
Contact: rexburgfarmersmarket@gmail.com
- ◆ Teton Valley Farmers' Market, in front of the Driggs Community Center on Main, Driggs
Fridays, end of June through early October, 9:00 a.m. to 1:30 p.m.
Contact: tetonvalleyfarmersmarket@yahoo.com
- ◆ Victor Farmers' Market, 60 East Main Street, Victor
Fridays, end of May through early October, 3:00 p.m. to 7:00 p.m.
Contact: <http://www.victorcityidaho.com/content/victor-farmers-market-1>
- ◆ Idaho Falls Farmers' Market, 501 Broadway in the Key Bank parking lot, Idaho Falls
Saturdays, end of April through end of October, 9:00 a.m. to 1:00 p.m.
Contact: idahofallsfarmersmarket@gmail.com, 208-339-3230

Livestock processing

To sell their products locally, livestock producers must have access to slaughter and processing facilities within a reasonable distance. There are several local and regional options for small-scale meat processing. Figure 74 shows the location of slaughter houses and meat and dairy processing facilities in the study area. Figure 75 lists regional USDA-inspected slaughter and processing facilities.

Figure 74. Processing options in the study region

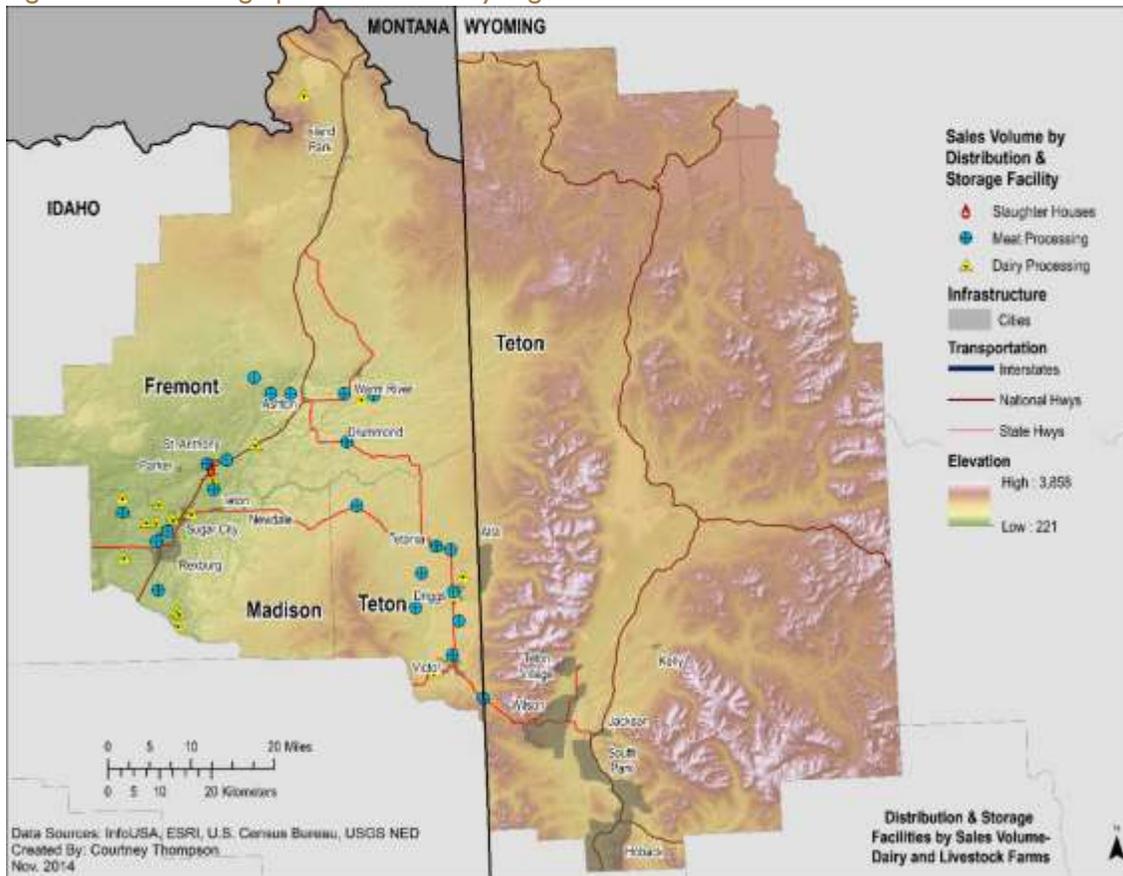


Figure 75. USDA-Inspected Facilities, current as of November 3, 2014

Establishment Number	Company	Street	City	ST	Zip	Phone	Grant Date	Activities	DBAs
M11027-V11027	Rammell Valley Pack	7080 N. 3000 W.	Tetonia	ID	83452	(208) 456-2546	9/8/1999	Slaughter, Processing	Rammell Valley Pack
M7722-P7722-V7722	Jones Meat & Food Services, Inc.	423 North Yellowstone Hwy	Rigby	ID	83442	(208) 745-6523	12/6/1995	Slaughter, Processing	
M11070-P11070-V11070	Mickelsen Packing Co.	2011 Riverton Road	Blackfoot	ID	83221	(208) 785-0860	6/5/1997	Slaughter, Processing	
M226-P4863-V226	Independent Meat Company	2072 Orchard Drive East	Twin Falls	ID	83301	(208) 733-0980	3/15/1983	Slaughter, Processing	Falls Brand, Salmon Creek Farms
M20290-P20290-V20290	Targhee Brands, Inc.	8149 South 600 East	Rexburg	ID	83440	(208) 359-2710	3/30/1998	Processing	
M8112-P8112-V8112	Commons Wholesale Meats	530 West 20th Street	Idaho Falls	ID	83402	(208) 522-4804	3/12/1990	Processing	Great Western Foods
M6076-P6076-V6076	Glenwood Smoked Turkey	4491 North Haroldsen Drive	Idaho Falls	ID	83401	(208) 529-9851	4/10/1989	Processing	Glenwood Smoked Products, Inc.
M6220-P6220-V6220	Intermountain Natural, LLC	737 S. Capital Avenue	Idaho Falls	ID	83402	(208) 227-9000	4/14/2011	Processing	Golden Valley Natural
M34719-P34719-V34719	Intermountain Natural, LLC	1740 S. Yellowstone Hwy.	Idaho Falls	ID	83402	(208) 227-9000	8/30/2008	Processing	Golden Valley Natural
M11072	Doug's Wholesale Meats	907 So. State	Shelley	ID	83274	(208) 357-7281	6/26/1981	Processing	
M11023-P11023	VTA, Inc.	758 South Main	Pocatello	ID	83204	(208) 232-5559	3/24/2008	Processing	Butcher Block
M11023-P11023	VTA, Inc.	758 South Main	Pocatello	ID	83204	(208) 232-5559	3/24/2008	Processing	Butcher Block
M18205-P18205	Heinz Frozen Food Company	221 Ore-Ida Court	Pocatello	ID	83202	(208) 235-4800	2/3/2011	Processing	All American Gourmet Co., Continental Delights, Inc., Foodways National, Inc., Gourmet Food Co., H.J. Heinz Company, Ore-Ida Foods, Inc., Weight Watchers
M18535-P18535	Big Lost River Meats	410 Pine Street	Mackay	ID	83251	(208) 588-3085	4/26/2012	Processing	
G31557	Walton Feed Inc.	29337 Highway 89	Montpelier	ID	83254	(208) 847-3357	10/19/2011		Rainy Day Foods
00226A M	Independent Food Corp.	3077 Eldridge	Twin Falls	ID	83301	(208) 733-0980	1/4/2000	ID Warehouse	
M39999-P39999	Rite Stuff Foods	2155 S. Lincoln Avenue	Jerome	ID	83338	(208) 324-8410	3/1/2012	Processing	
M44099	Ridley's Family Markets	621 Washington Street S.	Twin Falls	ID	83301	(208) 324-4633	2/15/2011	Processing	
V226A	Independent Meat Co.	3077 Eldridge	Twin Falls	ID	83301	(208) 733-0980			
M44972	Wyoming Authentic Products LLC	2517 LT. Childers Street	Cody	WY	82414	(307) 587-9841	8/2/2012	Processing	

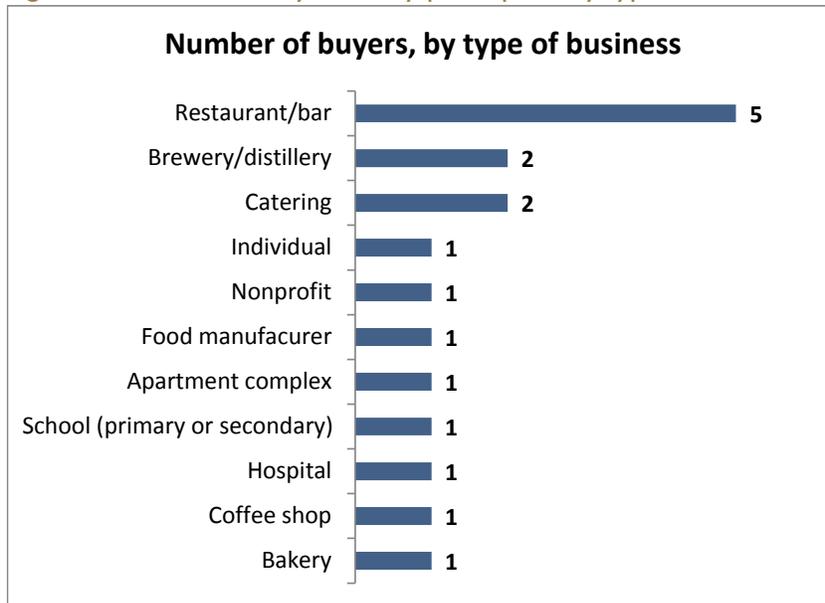
Source: US Department of Agriculture, Food Safety Inspection Service, Meat, Poultry and Egg Inspection Directory, current as of November 3, 2014, <http://www.fsis.usda.gov/wps/portal/fsis/topics/inspection/mpi-directory/>

Buyer interviews and surveys

Buyer survey: Respondent business characteristics

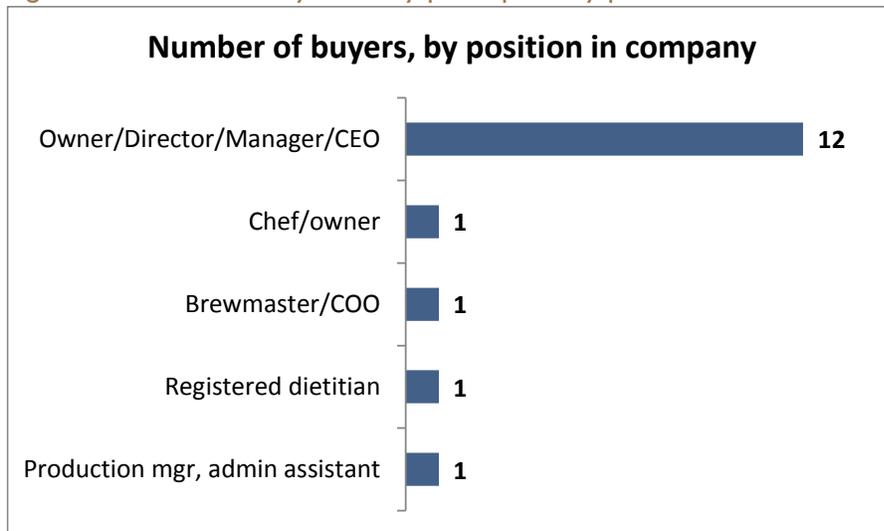
Most of the buyer survey respondents work for businesses that sell ready-to-eat food or drink to consumers (Figure 76). None of the buyers works for any type of grocery store. Almost all of the respondents had a management position in their company (Figure 77), and most work at businesses in Jackson, Driggs, or Victor (Figure 78).

Figure 76. Number of buyer survey participants by type of business or organization



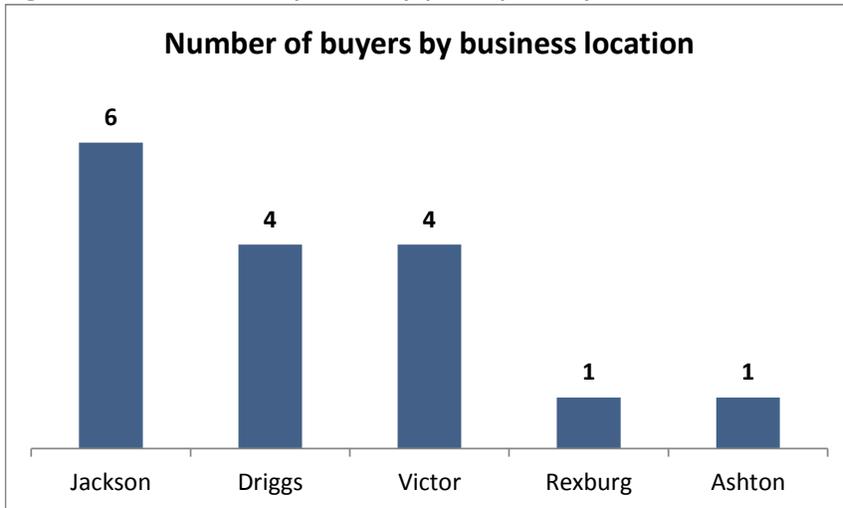
SOURCE: Buyer survey

Figure 77. Number of buyer survey participants by position in business



SOURCE: Buyer survey

Figure 78. Number of buyer survey participants by business location

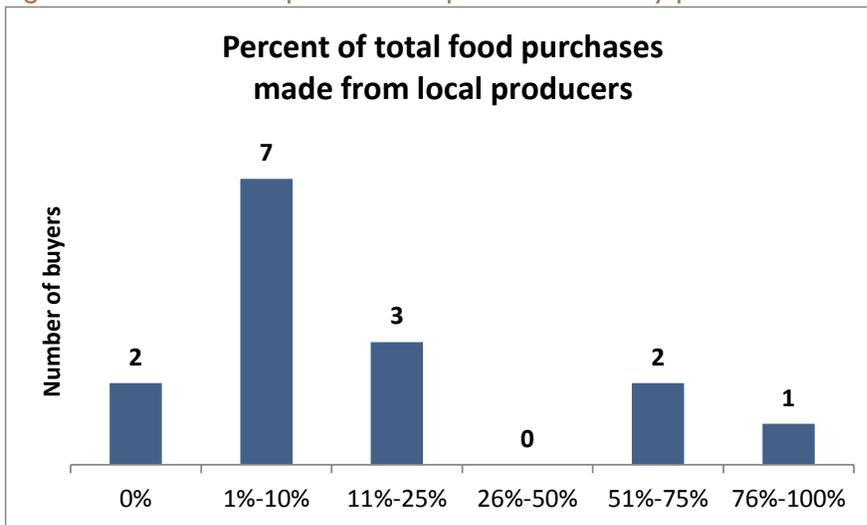


SOURCE: Buyer survey

What do buyers currently purchase and how?

Almost all surveyed buyers said they buy a portion of their total food purchases from local producers, with half of those surveyed buying directly from producers. When asked how much of their total food purchases are from local producers, about half of the respondents said they purchase 1-10% locally (Figure 79). Three said they buy more than half of their total food purchases from local producers.

Figure 79. Percent food purchases respondents said they purchase from local producers

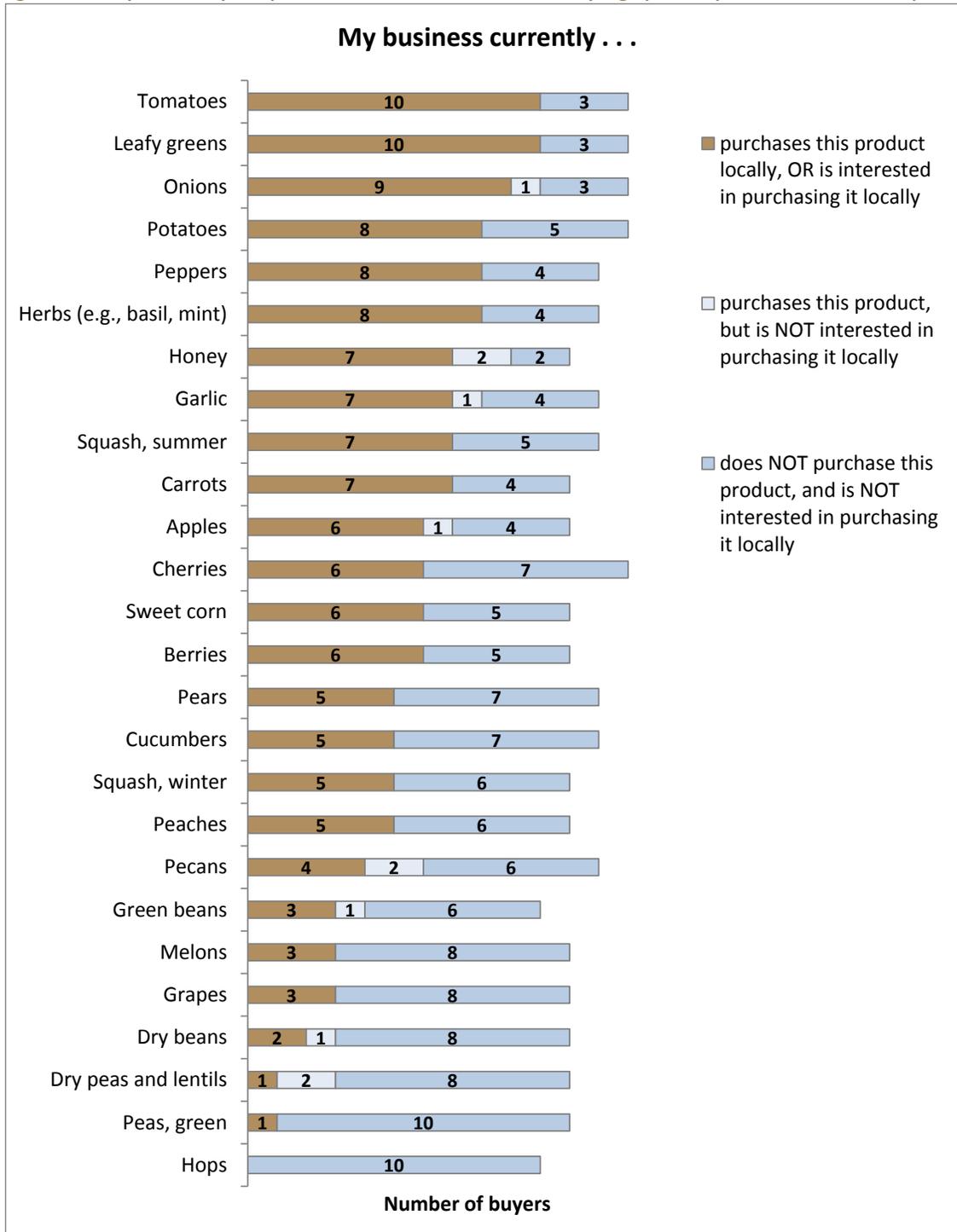


SOURCE: Buyer survey

Buyer survey respondents said they already buy, or are interested in buying, a wide range of local produce (Figure 80). Buyer survey respondents show the most interest in buying

tomatoes, leafy greens, onions, potatoes, peppers, and herbs from local producers. They show the least interest in buying hops and green peas from local producers.

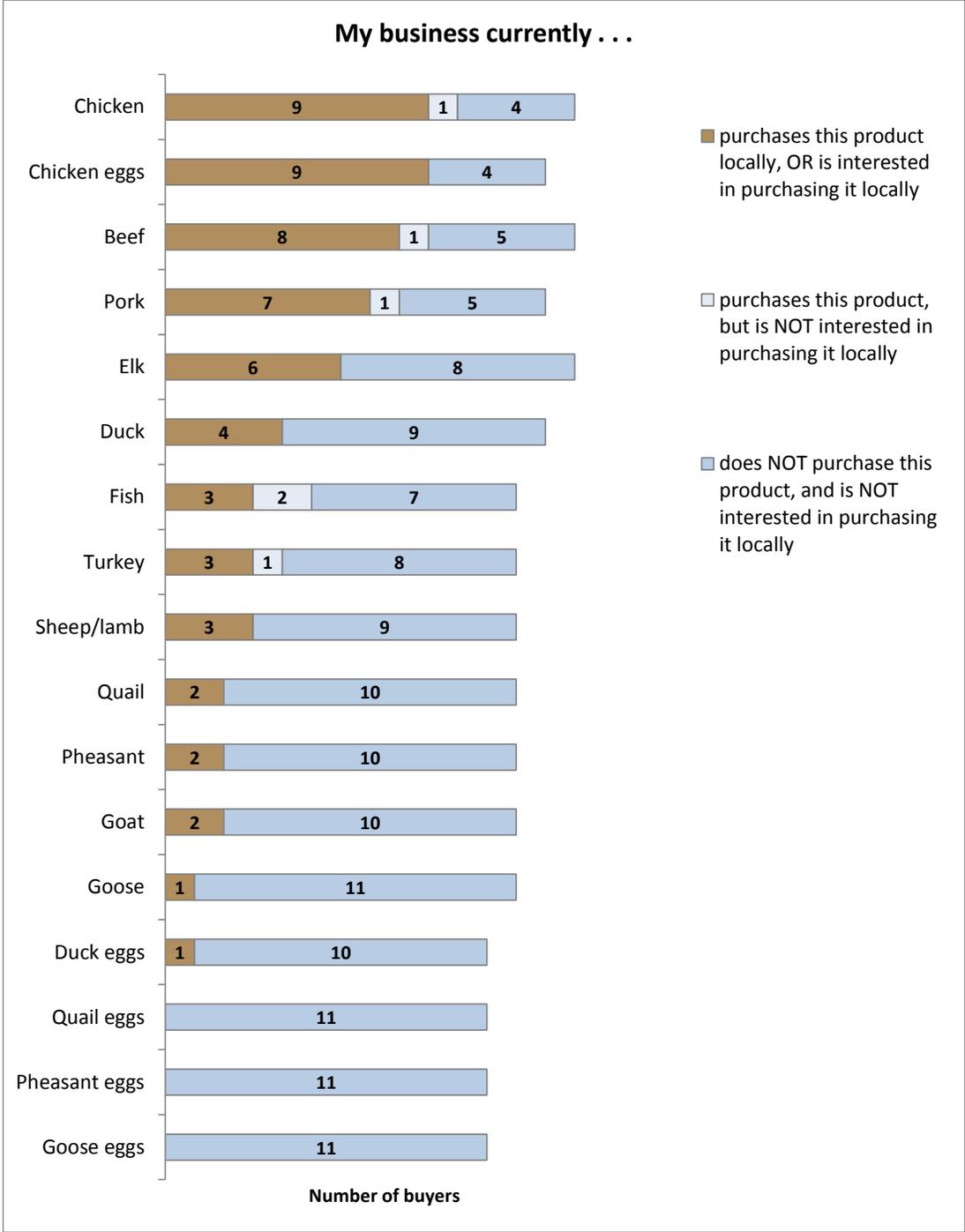
Figure 80. Buyer survey respondents' level of interest in buying specific produce and other products



SOURCE: Buyer survey

Respondents already buy, or are interested in buying, a wide range of local livestock products as well (Figure 81). Buyers show the most interest in purchasing chicken, chicken eggs, and beef from local producers. They show the least interest in buying quail eggs, pheasant eggs, and goose eggs from local producers.

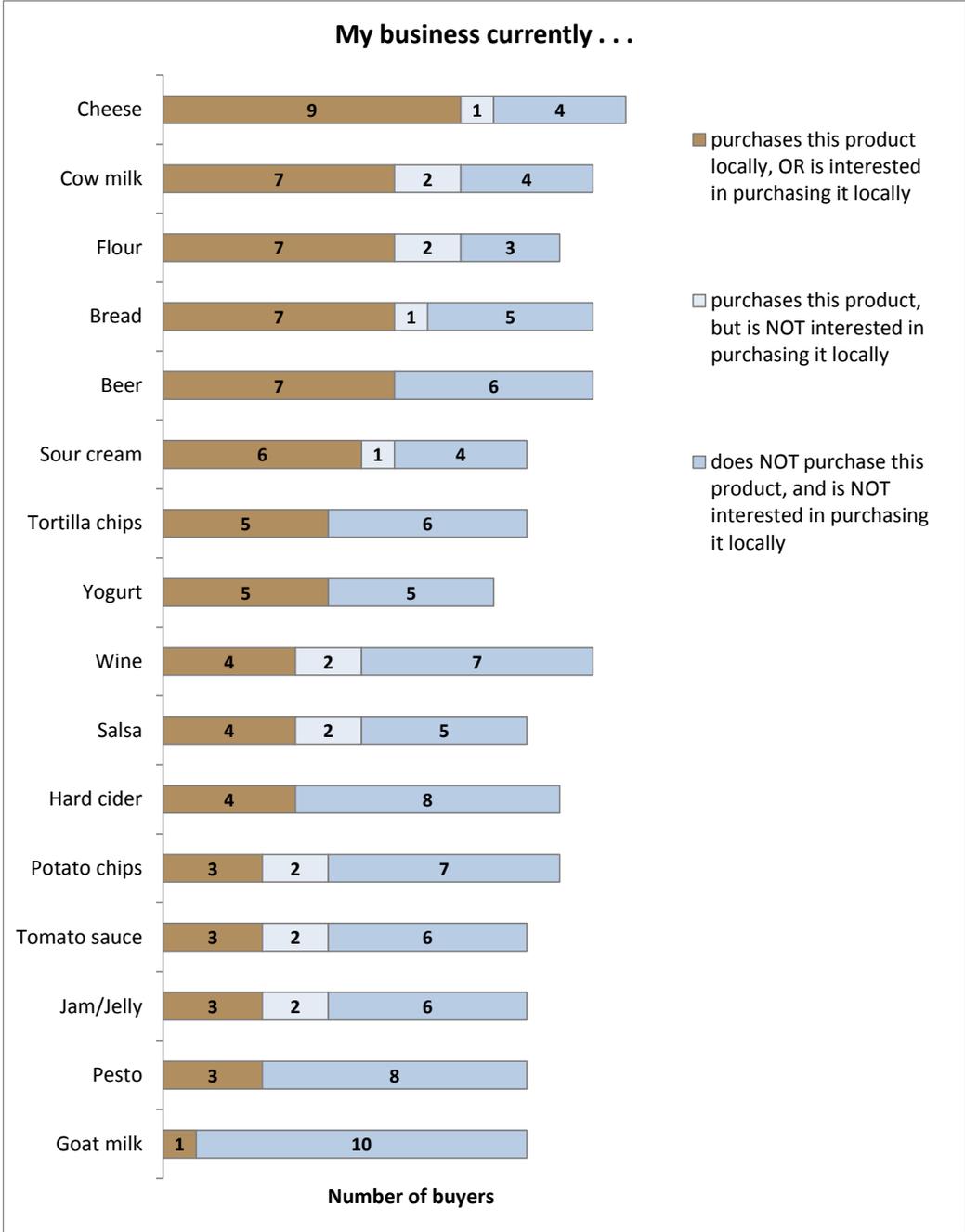
Figure 81. Buyer’s interest in buying specific livestock and poultry products



SOURCE: Buyer survey

Respondents already buy, or are interested in buying, a wide range of value-added or processed food products (Figure 82). Buyers show the most interest in buying cheese, cow milk, flour, bread, and beer from local producers. They show the least interest in buying goat milk and pesto from local producers. Figure 83 provides a list of the top produce, livestock, and value-added products buyers said they are interested in sourcing locally.

Figure 82. Buyer survey respondents' interest in buying specific value-added products



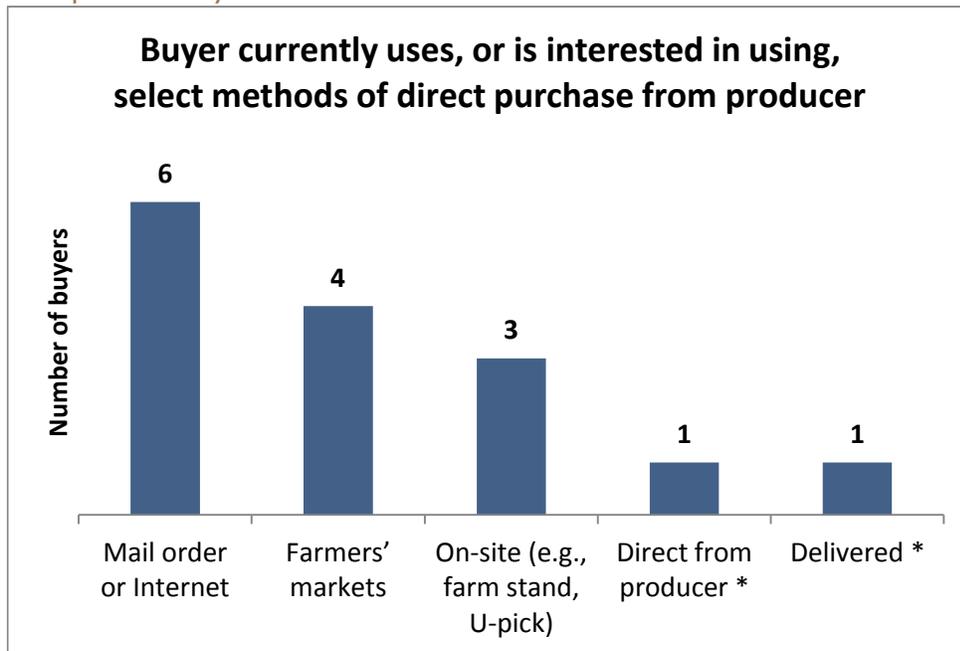
SOURCE: Buyer survey

Figure 83. Produce, livestock, and value-added products buyers said they are most interested in sourcing locally

Local buyers are most interested in purchasing these products from local producers		
Produce	Livestock products	Value-added products
Tomatoes	Chicken	Cheese
Leafy greens	Chicken eggs	Cows' milk
Onions	Beef	Bread
Potatoes	Pork	Flour
Peppers		Beer
Herbs		

SOURCE: Buyer survey

Figure 84. Number of buyer survey respondents saying they use or are interested in purchasing directly from producers by venue



SOURCE: Buyer survey

* Indicates a handwritten answer

Local buyers purchase food directly from producers in a variety of ways. The most common include mail order or Internet, farmers' markets, and on-site, according to buyer survey results (Figure 84). Currently, about half of the buyers surveyed (7 out of 15) purchase local food products through a distributor. Of those who do not, more than half (5 out of 8) are interested in doing so. Figure 85 provides a list of distributors buyer interview participants said they currently purchase products through.

Figure 85. Distributors local food producers work with

Distributors local food buyers said they currently work with

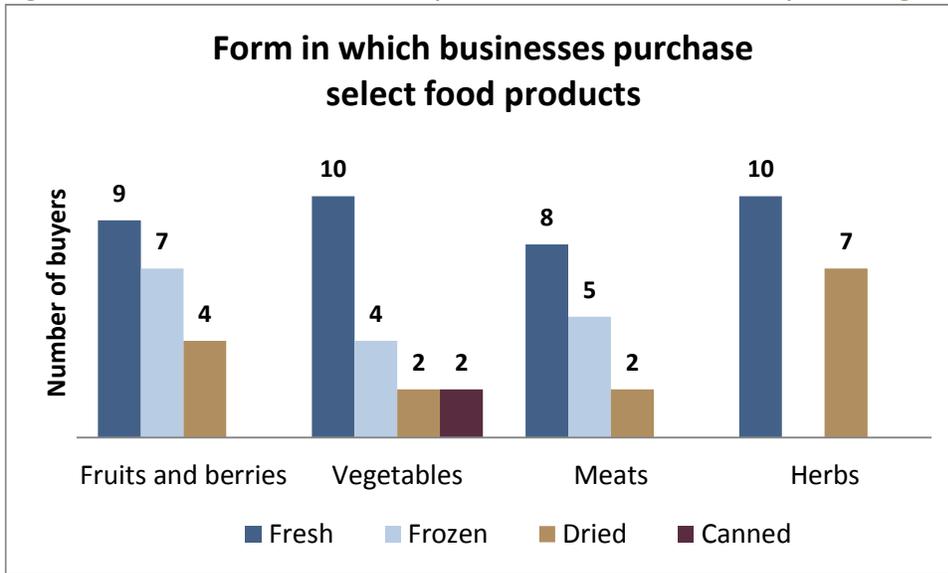
- ◆ Butcher Block Meats, Pocatello, Idaho
- ◆ Grasmick Produce, Boise and Idaho Falls, Idaho
- ◆ Nicholas and Company, Salt Lake City, Utah
- ◆ Spokane Produce, Inc., Spokane, Washington
- ◆ Sysco, National
- ◆ Food Services of America, National
- ◆ U.S. Foods, National
- ◆ United Natural Foods, Inc., National
- ◆ Nature’s Best Powered by KeHE, National
- ◆ Albert’s Organics, National
- ◆ Great Western Foods Company, International

Special product characteristics

Buyer survey respondents have a strong preference for purchasing fresh produce and meats, but they also buy frozen, canned, or dried products. Respondents were able to “select all that apply” when indicating the form in which they purchase or are interested in purchasing fruits and berries, vegetables, meats, and herbs. The results are presented in Figure 86. Related to level of preparation, a few buyer interview participants said they would be able to buy more local products if the products arrived washed and ready to use:

The other thing that is somewhat important is how the produce comes. For example, we’ve had a farmer offer to bring us lettuce and, even though it is a little bit more expensive, I would have paid for it if it came in washed and ready to eat because I don’t have ability to—especially with lettuce—to fully wash and properly dry it so that it stays fresh. (Restaurant, Teton County, WY)

Figure 86. Form in which businesses purchase or are interested in purchasing select items

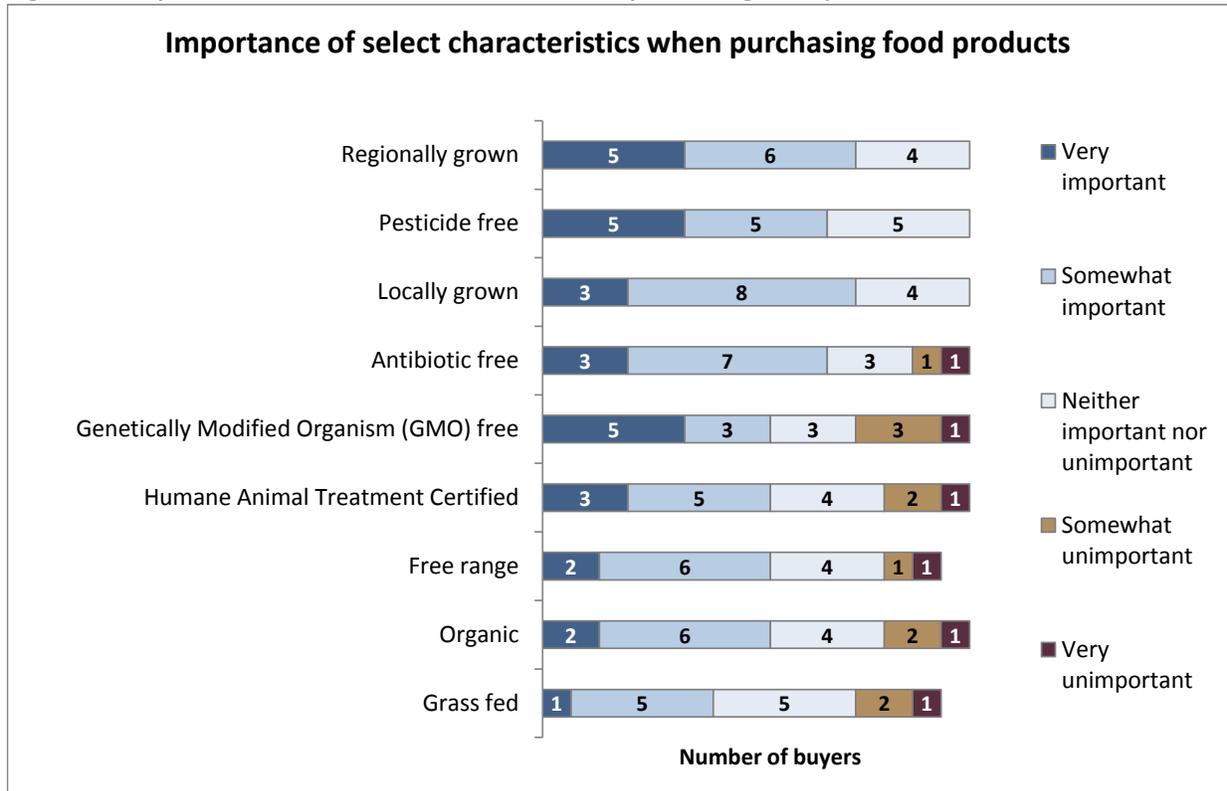


SOURCE: Buyer survey

When purchasing food products, buyer survey participants were most likely to say it is *very important* to buy products that are regionally grown, pesticide free, or Genetically Modified Organism (GMO)-free (Figure 87). They were also most likely to say it is *somewhat* or *very important* to buy regionally or locally grown products. That slightly more survey respondents said it is important to buy regionally grown products than locally grown products may reflect many buyers’ definition of local. For example, one buyer at a grocery store in Teton County, WY, said,

We have a broad view of ‘local.’ We think of it as more regional because there is quite a few food producers here, but it’s not a huge amount. So we look at the Intermountain Rocky region—Utah, Wyoming, Colorado, Montana, Idaho. We consider these local products because they’re coming from the closest area. They’re not being shipped across the country or across the world.

Figure 87. Importance of select characteristics when purchasing food products



SOURCE: Buyer survey

We also asked buyer interview participants about any particular product characteristics that they prefer, require, or would be interested in purchasing. Figure 88 lists the special product characteristics and Figure 89 lists the preferences and requirements buyers said they take into consideration when making purchasing decisions.

Buyer interview results on special product characteristics are similar to survey results, but provide explanation of why certain characteristics are important to buyers. One factor that came up in interviews that we did not think to include as a survey question is a preference some buyers have for product traceability:

One thing I do like with [the distributor] is the traceability. If we had a problem with a case of lettuce, they can take the number off that case and trace it back clear to the field that it came from. So local people don't necessarily have the technology and capability to say 'hey, where did this come from? Did anything happen to it in transport?' I mean, [the distributor] can track the food from basically the field to my door and they know where it was at all times. So they know if it was out of the food safety zone temperature wise and stuff like that. (Institution, Madison County)

Local product tracing technology could present a business opportunity. Some buyer interview participants expressed preference for genetically modified organism (GMO)-free products (“I

think a lot of us try to stay away from GMOs.”—Institution, Madison County), organic products (“We are an all organic restaurant so that is one of the foundations. I wouldn’t have a restaurant if it weren’t organic.”—Restaurant, Teton County, WY), or hormone-free products (“So we have no hormones in our milks at all, we’re antibiotic free with most of our beef we purchase now and our turkeys and hams are all natural for slicing for sandwiches and the milk that we purchase is hormone free.”—Institution, Teton County, WY). As some producers noted, consumer demand for products with special characteristics can create market niches and price premiums for producers.

Figure 88. Special product characteristics that interest local buyers from interviews

Special product characteristics that interest buyers

- ◆ Non Genetically Modified Organism (GMO)
- ◆ Organic and certified organic
- ◆ Traceability
- ◆ Antibiotic free
- ◆ Hormone free
- ◆ Local/regional
- ◆ Sustainable

Figure 89. Buyers’ product preferences and requirements from interviews

Buyers’ product preferences and requirements

- ◆ High product quality
- ◆ Food safety certifications (e.g., value-added products, meat products)
- ◆ Proof of certification(s) (e.g., certified organic)
- ◆ Liability insurance
- ◆ Minimum quantity
- ◆ Case-by-case/no preferences or requirements

Overall, most buyer interview participants said they make purchasing decisions on a case-by-case basis and do not necessarily have any special requirements limiting what they are able to buy. That said, many buyers also emphasized the importance of buying high-quality products. As one restaurant buyer in Fremont County said, “Our biggest thing is just quality.” As we mention below, this is not necessarily a constraint for local producers because perception of higher quality products is also one of the primary benefits buyers cited as motivating their interest in purchasing locally (“The [local] product is so much better.”—Institutional Buyer, Teton County, WY).

For some interview participants, proof of food safety certification—particularly for value-added food products—and/or liability insurance is important. Half of the buyer survey respondents (7 out of 14) work for businesses that require sellers to have some sort of food safety certification, but only 4 out of 14 require sellers to have liability insurance. Like many

producers, several food buyer interview participants said they are unsure of the legal liability insurance and food safety certification requirements, which may influence buyers' motivation to seek out locally produced foods. While many buyers said they do not know what the legal food safety and liability insurance requirements are (perhaps in part because someone else in their organization or business does), many thought these might be required, at least for some products:

There are some products that you wouldn't be able to [buy locally] without [food safety] certification and other [products] I don't know if it matters. I don't know the state laws, to be quite frank. (Restaurant buyer, Fremont County)

That many producers and buyers said they are unsure about liability insurance and food safety requirements points to the need for education on the topic to facilitate growth in the local food economy.



Additionally, some buyer interview participants said they prefer a minimum quantity of product from each supplier. However, when asked, the majority of interview participants said producers' inability to provide their preferred quantity would be not be a 'deal breaker.' Many buyers conveyed that their desire to source high-quality local products motivates flexibility when working with local producers:

Buyer: Volume is also an issue. As a grocery store, we're selling on a higher volume than say someone selling at a farmers' market. If we're only getting, say, one spring mix twice a week, there could be a couple days we don't have that available, but we want to keep things as predictable for our customer as possible. But it's often difficult for us to [provide predictability for customers when] we're working with smaller suppliers and producers.

Interviewer: Is producers' ability to provide a consistent, high volume ever a deal breaker?

Buyer: Yeah, it can be. Usually we're able to work with them in some way. We're able to be flexible in some way or we're able to work something out if the producer is committed to having their product in our store.

Interest in and opportunities for purchasing locally or regionally

Fourteen out of 15 buyer survey respondents said they are interested in increasing the *quantity* of locally produced food products they purchase. Twelve out of 15 survey respondents said they are interested in increasing the *variety* of locally produced food products they purchase.

Buyer interview results also suggest that many if not most local businesses and organizations already purchase or are interested in purchasing at least some portion of their food products from local producers. Only 2 of 11 buyer interview participants said they do not currently source some amount of food products locally. Most buyers said they are willing and interested in purchasing local products:

We're interested in having a wider variety [of local products]. We try to get in as many locally or regionally sourced products as we can that make sense for our business and that will be interesting to our customers at a good price point. So, I mean, if there's a product out there that we don't carry—I guess we're just looking for the most unique—the one that fits with our store. (Grocer, Teton County, WY)

Depending on how it looks and tastes—absolutely. I'd be more than willing [to buy from local producers]. (Restaurant, Fremont County)

I would source anything I could get locally. (Grocer, Teton County, ID)

Buyers' perceptions of benefits of buying local food products

The benefits buyers' perceived to sourcing local food products were very similar to the themes that emerged from interviews with producers (Figure 90).

Figure 90. Buyers' perceptions of the benefits of buying local food products

- | |
|--|
| <p>Benefits of buying local food products</p> <ul style="list-style-type: none">◆ Marketability◆ Relationship with producers◆ Supporting local farmers and communities◆ Higher product quality◆ Smaller environmental impact◆ Shorter transportation distance◆ Food security/independence |
|--|

Where producers emphasized the potential to receive higher returns on their products, buyers highlighted the enhanced marketability of local food products:

Well the biggest advantage is that especially in the changing market right now a lot of people are looking for local, they want to support their local guy....generally the cost is a little more, but people will pay a little more to support their local guy. (Grocer, Teton County, ID)

I like the idea of going local with stuff. I think people like the idea that it comes locally....it would be a big marketing thing. (Institution, Madison County)

Like producers, many buyers said the opportunity to develop a closer relationship and trust with the producer is a key benefit. In some cases, the relationship and trust may mitigate buyers' desire for technology-based traceability because they know where the product came from and how it was produced. Some buyers said they sell local non-certified organic products for a slight premium even though many small producers cannot afford to become certified organic:

If I know that there's a product that is...raised organically but it doesn't have the certification and if I know the farmer and I know [their practices] then.... [I trust] their product is organic as far as not raised with pesticides and what have you. (Restaurant, Teton County, WY)

For example, before we'll take on an egg producer we ask them...like, 'what are the conditions of the chickens? What is the feed that you're feeding them?' And...the end consumer is asking those same questions, too: 'are they fed organically?' In a lot of cases...animals are being fed organically and [raised under] organic practices, but they're not necessarily certified organic because they haven't gone to the lengths to be certified. So we'll state that. (Grocer, Teton County, ID)

Many buyers also said they like to support local farmers and their communities ("Supporting your local community is important to me."—Restaurant, Teton County, WY). Several also said

they believe local products often are higher quality (“It’s generally fresher and it’s generally picked a little bit closer to ripeness than you can get from the market growers.”—Grocer, Teton County, ID).

Additionally, buyer interview participants brought up benefits such as lower environmental impacts and food independence:

We need to have less footprint, we need to be able to sustain ourselves, you know, especially where we are here there’s not a lot that grows. (Institution, Teton County, WY)

If something happens we need to make some growers here to be able to feed ourselves. (Restaurant, Teton County, WY)

Challenges and barriers to buying locally

While buyers generally expressed great interest in purchasing local food products, they also indicated and discussed several challenges to doing so. When it comes to purchasing local food products, the most common challenges for buyers according to survey results include the price of products, the availability of specific products, the ability to access a large enough quantity, and the ability to access products when needed. Many of these challenges are related to seasonality and a short growing season. Buyer survey results show corporate business requirements, inadequate time, and food safety issues pose a moderate or significant challenge to the fewest buyers (Figure 91).

Figure 91. Buyer survey: challenges to purchasing local food products



SOURCE: Buyer survey

Many buyer interview participants said the price of local products can be a significant challenge (“Even though I want to use as much local produce as I can—the big challenge is pricing.”—Restaurant, Teton County, WY). Most buyers indicated they are willing to pay more for local products, as long as they are still affordable:

The challenge is just finding somebody that will work with us at a cost-effective pricing. If I can get quality local stuff, I would...realize that it does cost more and just go with it because that’s what we really need to do [for social, health, and environmental reasons]. (Institution, Teton County, WY)

[The local product prices] would have to be competitive in the market at least and we wouldn’t ask that anymore of [local producers] than any of our other purveyors. We do have contractual pricing with produce purveyors so we know what that price is going to be throughout the year. There are escalator clauses depending on what happens in the market and things like that. (Institution, Madison County)

For some buyers, demand and seasonality of demand were challenges that influence their ability to pay more for local products. For example, Todd Huchendorf, Food Services Director at Brigham Young University-Idaho, explained that his customer base does not create demand for local products:

Here at BYU-Idaho...we're very conservative....Our typical customer isn't driving us to buy local and be as 'green' as you would have at other campuses. It just isn't on their radar. They're more about being cheap. I read trade magazines and talk with other people operating other campuses—we don't face the influence of a student body who demands that we buy local, which I think is a great idea.

Some buyer interview participants, particularly restaurants, connected affordability and price challenges to seasonal demand created by the tourism industry (“We probably could [afford to buy more local products] if we didn't need the entire summer of business and sales to get us through the entire year.”—Restaurant, Teton County, WY).

As we report above, some buyers cited the study region climate and short growing season as challenges that limit product availability (“You know, we try to support local growers as much as we can [but]...our biggest problem is...there's just not a lot of local things [to buy].”—Grocer, Teton County, ID). Although climate is a limiting factor, our findings suggest a greater variety of products is available in the four-county region than many potential buyers and producers are aware.

Additionally, a few buyer interview participants brought up the ordering process and additional time it can take to work with local producers. This theme contrasts with the 9 out of 14 buyer survey respondents who indicated that inadequate time is not a challenge to buying local products:

One hiccup could be the ordering process and making sure...it wasn't a big headache to order the food from them. Because right now we jump on a website, order what we need and it shows up in three days. You know, twice a week we get a truck. And I'm sure it would be different with a local farmer, but it would just be fine as long as the process wasn't too complicated. (Institution, Madison County)

It's a lot of work on our end to manage all those small vendors. I guess because we...don't just make one order like we do with these big distributors. We have to call each of these small, individual vendors who are bringing stuff in. (Grocer, Teton County, ID)

Figure 92 lists a full list of perceived challenges from buyer interviews.

Figure 92. Buyers' challenges of purchasing local food products from interviews

Challenges for buyers

- ◆ Competitive price point
- ◆ Seasonality of demand—tourist season
- ◆ Complicated ordering process
- ◆ Product consistency (e.g., size and color)
- ◆ Growing season and climate
- ◆ Knowing what is available
- ◆ Adequate volume
- ◆ Transportation distance
- ◆ Predictability (e.g., product availability and pricing)
- ◆ Level of preparation (e.g., buyers' ability to wash produce)
- ◆ Consumer demand and cultural factors

Buyer survey respondents who indicated interested producers can contact them

Several survey respondents represent businesses interested in purchasing products from local producers. Local producers are welcome to contact the following businesses:

- ◆ The Blue Lion
- ◆ Grand Teton Brewing Company
- ◆ Picas Mexican Taqueria
- ◆ The Brakeman American Grill
- ◆ Chocolate Moose Royale
- ◆ Fired Earth Pizza
- ◆ St. John's Medical Center
- ◆ Cowboy Bar



CONCLUSIONS

Key findings and recommendations

This project explored the potential for developing local and regional food production, processing, and markets in Teton, Fremont, and Madison counties in Idaho and Teton County in Wyoming. The project team found strong potential for and interest in locally produced agricultural products. To build on the existing activity documented in this assessment, a number of actions can be taken to strengthen and grow the local foods economy in this four-county area. The following sections present our key findings and recommendations.

Supply chains and local markets

Local supply chains already exist in the four-county region and a high percentage of producers surveyed participate in them. The area is not starting from scratch, but building on existing economic activity. Furthermore, demand exists to grow the local supply chains and add new ones.

Key findings

- ◆ USDA Agricultural Census data show that the number of farms in the study region increased by 4% from 2007-2012. Most of that growth was among farms smaller than ten acres. The increasing number of small farms along with data showing increases in the number of producers direct marketing and selling locally suggest growing interest and participation in local markets.
- ◆ While the short growing season and cold climate are significant barriers for most producers, some report selling animal and produce items throughout the year or during an extended season. Additional opportunities exist for those who are able to extend the growing season through hoop houses or other technologies or store products for year-round distribution. Livestock producers can change their birthing cycle: for example, one livestock producer reported having two cattle herds that each birth at a different time of year—one in fall and the other in spring. Producers are

succeeding with a variety of strategies to bring their production in alignment with the needs of buyers and consumers.

Recommendations

- ◆ Institutional buyers (e.g., hospitals, correctional facilities) could provide a sizeable, dependable, long-term market with demand during summer months when institutions like schools and universities are closed. It may also be worth exploring opportunities with large-scale buyers such as lodge companies and National Park vendors who may be motivated to support local agriculture for environmental, marketing, and other reasons. One key informant suggested the Western Sustainability Exchange (<http://www.westernsustainabilityexchange.org/>) as an organization that may be able to provide insight on what it takes to connect with consumers north of Yellowstone National Park.
- ◆ Maximize market potential from surrounding population centers such as Idaho Falls and Pocatello, which may provide additional viable markets (e.g., restaurants, institutions, and grocers). Most buyers who participated in the assessment have a regional sense of what they consider ‘local,’ and these areas fall within the 100 mile radius definition of local adopted for this project.



Marketing, networking, and education

Activities that link producers to buyers and consumers will help producers expand existing and new supply chains.

Key findings

- ◆ USDA Agricultural Census data underreport the number of producers raising some varieties of products, and many producer, buyer, and key informant participants were unaware of the diversity of products grown in the region. A need exists for increasing consumers’ and other stakeholders’ awareness of available local products to help build demand for a greater amount and diversity of locally grown products.
- ◆ Several producers expressed a desire to increase awareness among consumers about what grows well locally, why it is important to support a local food system, and how to prepare local foods so they are palatable to consumers.

- ◆ The majority of buyers who participated in the assessment said they are interested in increasing the quantity or diversity of local products they purchase; however, many do not know what is available or how to access local products.
- ◆ The relationship between local producers and buyers was an important potential benefit and challenge that emerged in conversations with producers, and it was also one of the most important potential benefits of buying local goods cited by food buyer interview participants. Buyers said they are motivated to buy local food products by the opportunity to know more about the products, forge relationships with producers, and establish trust. So while taking time to develop relationships with local buyers may be challenging for producers, it also may lead to greater, more dependable local market opportunities.

Recommendations

- ◆ The region could develop an online venue to inventory local goods and help connect buyers with locally produced products. Several participants expressed interest in Idaho's Bounty as a model and potential partner for an online food co-op that aggregates and distributes member products in eastern Idaho. Idaho Preferred, a program administered by the Idaho State Department of Agriculture, helps producers market and consumers locate and access local agricultural products (<http://idahopreferred.com/>). For more information, refer to the 'Resources' section. Such a resource could help buyers learn what and when products are available and facilitate coordination between producers and buyers (for example, to help producers plan).
- ◆ Consider hosting annual or semiannual meetings or conferences to facilitate networking and to provide educational opportunities (e.g., speakers) on key topics. Producers in Driggs said they would be willing to travel up to 75-100 miles for meetings or conferences, but many would be unable to stay overnight due to caring for animals. Most preferred to minimize winter driving. Also, for those willing to travel, advertise conference opportunities hosted in other areas of the state (e.g., Boise area) to expand farmer-to-farmer learning and networking opportunities. Develop farmer-to-farmer education opportunities so local producers can learn from each other. Other recommendations to promote networking among producers and between producers and potential buyers, include developing a website and working with other organizations engaged in similar missions, such as Slow Food in the Tetons (for more information, refer to the 'Resources' section).
- ◆ Outreach would help consumers understand why locally-grown food products are often sold at a premium price. Develop ways to educate chefs and other consumers on how to incorporate seasonal produce into menus and prepare forage-fed beef to optimize flavor and texture and other products (e.g., produce) that grow well in local conditions. It may be especially important to educate buyers about products they are not used to preparing, such as lamb and less familiar vegetables.

- ◆ Many buyers and producers said they have little knowledge about state and federal food safety regulations and liability insurance requirements. Increasing producer and buyer knowledge of food safety, other relevant state and federal regulations, and the regulation process to sell to different types of buyers could facilitate growth in the local market.
- ◆ When looking for examples or models to emulate, focus on strategies and programs from similar places (e.g., in terms of population density or distance to markets). Places like rural areas of Montana, Oregon, and Wyoming may provide the most relevant case studies. We provide a list of program and funding resources in the following ‘Resource’ section.
- ◆ Producers identified inadequate time as the top challenge to selling locally. Although a few buyer interview participants said the time it takes to coordinate with many small buyers can be challenging, buyer survey respondents indicated inadequate time was among the least significant challenges to purchasing local products. Cooperative aggregation, distribution, and marketing strategies could maximize time efficiency and support producers’ ability to participate more fully in the local system.
- ◆ The assessment found several local producers who are interested or already serving a role as produce brokers. For example, Wilcox serves as a local broker of many products. Consider identifying brokers who can spend time handling sales, some marketing, and many of the logistics.
- ◆ For livestock producers, encourage selling quarters, halves, and whole animals through local meat processors who already have a retail component to their business. Distributing a simple listing of available processing options with contact information would help connect producers with USDA-inspected or value-added processing so they can access additional buyers (e.g., Figure 75).

Farmers’ markets

Farmers’ markets are an obvious avenue for selling local products. Many producers are already selling through farmers’ markets in the area.

Recommendations

- ◆ Develop a steering committee for farmers’ markets in Teton County, ID, to spread the burden of planning, coordinating, and orchestrating a farmers’ market and to make decisions that reflect the needs and preferences of local producers so more producers can participate and be successful. Driggs focus group participants were interested in finding funds to hire a paid farmers’ market coordinator (see the ‘Funding Resources’ section).
- ◆ Driggs focus group participants suggested moving the Driggs farmers’ market to Tuesday evening. It is currently held on Friday mornings, which participants said is not a good time for consumers. Also consider adding live music or other forms of entertainment to make the market more vibrant.

- ◆ Develop cooperative marketing where possible. For example, to increase demand for select products, ask farmers' market coordinators to help "feature" them by giving away samples of a prepared product at the farmers' market with recipe handouts.
- ◆ Similarly, a farmers' market booth could be dedicated to marketing, providing information about, and taking orders for local meat and grain products. Rather than requiring each producer to pay for and attend their own stand, multiple producers could benefit from a collaborative effort that advertises their products while reducing demand on their time.
- ◆ Organize a study tour of successful farmers' markets in the region, in both small and large settings, to give producers an opportunity to learn from what others are doing successfully.
- ◆ Survey farmers' market customers to help producers and other stakeholders understand more about demand and willingness to try new, in-season products, while raising awareness.



Agritourism, nature tourism, and heritage tourism

The tourism industry is a major driver of the regional economy. For example, accommodation and food service industries account for 15% of all jobs in the four-county region. One promising strategy for promoting local agriculture and food systems is to leverage the tourism infrastructure that already exists and expand tourism opportunities by building agricultural tourism or agritourism enterprises (e.g., fee hunting, horseback riding, farm stays, barn dances, U-pick). Some producers in the region already earn supplementary income by incorporating agritourism, nature tourism, or heritage tourism into their operations. Refer to the 'Resources' section for specific agritourism resources.

Infrastructure

Key findings

- ◆ During focus groups and interviews, it became apparent that many producers were unaware of, or had incomplete knowledge of, existing local infrastructure. For example, several producers were unaware of local USDA-inspected meat processors.

Recommendations

- ◆ There is a need to raise awareness of what already exists locally for USDA-inspected meat processing and commercial kitchens, and look into expanding this infrastructure where feasible to better meet the needs of local producers. Also, make sure local livestock producers are aware that Jones Meat and Food Service, Inc. in Rigby, ID, is looking to grow its business and process more animals. Where additional processing is needed, explore opportunities with existing local processors to expand their services rather than trying to start up a new operation from scratch.
- ◆ Because of the low population density in the area, livestock producers would likely need to link local activities to a secondary regional market to make significant processing infrastructure investments cost-effective.
- ◆ Existing produce supply chains process small quantities to small markets. It is not clear that large infrastructure projects are needed. At the volumes that look possible, a commercial kitchen in an area would meet many producer and value-added needs.

Food equity, access, and security

As stated in a local opinion article, “. . . in Jackson, only the wealthy can afford to eat healthy.”²³ While many local consumers can afford to pay for local food products, many others have low incomes and/or rely on food stamps. Farmers have to make a living and pay employees a fair wage, making it difficult for them to reduce their prices. To make fresh, healthy, local produce available to the area’s low-income families, consider working with local farmers' markets to accept food stamps. The following resources can help (see the subsequent section for a list of additional resources):

- ◆ The Rexburg farmers' market already accepts food stamps,²⁴ so use them as a guide.
- ◆ Consult the USDA’s Food and Nutrition website to access info on how to set this up: <http://www.fns.usda.gov/eat/learn-about-snap-benefits-farmers-markets>
- ◆ For more information on, and equipment for, accepting food stamps at markets in Idaho, consult this Idaho Hunger Relief Task Force report: <http://www.idahohunger.org/What%20assistance%20is%20there%20for%20Idaho%20markets--1%20pg%20summary%20%282%29.pdf>
- ◆ Contact Kathy Gardner from the Idaho Hunger Relief Task Force (<http://idahofoodbank.org/>) to learn about having a VISTA volunteer train farmers’ market organizers on accepting food stamps at local farmers’ markets.
- ◆ To make a bigger impact, consider the ‘double bucks’ program, <http://doubleupfoodbucks.org/>, which gives food stamp clients twice as much credit for benefits spent at participating farmers’ markets.

²³ http://trib.com/opinion/letters/senseless-squandering-of-funds/article_e6f51780-2cb1-5d4b-aa0b-3d92c86afc18.html

²⁴ <http://search.ams.usda.gov/farmersmarkets/#>



Agritourism 101 (Virginia Cooperative Extension)

<http://pubs.ext.vt.edu/310/310-003/310-003.html>

Agriculture Marketing Resource Center: A National Information Resource for Value-Added Agriculture

http://www.agmrc.org/commodities_products/agritourism/

Beginning/Transitioning Farmer (Organic Farming Research Foundation)

<http://ofrf.org/education/beginning-transitioning-farmer>

Resources for farmers starting or transitioning to organic farming practices.

Building Sustainable Farms, Ranches, and Communities: A Guide to Federal Programs for Sustainable Agriculture, Forestry, Entrepreneurship, Conservation, Food Systems, and Community Development

<https://attra.ncat.org/attra-pub/summaries/summary.php?pub=279>

This guide is written for anyone seeking help from federal programs to foster innovative enterprises in agriculture and forestry in the United States. Specifically, the guide addresses program resources in community development; sustainable land management; and value-added and diversified agriculture and forestry.

Community Guide to Nature Tourism (Washington State Fish and Wildlife)

<http://wdfw.wa.gov/viewing/tourism/community/>

Cultivating Success™: Sustainable Small Farms Education (University of Idaho Extension)

<http://www.cultivatingsuccess.org/>

Creating and implementing educational programs to increase the number and foster the success of sustainable small acreage farmers and ranchers in Idaho and Washington.

Cultural Heritage Tourism

<http://www.culturalheritagetourism.org/index.html>

Getting started, success stories, funding opportunities, cultural heritage information and 'toolkits' from Utah, Vermont, Colorado, and Native American Tribal Tourism Toolkit.

eXtension

http://www.extension.org/community_and_regional_food_systems

eXtension is a free interactive learning environment delivering the best, most researched knowledge from land-grant universities across America.

Farm Activities Associated With Rural Development Initiatives

<http://www.ers.usda.gov/publications/err-economic-research-report/err134.aspx>

This report improves understanding of the farm and farmer characteristics that may influence farm operator involvement in development-related activities, specifically by focusing on five farm activities: organic farming, value-added agriculture, direct marketing, agritourism, and energy/electricity production.

Farm to School Program (USDA)

<http://www.fns.usda.gov/farmtoschool/farm-school>

The USDA Farm to School Grant Program assists eligible entities in implementing farm to school programs that improve access to local foods in eligible schools. On an annual basis, USDA awards up to \$5 million in competitive grants for training, supporting operations, planning, purchasing equipment, developing school gardens, developing partnerships, and implementing farm to school programs.

Farmers Guide to Applying for Value Added Producer Grants, 2013-2014

<http://sustainableagriculture.net/wp-content/uploads/2008/08/Revised-2013-2014-VAPG-Application-Guide-NSAC-March-2014-Final.pdf>

The Value-Added Producer Grant program provides grants, awarded on a competitive basis, to individual independent agricultural producers, groups of independent producers, producer-controlled entities, organizations representing agricultural producers, and farmer or rancher cooperatives to create or develop value-added producer-owned businesses.

Federal Programs that Can Support Heritage Tourism (Advisory Council on Historic Preservation)

<http://www.achp.gov/heritagetourism-assist.html>

A sampling of federal programs that can help promote and support local or regional heritage tourism initiatives. Historic preservation grants-in-aid—such as Historic Preservation Fund projects, grants to Certified Local Governments and Indian tribes, American Battlefield Protection grants, and Save America’s Treasures grants—could each theoretically be used for some relevant aspect of a heritage tourism project or program.

Food Hubs: Building Stronger Infrastructure for Small and Mid-Size Producers

<http://www.ams.usda.gov/AMSV1.0/foodhubs>

“By serving as a link between the farm or ranch and regional buyers, food hubs keep more of the retail food dollar circulating in the local economy. In effect, the success of regional food hubs comes from entrepreneurship, sound business sense and a desire for social impact.”— USDA Secretary Tom Vilsack,

Full Circle Education

<http://www.tetonfullcircle.org/>

“Full Circle Education teaches and promotes sustainable patterns of living through hands-on experiences associated with local organic farms, gardens, and wild places.”

Grassroots Guide to Federal Farm and Food Programs

<http://sustainableagriculture.net/publications/grassrootsguide/>

Federal programs and policies most important to sustainable agriculture and how they can be used by farmers, ranchers, and grassroots organizations nationwide.

Guide to Idaho's Farmers Markets, 2014

<http://www.agri.idaho.gov/Categories/Marketing/Documents/2014FarmersMarketGuide.pdf>

Handmade in America

<http://www.handmadeinamerica.org/>

A unique non-profit community and economic development corporation, plays a vital role in growing a sustainable, thriving economy in Western North Carolina. ***"We believe that craft inspires individuals and strengthens communities, and most importantly we know that craft, heritage, and culture are economic engines that build sustainable and vibrant places to live, work, and play."***

Hospitals and Healthy Food: How Health Care Institutions Can Improve Community Food Environments (2014)

<http://www.ucsusa.org/our-work/food-agriculture/solutions/expand-healthy-food-access/hospitals-and-healthy-food.html#.VHAwjcnlBIU>

By partnering with local organizations to devise and invest in healthy food systems, health care institutions can improve health and equity in their communities while reducing costs.

Idaho AgBiz (University of Idaho Dept. of Agricultural and Rural Economics)

<http://web.cals.uidaho.edu/idahoagbiz/>

Idaho Crop Enterprise Budgets, Idaho Livestock Enterprise Budgets, Idaho Crop Lease Calculator, farm financial planning and analysis software, Idaho Crop Machinery Cost Calculator, Training Programs

Idaho Agricultural Statistics. National Agricultural Statistics Service

http://www.nass.usda.gov/Statistics_by_State/Idaho/index.asp

Includes current crop estimates, current livestock estimates, annual crop summary, Idaho USDA Agricultural Census factsheet, and other resources.

Idaho Community Supported Agriculture Guide, 2015

http://www.agri.idaho.gov/Categories/Marketing/Documents/CSABrochure_web.pdf

Idaho Farmers Market Manual, 2104

<http://www.agri.idaho.gov/Categories/Marketing/Documents/Establishing%20a%20Farmers%20Market%202014.pdf>

A comprehensive guide to market establishment, management, and promotion in Idaho.

Idaho's Bounty

<https://www.idahosbounty.coop/>

Develops and promotes a local, sustainable food system for the communities of Southern Idaho that ensures safe, consistent, fresh, ethically produced and delivered products direct from producers.

Contact: TJ Stevens, General Manager, (208) 631-3720, GM@idahosbounty.coop

Idaho Preferred

<http://idahopreferred.com/>

A program to identify and promote food and agricultural products grown, raised, or processed in the Gem State. Administered by the Idaho State Department of Agriculture, the program showcases the quality, diversity, and availability of Idaho food and agricultural products and is working to assist Idaho consumers in their efforts to find local products.

Contact: Leah Clark, Program Manager, (208) 332-8684, leah.clark@agri.idaho.gov

Know your Farmer, Know your Food

http://www.usda.gov/wps/portal/usda/usdahome?navid=KYF_COMPASS

Learn about how USDA and our federal partners support local and regional food economies, see communities putting these resources to work, and explore the map to find out what's happening near you.

Local Food Systems: Concepts, Impacts, and Issues (USDA)

http://www.ers.usda.gov/media/122868/err97_1.pdf

This comprehensive overview of local food systems explores alternative definitions of local food, estimates market size and reach, describes the characteristics of local consumers and producers, and examines early indications of the economic and health impacts of local food systems.

Local Food Movement: Setting the Stage for Good Food

<http://foodsystems.msu.edu/resources/local-food-movement-setting-the-stage>

This publication provides a brief history of the U.S. local food movement and its link to “good food” - food that is healthy, affordable, fair, and green - within the contexts of food access and health, food justice and sovereignty, the environment, and racial equity.

Market Forces: Creating Jobs through Public Investment in Local and Regional Food Systems (2011)

http://www.ucsusa.org/food_and_agriculture/solutions/expand-healthy-food-access/market-forces.html#.VHA38nIbIU

This report reviews recent research on local and regional food systems and their economic effects.

National Agricultural Law Center—Local Food Systems Research

<http://nationalaglawcenter.org/research-by-topic/local-food-systems/>

Resources on topics related to local food systems.

National Agricultural Library (USDA)

<http://www.nal.usda.gov/>

Access to one of the world's largest collections devoted to agriculture and its related sciences.

Example: List of Alternative Crops and Enterprises for Small Farm Diversification

<http://afsic.nal.usda.gov/list-alternative-crops-enterprises-small-farm-diversification>

National Good Food Network

<http://www.ngfn.org/>

The National Good Food Network is bringing together people from all parts of the rapidly emerging good food system – producers, buyers, distributors, advocates, investors, and funders – to create a community dedicated to scaling up good food sourcing and access.

National Good Food Network Database

<http://www.ngfn.org/resources/ngfn-database>

Whether you're a producer preparing to "scale up" to larger markets or a national distributor searching for sample business models to meet the growing demand for locally and regionally sourced food, the National Good Food Network is your first stop for resources and tools. In addition to the resources featured in the links to the left, you can also search the NGFN Database for a wide variety of research, business plans, and innovative models.

National Sustainable Agriculture Coalition

<http://sustainableagriculture.net/>

NSAC advocates for federal policy reform for the sustainability of food systems, natural resources, and rural communities. This website provides research reports, policy briefs, and current news impacting rural communities.

National Sustainable Agriculture Coalition—Local Food Systems Publications

<http://sustainableagriculture.net/publications/grassrootsguide/local-food-systems-rural-development/>

Overview of the key federal programs focused on expanding local and regional food systems, from healthy food access and food security programs like Community Food Projects to the farmer-focused Value-Added Producer Grants. It includes programs directly available to producers as well as programs available to community-based organizations and institutions working on the ground to build and expand on the success of local and regional food efforts.

National Visitor Use Monitoring Program (NVUM)

<http://www.fs.fed.us/recreation/programs/nvum/>

The NVUM program produces estimates of the volume of recreation visitation to National Forests and Grasslands. NVUM also produces descriptive information about that visitation, including activity participation, demographics, visit duration, measures of satisfaction, and trip spending connected to the visit.

Preserve America Clearinghouse.

<http://www.preserveamerica.gov/clearinghouse.html>

A list of programs and materials relevant to historic and cultural preservation, heritage tourism, and heritage education.

Slow Food in the Tetons

<http://tetonslowfood.org/>

Slow Food in the Tetons' mission is to "promote and celebrate good, clean, and fair food in our community through educational programming, events, and initiatives."

Small Farm Program (UC-Davis Extension)

<http://sfp.ucdavis.edu/>

Conducting applied research and outreach programs for the successful adoption, management, and marketing of potentially profitable crops and enterprises. Includes information about marketing, agritourism, specialty crops, rural cooperatives, food safety, and more.

So You Want to Start an Agritourism Farm (North Carolina Dept. of Agriculture and Consumer Services)

<http://www.ncagr.gov/markets/agritourism/documents/StartingAgritourismBusiness.pdf>

Start2Farm

<http://www.start2farm.gov/>

A database of programs and resources for beginning farmers and ranchers in the United States. The Start2Farm site and program are a project of the National Agricultural Library in partnership with the American Farm Bureau Federation. Start2Farm is funded through a USDA, National Institute of Food and Agriculture (NIFA), Beginning Farming and Ranching Development Program grant and was developed to assist people new to farming or ranching and those who have less than 10 years' experience.

Supplemental Nutrition Assistance Program (SNAP) at Farmers Markets: A How-To Handbook (USDA)

<http://www.ams.usda.gov/AMSV1.0/getfile?dDocName=STELPRDC5085298>

A step-by-step guide on setting up, marketing, and adding incentives for Farmers Markets to accept SNAP (aka food stamps) for food purchases.

Travel and Tourism (USDA Forest Service).

<http://www.fs.fed.us/recreation/programs/tourism/>

Two Degrees Northwest: Where Art Meets the Land (University of Idaho Extension)

<http://2dnw.org/>

Working to support and create opportunities for art and food-based economic development; to cooperatively market the region's artists and artisans; and to promote our region's arts and fine crafts along with other locally made products such as foods, wines, unique sites, services, and experiences.

Virginia Cooperative Extension Resources on Agritourism

<http://pubs.ext.vt.edu/310/310-003/310-003.html>

Provides an overview and evaluation of existing assets, business plans, small farm examples, risk management, and many other resources.



FUNDING OPPORTUNITIES

Includes opportunities for small farms, rural community development, farmers markets, food systems, cultural/heritage tourism, trails, agritourism, and others.

Key source of federal grant information:

Grants.gov

www.grants.gov

Provide a common website to search and apply for funding opportunities offered by federal agencies. Searchable by keyword, funder, categories, etc.

Agritourism and Alternative Enterprises (USDA Natural Resources Conservation Service)

<http://www.economics.nrcs.usda.gov/altenterprise/index.html>

This technical assistance program assists farmers and ranchers in exploring alternate economic enterprises, including heritage tourism.

America's Historic Places Grants (National Endowment for the Humanities)

www.neh.gov/grants/guidelines/historicplaces.html

Part of NEH's 'We the People Initiative,' this program provides funding for public programs that use one or more historic sites to address issues central to American history. Projects eligible for funding may interpret a single historic site, a series of sites, whole neighborhoods, communities or towns, or larger geographical regions. Fundable activities include docent tours, publications (e.g., brochures, guidebooks, etc.), driving or walking trails or tours, annotated itineraries, exhibition labeling or trail signs, films, and digital media.

American Heritage Rivers Initiative

<http://water.epa.gov/type/watersheds/named/heritage/>

This umbrella initiative is designed to help communities along 12 designated American Heritage Rivers receive improved access to technical and financial assistance from federal agencies. The overall goals of the program are to foster economic revitalization, natural resource and environmental protection, and historic and cultural preservation. Each river has a federal single point-of-contact to assist communities, and federal agencies make field staff available to each American Heritage River to help match community needs with available resources.

Beginning Farmer and Rancher Development Program (USDA National Institute of Food and Agriculture (NIFA))

<http://www.nifa.usda.gov/fo/beginningfarmerandrancher.cfm>

Strengthens beginning farmers' technical and business skills by funding training projects for beginning farmers led by non-profit organizations, academic institutions, extension services, and producer groups.

Challenge America Fast-Track Review Grants (National Endowment for the Arts)

<http://www.arts.gov/grants/apply/GAP10/Challenge.html>

These grants offer support to small and mid-sized organizations for projects that extend the reach of the arts to underserved populations. Eligible projects include those focusing on the development of cultural tourism and cultural districts, and assisting local economic development and cultural publicity efforts

Community Economic Development Healthy Food Financing Initiative (Department of Health and Human Services. Office of Community Services)

<http://www.acf.hhs.gov/programs/ocs/programs/community-economic-development/healthy-food-financing>

Supports projects that increase access to healthy, affordable food in communities that currently lack these options. HFFI will expand the availability of nutritious food, including developing and equipping grocery stores, small retailers, corner stores, and farmers markets selling healthy food.

Community Food Projects

<http://www.nifa.usda.gov/funding/cfp/cfp.html>

Community Food Projects fund proactive approaches to making communities more self-reliant at maintaining their food systems while addressing food, nutrition, and farm issues.

Conservation Reserve Program – Transition Incentives Program (USDA Farm Service Agency)

<https://www.fsa.usda.gov/FSA/webapp?area=home&subject=copr&topic=tipr>

Encourages landowners to sell or lease long-term to beginning or socially-disadvantaged farmers and ranchers willing to implement sustainable practices or transition to organic production by providing two years of additional payments for expiring CRP-enrolled land.

Direct Farm Ownership and Operating Loans (USDA. Farm Service Agency)

<https://www.fsa.usda.gov/FSA/webapp?area=home&subject=fmlp&topic=dfi>

This program provides financing and assistance to family farmers and ranchers to establish farms and ranches, achieve financial success, and graduate to commercial credit or self-financing. FO loans may be used for acquiring or enlarging a farm or ranch, making capital improvements, paying closing costs, and paying for soil and water conservation improvements, including sustainable agriculture practices and systems.

Economic Development Assistance Programs 2014 (Economic Development Administration)

<http://www.grants.gov/web/grants/view-opportunity.html?oppld=248297>

Provides investments that support construction, non-construction, technical assistance, and revolving loan fund projects under EDA's Public Works and Economic Adjustment Assistance programs. Grants and cooperative agreements made under these programs are designed to leverage existing regional

assets and support the implementation of economic development strategies that advance new ideas and creative approaches to advance economic prosperity in distressed communities.

Education and Job Training (Bank of the West)

<https://www.bankofthewest.com/about-us/community-support/charitable-investments.html>

Accepts letters of inquiry from nonprofit organizations dedicated to improving the quality of life, particularly for low- and moderate-income individuals and communities in the following charitable giving categories: 1) *Education and Job Training - Financial education and management training programs - Job training and vocational programs, including literacy and basic-skills education, for low- to moderate-income adults*, 2) *Community and Economic Development: - Creation, preservation or rehabilitation of affordable housing - Homeownership and credit counseling programs for low- to moderate-income individuals - Financing services and technical assistance programs for small businesses and farms - Asset creation and preservation programs for low- to moderate-income individuals.*

Farm Business Management and Benchmarking Competitive (USDA. National Institute of Food and Agriculture (NIFA))

<http://www.csrees.usda.gov/fo/farmbusinessmanagementandbenchmarkingprogram.cfm>

The Farm Business Management and Benchmarking (FBMB) Competitive Grants Program provides funds to (1) improve the farm management knowledge and skills of agricultural producers; and (2) establish and maintain a national, publicly available farm financial management database to support improved farm management.

Farm Loan Programs (USDA Farm Service Agency)

<http://www.fsa.usda.gov/FSA/webapp?area=home&subject=fmlp&topic=landing>

- **Direct Loans** Provides government loans to allow family farmers, including beginning and socially disadvantaged farmers, purchase farmland, equipment, and other start-up and production necessities.
- **Guaranteed Loans** Provides a government guarantee on commercial loans to family farmers, including beginning and socially disadvantaged farmers, for real estate costs or farm operating expenses.
- **Down Payment Loans** Provides a low-interest government loan, made in conjunction with a private bank loan and a borrower down payment, to help beginning, minority, and women farmers purchase a farm or ranch.
- **Land Contract Guarantee** Reduces risk for retiring farmers who sell land via a multi-year land contract to beginning or socially disadvantaged farmers by providing a federal guarantee in case the buyer encounters problems making payments.
- **Microloans** Provides small farm loans (up to \$50,000) for annual operating expenses tailored for small, young, beginning, socially disadvantaged, and veteran farmers and diversified farming operations serving local markets.

Farm to School Grant Program (USDA)

<http://www.fns.usda.gov/farmtoschool/farm-school-grant-program>

USDA Farm to School Grant Program is to assist eligible entities in implementing farm to school programs that improve access to local foods in eligible schools. On an annual basis, USDA awards up to \$5 million in competitive grants for training, supporting operations, planning, purchasing equipment, developing school gardens, developing partnerships, and implementing farm to school programs.

Farmers Market Promotion Program (USDA)

www.ams.usda.gov/AMSV1.0/FMPP

The goals of FMPP grants are to increase domestic consumption of, and access to, locally and regionally produced agricultural products, and to develop new market opportunities for farm and ranch operations serving local markets by developing, improving, expanding, and providing outreach, training, and technical assistance to, or assisting in the development, improvement, and expansion of, domestic farmers markets, roadside stands, community-supported agriculture programs, agritourism activities, and other direct producer-to-consumer market opportunities.

Idaho Community Development Block Grants Economic Development Projects (Idaho Dept. of Commerce)

<http://commerce.idaho.gov/communities/community-grants/community-development-block-grant-cdbg>

Public facility construction and improvements that support companies who are expanding and creating new jobs or new companies that will be creating jobs. Applications are due quarterly: March, June, September and December.

Local Food Enterprise Loans (USDA Rural Development)

http://www.rurdev.usda.gov/rbs/busp/b&i_gar.htm

USDA provides loans to help improve, develop, or finance businesses and employment in rural areas by bolstering the existing private credit market through federal guarantees. Loans can be used to support farm and ranch incomes as well as the renewal of local food system infrastructure and community development. Loans can be used to support and establish enterprises that process, distribute, aggregate, store, and market foods produced either in-state or transported less than 400 miles from the origin of the product. Priority will be given to projects that in some way benefit communities with limited access to affordable and healthy foods and that have a high rate of hunger, food insecurity, or poverty.

Local Food Promotion Program (USDA)

<http://www.ams.usda.gov/AMSV1.0/LFPP>

LFPP offers grant funds with a 25% match to support the development and expansion of local and regional food business enterprises to increase domestic consumption of, and access to, locally and regionally produced agricultural products, and to develop new market opportunities for farm and ranch operations serving local markets. Eligible entities may apply if they support local and regional food business enterprises that process, distribute, aggregate, or store locally or regionally produced food products.

Two types of project applications are accepted under LFPP:

- **LFPP Planning Grants** are used in the planning stages of establishing or expanding a local and regional food business enterprise.
- **LFPP Implementation Grants** are used to establish a new local and regional food business enterprise, or to improve or expand an existing local or regional food business enterprise.

National Heritage Areas Program (National Park Service)

www.cr.nps.gov/heritageareas/

National Heritage Areas are individually authorized by Congress and receive funding, technical assistance, and management support from the National Park Service. Heritage area designation provides a vehicle for promoting local economic and cultural vitality by capitalizing on an area’s heritage assets, particularly through heritage tourism.

National Register of Historic Places "Discover Our Shared Heritage" Travel Itineraries (National Park Service)

www.cr.nps.gov/nr/travel/

Maps and travel itineraries (printed and online) have been developed linking National Register properties on a thematic or regional basis. To date there are 30 itineraries online.

National Scenic Byways Program (Federal Highway Administration)

www.byways.org

This program provides technical and financial assistance to help preserve America’s scenic roads and promote tourism and economic development. Grants are available to assist states in implementing projects on National Scenic Byways and developing state scenic byways. The national scenic byways system currently includes 125 nationally designated byways; approximately 400 additional scenic byways are recognized at the state level.

National Trails System (National Park Service and Bureau of Land Management [with USDA Forest Service])

www.nps.gov/ncrc/programs/nts/

Today, the National Trails System is comprised of eight national scenic trails, 18 national historic trails, and more than 1,050 national recreation trails. Although designated by Congress and administered by federal agencies, ownership may be public or private.

Public Works, Economic Adjustment, Planning, and Research and Technical Assistance Programs (US Dept. of Commerce Economic Development Administration)

www.eda.gov

Grants from these programs assist communities in infrastructure development, local capacity building, and business development to help alleviate conditions of substantial and persistent unemployment in economically distressed areas and regions. Rehabilitation of historic properties is an eligible activity if there is significant job creation.

Recreational Trails Program Grants (Federal Highway Administration)

www.fhwa.dot.gov/environment/rectrails/index.htm

These grants can be used to maintain, restore, and rehabilitate trails, including National Historic Trails, and rehabilitate trailside facilities. They can also support acquisition of easements or titles to property for trails, including acquisition of old road or railroad bridges to be used as recreational trail bridges.

Research & Education: Professional Development Grants (Western Sustainable Ag Research and Education (WSARE))

<http://www.westernsare.org/Grants/Types-of-Grants>

Professional Development Program Grants are designed to educate agricultural professionals about sustainable agriculture so that they, in turn, can help educate and train farmers and ranchers. Projects must improve the ability of agricultural professionals to conduct educational programs and activities in sustainable agriculture principles and systems and to respond to inquiries on the subject from farmers, ranchers and the public.

Resource Conservation and Development Program (USDA Natural Resources Conservation Service)

<http://www.nrcs.usda.gov/programs/rcd/>

This program provides technical and limited financial assistance to assist more than 300 local RC&D Councils with development projects, including heritage tourism and related business development.

Rivers, Trails, and Conservation Assistance Program (National Park Service)

www.nps.gov/rtca/

This program provides assistance to local and state agencies and private organizations working on river and trail corridor projects. No grant funding is currently available, but the program assists partners in planning and finding appropriate project funding. Specific assistance is given for river, trail, and greenway planning, regional assessments of potential trail corridors, conservation workshops, and expert consultations on related issues. The program publishes success stories and “best practices.”

Rural Business Enterprise Grants (RBEG) (USDA)

http://www.rurdev.usda.gov/bcp_rbeg.html

The RBEG program provides grants for rural projects that finance and facilitate development of small and emerging rural businesses help fund distance learning networks, and help fund employment related adult education programs. To assist with business development, RBEGs may fund a broad array of activities.

Rural Business Opportunity Grants (USDA)

http://www.rurdev.usda.gov/BCP_RBOG.html

The RBOG program promotes sustainable economic development in rural communities with exceptional needs through provision of training and technical assistance for business development, entrepreneurs, and economic development officials and to assist with economic development planning.

Rural Community Development Initiative (USDA)

http://www.rurdev.usda.gov/had-rcdi_grants.html Provides technical assistance and training funds to qualified intermediary organizations to develop their capacity to undertake housing, community facilities, and community and economic development projects in rural areas.

Rural Cooperative Development Grant Program (RCDG) (USDA)

http://www.rurdev.usda.gov/BCP_RCDG.html

Rural Cooperative Development grants are made for establishing and operating centers for cooperative development for the primary purpose of improving the economic condition of rural areas through the development of new cooperatives and improving operations of existing cooperatives.

Rural Housing and Economic Development Grants (US Dept. of Housing and Urban Development)

www.hud.gov/offices/cpd/economicdevelopment/programs/rhed/index.cfm

These grants assist in capacity building at the state and local level for rural housing and economic development and support innovative housing and economic development activities in rural areas. They can fund projects involving heritage tourism and economic development through use of historic properties.

Small Socially-Disadvantaged Producer Grant (SSDPG) (USDA)

http://www.rurdev.usda.gov/BCP_SSDPG.html

The purpose of this section is to assist in the development of new and emerging technologies for the development of advanced biofuels.

Training Programs (Small Business Administration)

www.sba.gov/training/

The Small Business Administration does not provide direct loans or grants (although it guarantees loans), but it does provide entrepreneurs with training materials and opportunities that could support heritage tourism and business development using historic buildings.

Transportation and Transit Enhancements Programs (Federal Highway Administration and Federal Transit Administration)

www.fhwa.dot.gov/environment/te/index.htm

Ten percent of Federal Surface Transportation Program funds and 1 percent of federal urban mass transit funds are set aside to fund transportation enhancements. Such funding can be used for historic preservation projects and programs related to historic transportation routes, systems, facilities, etc. Heritage tourism trails may be funded at state discretion.

Value-Added Producer Grants (USDA)

http://www.rurdev.usda.gov/BCP_VAPG.html

Grants may be used for planning activities and for working capital for marketing value-added agricultural products and for farm-based renewable energy. Eligible applicants are independent producers, farmer and rancher cooperatives, agricultural producer groups, and majority-controlled producer-based business ventures.

Walmart Foundation Community Giving

<http://foundation.walmart.com/>

- **Education:** addressing the educational needs of underserved young people between the ages of 12 and 25;
- **Workforce:** development/economic opportunity, providing job readiness and skills training as well as support services for workers with low to moderate skills;

- **Environmental sustainability:** promoting production systems that sustain people and the environment by reducing waste and promoting energy efficiency and the use of renewable resources; and
- **Health and Wellness:** improving access to health care, reducing healthcare disparities, and promoting nutrition.

Wells Fargo Corporate Giving—Idaho

https://www.wellsfargo.com/about/charitable/id_guidelines.jhtml

Community Development: support the improvement of low- and moderate-income communities through programs that

1. Create and sustain affordable housing
2. Promote economic development by financing small businesses or small farms
3. Provide job training and workforce development
4. Revitalize and stabilize communities

Education: support organizations that

1. Promote academic achievement for low- and moderate-income students with a focus on math, literacy, and science and technology
2. Provide training for teachers and administrators working with low- and moderate-income students
3. Encourage school partnerships with parents and guardians, the local community, and the business community. *(Included as a source to potentially fund programs to help build/support 'Farm-to-School' activities)*

WIC Farmers' Market Nutrition Program (USDA)

<http://www.fns.usda.gov/fmnp>

The WIC Farmers' Market Nutrition Program (FMNP) is associated with the Special Supplemental Nutrition Program for Women, Infants and Children, popularly known as WIC. The WIC Program provides supplemental foods, health care referrals and nutrition education at no cost to low-income pregnant, breastfeeding and non-breastfeeding post-partum women, and to infants and children up to 5 years of age, who are found to be at nutritional risk.

WIC Senior Farmers Market Nutrition Program (USDA)

<http://www.fns.usda.gov/sfmnp>

The purposes of this program are to: (1) Provide resources in the form of fresh, nutritious, unprepared, locally grown fruits, vegetables, honey and herbs from farmers markets, roadside stands and community supported agriculture programs to low-income seniors; (2) Increase the domestic consumption of agricultural commodities by expanding or aiding in the expansion of domestic farmers markets, roadside stands, and community supported agriculture programs, and; (3) Develop or aid in the development of new and additional farmers markets, roadside stands, and community supported agriculture programs.



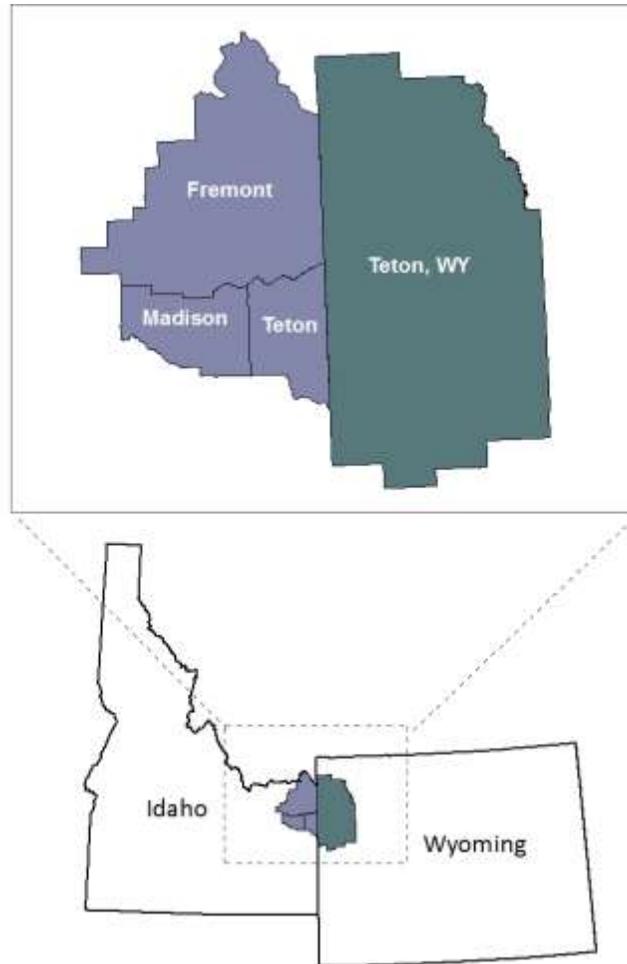
Appendix A: Food buyer interview guide

Local food: food that is produced within 100 miles of your location.

1. Does your organization currently purchase local food?
 - a. **If yes:**
 - i. From whom does your organization purchase local food?
 - ii. How does your organization access local food?
 1. Do you purchase food directly from producers? How many?
 - a. What are the advantages/disadvantages to buying directly from producers?
 2. Do you purchase food through distributors? Who?
 - a. What are the advantages/disadvantages to buying directly from distributors?
 3. Do you have other means of purchasing local foods?
 - iii. What foods does your organization purchase locally? (Follow up series: does your organization purchase any dairy products/meat/produce/value-added products?)
 1. How much of these foods does your organization purchase (pounds, dollars, etc.)?
 2. When/how often does your organization purchase these foods?
 - iv. Are there foods that your organization is interested in purchasing locally that it doesn't already?
 1. What keeps your organization from purchasing these foods locally?
 - v. Is your organization interested in increasing the amount of local food you purchase? Why or why not?

- vi. When making food purchases, are any special qualities (e.g., organic, sustainable, Humane Animal Treatment Certified, grass fed, antibiotic free, pesticide free, free range, other) important to your organization:?
 - vii. Does your organization require or prefer suppliers have any food safety certifications?
 - viii. What are your organization's primary challenges of buying local food?
 - ix. What are the primary advantages of buying local food?
 - x. What are the primary disadvantages of buying local food?
- b. If no:**
- i. Is your organization interested in purchasing local food? Why/why not?
 - ii. What types of foods is your organization interested in purchasing locally? (Dairy products, meat, produce, value-added, other)
 - 1. How much of these foods would your organization purchase?
 - 2. When/how often would your organization buy these foods?
 - iii. Would your organization buy local food directly from producers? Why/why not?
 - iv. Would your organization buy local food through distributors? Why/why not?
 - v. When making food purchases, are any of these qualities important to your organization: organic, sustainable, Humane Animal Treatment Certified, grass fed, antibiotic free, pesticide free, free range, other?
 - vi. Does your organization require or prefer suppliers have any food safety certifications?
 - vii. What are the primary challenges of buying local food?
 - viii. What are the primary advantages of buying local food?
 - ix. What are the primary disadvantages of buying local food?

Teton View Regional Plan: Food Buyer Survey



Welcome to the Teton View Regional Plan: Food Buyer Survey!

The goal of this survey is to better understand local food buyers' perspectives on purchasing food produced locally. The survey is part of a larger project to assess potential local agriculture-related economic development strategies in Teton, Fremont, and Madison counties in Idaho and Teton County, WY. Generally we hope to learn what opportunities may exist for local food producers to sell more of their products to local organizations and businesses and what best strategies for marketing and selling local products to local buyers may be.

This project is being conducted by the High Country Resource Conservation and Development Area, Inc. and researchers from the University of Idaho. The results of our assessment will be

incorporated into the Teton View Regional Plan for Sustainable Development and made available to participants.

The questions should only take about 10 minutes to complete. Your responses are voluntary and will be kept confidential. If you have any questions about this survey, please contact Soren Newman at 208-885-4017 or newman@uidaho.edu. This study has been certified exempt by the University of Idaho Institutional Review Board.

As a food buyer in our region, your perspective is important. We appreciate your help!

Sincerely,

Pam Herdrich
Executive Coordinator
High Country RC&D, Inc.
P.O. Box 501, 101 N Bridge Street
St. Anthony, ID 83445
208-624-3200

Q1. Please select the option that best describes your business or organization. *Please note that in the following questions we shorten the phrase 'business or organization' to the term 'business.'*

- Bakery
- Catering
- Coffee shop
- Convenience store
- Conventional supermarket or grocery store
- Food co-op/cooperative grocery store
- Natural food market/grocery
- Restaurant
- Hospital
- School (primary or secondary)
- University/College/Higher education
- Other—please specify: _____

Q2. What is your position in your business? *For example, owner, manager, food service director, etc.*

_____ Position

Q3. In what town or city is your business located?

_____ Name of town or city

Q4. Please select the best answer to complete this statement about purchasing the following food products: “My business currently...”

	...purchases this product locally, OR is interested in purchasing it locally	...purchases this product, but is NOT interested in purchasing it locally	...does NOT purchase this product, and is NOT interested in purchasing it locally
Apples	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Berries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carrots	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cherries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cucumbers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dry beans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dry peas and lentils	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Garlic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grapes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Green beans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Herbs (e.g., basil, mint)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Honey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leafy greens	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Melons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Onions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Peaches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Peas, green	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pears	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pecans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Peppers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Potatoes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Squash, summer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Squash, winter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sweet corn	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tomatoes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other(s)—Please specify:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q5. Please select the best answer to complete this statement about purchasing the following food products: “My business currently...”

	...purchases this product locally, OR is interested in purchasing it locally	...purchases this product, but is NOT interested in purchasing it locally	...does NOT purchase this product, and is NOT interested in purchasing it locally
Beef	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chicken	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chicken eggs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Duck	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Duck eggs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Elk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fish	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goat	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goose	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goose eggs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pheasant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pheasant eggs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pork	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quail eggs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sheep/lamb	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Turkey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other— Please specify:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other— Please specify:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q6. Please select the best answer to complete this statement about purchasing the following value-added or processed food products: “My business currently...”

	...purchases this product locally, OR is interested in purchasing it locally	...purchases this product, but is NOT interested in purchasing it locally	...does NOT purchase this product, and is NOT interested in purchasing it locally
Beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bread	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cheese	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cow milk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goat milk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hard cider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jam/Jelly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pesto	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Potato chips	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Salsa	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sour cream	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tomato sauce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tortilla chips	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yogurt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q7. Please indicate the form in which your business purchases or is interested in purchasing the following types of products. You may select all that apply.

	Fresh	Canned	Frozen	Dried	Other	Not applicable
Fruits and berries	<input type="radio"/>					
Vegetables	<input type="radio"/>					
Meats	<input type="radio"/>					
Herbs	<input type="radio"/>					

Q8. In an average year, approximately what percent of your business's total food purchases are from local producers (i.e., within 100 miles of your business)?

- 0%
- 1%-10%
- 11%-25%
- 26%-50%
- 51%-75%
- 76%-100%

Q9. Is your business interested in increasing the quantity of locally produced food products it purchases?

- Yes
- No

Q10. Is your business interested in increasing the variety of locally produced food products it purchases?

- Yes
- No

Q11. Does your business require sellers to have any food safety certifications?

- Yes
- No

Q12. Does your business require sellers to have liability insurance?

- Yes
- No

Q13. When purchasing food products, how important or unimportant are the following characteristics to your business?

	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant
Locally grown (i.e., grown within 100 miles of your business)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regionally grown (i.e., grown farther than 100 miles but within 500 miles of your business)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pesticide free	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Humane Animal Treatment Certified	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grass fed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Antibiotic free	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free range	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Genetically Modified Organism (GMO) free	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other—please specify: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other—please specify: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other—please specify: _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q14. Does your business currently purchase food products directly from producers?

- Yes → **Go to Q16**
- No → **Continue to Q15**

Q15. Is your business interested in purchasing food products directly from producers?

- Yes → **Continue to Q16**
- No → **Go to Q17**

Q16. Does your business currently purchase, or would your business be interested in purchasing, food products directly from producers through any of the following venues?

	Yes	No
Mail order or Internet	<input type="radio"/>	<input type="radio"/>
On-site (e.g., farm stand, U-pick)	<input type="radio"/>	<input type="radio"/>
Farmers' markets	<input type="radio"/>	<input type="radio"/>
Other—Please specify: _____	<input type="radio"/>	<input type="radio"/>

Q17. Does your business purchase local food products (i.e., produced within 100 miles of your business) through a distributor?

- Yes → **Go to Q19**
- No → **Continue to Q18**

Q18. Is your business interested in purchasing local food products through a distributor?

- Yes
- No

Q19. To what extent do the following factors challenge the ability of your business to purchase or use LOCAL food products (i.e., produced within 100 miles of your operation)?

	Not a challenge	Moderate challenge	Significant challenge
Price of products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of specific products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to access products when needed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to access a large enough quantity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reliability of vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shelf life of local products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to communicate with sellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporate requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inadequate time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local or state regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Federal regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food safety issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledge of how or where to buy locally sourced products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other—Please specify: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q20. Do you have any additional comments about any of the above topics or the survey itself?

The results of this survey will be part of a report assessing the potential for local food system-related economic development in Fremont, Madison, and Teton counties in Idaho and Teton County, WY. The report will be incorporated into the Teton View Regional Plan for Sustainable Development and shared with any local food producers and potential buyers who are interested in receiving the findings.

Q21. In the final report, would you like us to include the name of your business in a list of businesses that are interested in purchasing products from local producers? *To ensure confidentiality, answers to this question will be removed from the survey and will not be linked to survey data. If you choose to provide the information below, your business name and other identifying information will not be associated with your responses in any reports of this data.*

- Yes—please contact Soren Newman at newman@uidaho.edu or provide the name of your business here:

Business Name: _____

Contact's Name: _____

- No

Q22. Would you like to receive a copy of the final report? *To ensure confidentiality, answers to this question will be removed from the survey and will not be linked to survey data.*

- Yes —please contact Soren Newman at newman@uidaho.edu or provide your email address:

Email address: _____

- No

Appendix C: Producer interview guide

1. What are the main revenue sources for your operation (that is, what you primarily produce for sale)?
2. Where (geographically) do you primarily sell products from your operation?
 - a. Do you sell products from your operation locally (that is, to buyers within 100 miles of your operation)?
 - i. What products do you sell locally?
3. What venues do you use to sell your products—for example, farm stand; farmers' market; Community Supported Agriculture (CSA); direct to retailers like supermarkets, schools, restaurants; through wholesale markets like livestock auctions; through distributors; grower cooperative; etc.?
4. Are you interested in increasing the quantity or diversifying the types of products you sell locally? Why/why not? What products?
5. To what extent are other producers in your area interested in increasing the quantity or diversifying what they sell locally?
6. To what extent are buyers (e.g., restaurants, grocers, schools, hospitals, etc.) interested in increasing the quantity or diversity of what they purchase from local producers?
7. What has worked well in terms of marketing and selling your products locally?
 - a. Have you experienced any successes marketing or selling your products locally?
 - b. Is there anyone or anything that has been helpful in terms of selling products locally?
8. Overall, what do you see as the primary benefits of selling products locally?
9. Overall, what are the primary challenges of selling products locally?
10. Is there anything that would make it easier for you (or motivate you) to sell your products locally?
 - a. Is there any information that would help you in terms of marketing and selling your products locally?
11. Overall, what do you think it would take to develop opportunities for producers in Fremont, Madison, and Teton counties in Idaho and Teton County, WY to sell products locally?
12. Do you have anything else you would like to say?

Appendix D: Producer focus group guide

Welcome

13. Facilitators introduce themselves.
14. Thank you for participating in this focus group. This focus group is part of a study the High Country Resource Conservation and Development Area is doing to evaluate opportunities for agriculture-based economic development in Fremont, Madison, and Teton counties in Idaho and Teton County, Wyoming. We are also doing a survey of producers, interviewing producers, interviewing potential buyers, and surveying potential buyers. Our goal for this focus group is to understand your perspectives on growing, marketing, and selling food to local and regional buyers. By 'local' we mean markets within 100 miles of your operation and by 'regional' we mean markets farther than 100 miles but within 500 miles of your operation.
15. Focus group will last approximately 60-90 minutes.
16. We will keep all of your comments confidential, so please speak as openly as possible. With your permission we would like to audio record this focus group for note-taking purposes and so that we can later identify themes and compare and contrast what we learned across all three focus groups. The information we present in any reports will be general and will not include the names of focus group participants.
17. We want you to know that there are not right or wrong answers. It's important that everyone has an opportunity to share their thoughts and opinions. We want everyone to have fun and feel comfortable—you do not have to answer any questions that you do not want to answer and you are free to leave the focus group at any time. We ask that everyone respects each other's privacy and that no one repeats anything said during the focus groups to anyone once the discussion is over.
18. Before we begin does anyone have any questions, comments, or concerns?

Introductions (10 minutes)

19. To start lets go around the group and share your first names and your main revenue sources for your operation (that is, what you primarily produce for sale).

Marketing, distribution, and sales (15-20 minutes)

20. Where (geographically) do you primarily sell products from your operation?
 - a. Do you sell products from your operation locally (that is, to buyers within 100 miles of your operation)?
 - i. What products do you sell locally?
21. What venues do you use to sell your products—for example, farm stand; farmers' market; Community Supported Agriculture (CSA); direct to retailers like supermarkets, schools, restaurants; through wholesale markets like livestock auctions; through distributors; grower cooperative; etc.?
22. Are you interested in increasing the quantity or diversifying the types of products you sell locally? Why/why not? What products?
23. To what extent are other producers in your area interested in increasing the quantity or diversifying what they sell locally?

24. To what extent are buyers (e.g., restaurants, grocers, schools, hospitals, etc.) interested in increasing the quantity or diversity of what they purchase from local producers?

Benefits and facilitators (15-20 minutes)

25. What has worked well in terms of marketing and selling your products locally?

- a. Have you experienced any successes marketing or selling your products locally?
- b. Is there anyone or anything that has been helpful in terms of selling products locally?

26. Overall, what do you see as the primary benefits of selling products locally?

Drawbacks and challenges (15-20 minutes)

27. Overall, what are the primary challenges of selling products locally?

28. Is there anything that would make it easier for you (or motivate you) to sell your products locally?

- a. Is there any information that would help you in terms of marketing and selling your products locally?

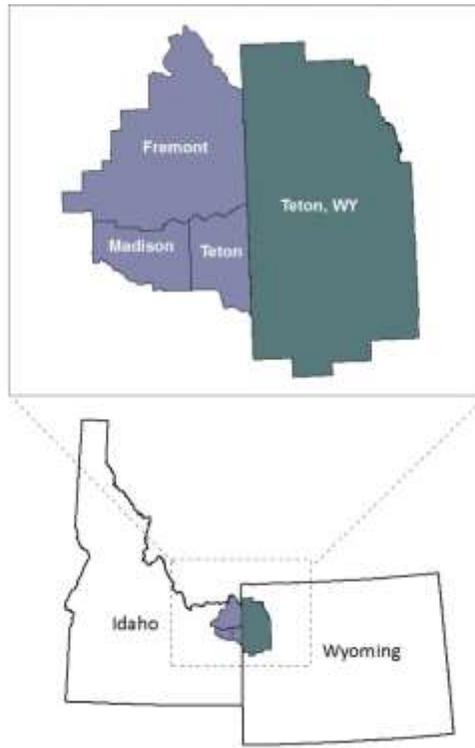
Other comments (10 minutes)

29. Overall, what do you think it would take to develop opportunities for producers in Fremont, Madison, and Teton counties in Idaho and Teton County, WY to sell products locally?

30. Do you have anything else you would like to say?

Appendix E: Producer survey

Teton View Regional Plan: Agriculture Survey



The High Country Resource Conservation and Development Area, Inc. and researchers from the University of Idaho are evaluating opportunities for local and regional agricultural production and marketing in Fremont, Madison and Teton counties in Idaho and Teton County, WY. The results of our evaluation will be incorporated into the Teton View Regional Plan for sustainable economic development.

As a producer in our region, your perspectives are important. The goal of this survey is to incorporate your insights into the evaluation. The questions should only take about 10 minutes to complete.

Your responses are voluntary and will be kept confidential. If you have any questions about this survey, please contact Soren Newman at 208-885-4017 or newman@uidaho.edu. This study has been certified exempt by the University of Idaho Institutional Review Board.

We appreciate your help!

Sincerely,

Pam Herdrich
Executive Coordinator
High Country RC&D, Inc.
P.O. Box 501, 101 N Bridge Street

Q1. Approximately how many total acres is your operation?

- Less than 1 acre
- 1-9 acres
- 10-49 acres
- 50-179 acres
- 180-499 acres
- 500 acres or more

Q2. Of the total acres in your operation, approximately how many are cropland?

- None
- Greater than none, but less than 1 acre
- 1-9 acres
- 10-49 acres
- 50-179 acres
- 180-499 acres
- 500 acres or more

Q3. Of the total acres in your operation, approximately how many are pastureland and/or rangeland?

- None
- Greater than none, but less than 1 acre
- 1-9 acres
- 10-49 acres
- 50-179 acres
- 180-499 acres
- 500 acres or more

Q4. Does your operation produce any vegetables, fruits, nuts, or berries?

- Yes —> **Continue to Q5**
- No —> **Go to Q7**

Q5. In an average year, approximately how much of the following products does your operation produce for sale? *Please write '0' for any vegetables, fruits, nuts, or berries your operation does not produce.*

Product	Total quantity sold	Unit
Apples		Lbs.
Blackberries		Lbs.
Blueberries		Lbs.
Carrots		Lbs.
Cherries		Lbs.
Grapes		Lbs.
Green beans		Lbs.
Leafy greens		Lbs.
Melons		Lbs.
Onions		Lbs.
Peaches		Lbs.
Peas, green		Lbs.
Pears		Lbs.
Pecans		Lbs.
Peppers		Lbs.
Potatoes		Lbs.
Raspberries		Lbs.
Strawberries		Lbs.
Squash		Lbs.
Sweet corn		Lbs.
Tomatoes		Lbs.
Other—please specify:		Lbs.
Other—please specify:		Lbs.
Other—please specify:		Lbs.

Q6. In an average year, when does your operation have vegetables, fruits, nuts, or berries available to sell? *Please select all answers that apply.*

- | | |
|-----------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> July |
| <input type="checkbox"/> February | <input type="checkbox"/> August |
| <input type="checkbox"/> March | <input type="checkbox"/> September |
| <input type="checkbox"/> April | <input type="checkbox"/> October |
| <input type="checkbox"/> May | <input type="checkbox"/> November |
| <input type="checkbox"/> June | <input type="checkbox"/> December |

Q7. Does your operation produce any field crops (for example, herbs, wheat, corn, canola, hay, dry peas)?

- Yes → **Continue to Q8**
- No → **Go to Q10**

Q8. In an average year, approximately how much of the following field crops does your operation produce for sale? Please write '0' for any field crops your operation does not produce.

Product	Total quantity sold	Unit
Barley		Bu.
Beans (dry)		Bu.
Canola and other oilseeds		Lbs.
Corn for grain		Bu.
Corn for silage or greenchop		Tons
Dry peas and lentils		Cwt.
Hay		Tons
Herbs (e.g., basil, mint)		Lbs.
Hops		Lbs.
Oats		Bu.
Sugar beets for sugar		Tons
Wheat		Bu.
Other field crops—please specify:		
Other field crops—please specify:		
Other field crops—please specify:		

Q9. In an average year, when does your operation have field crops available to sell? Please select all answers that apply.

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Q10. Does your operation produce any livestock or milk?

Yes —> **Continue to Q11**

No —> **Go to Q13**

Q11. In an average year, approximately how much of the following livestock or milk does your operation produce for sale? Please write '0' for any livestock or milk your operation does not produce.

Product	Total quantity sold	Unit
Cattle and calves		
Beef cows		Head
Cow milk		Lbs.
Hogs and pigs		
Sheep and goats		
Sheep and lambs (meat)		Head
Goats and kids (meat)		Head
Goat milk		Lbs.
Elk (meat)		Head
Other—Please specify: _____		
Other—Please specify: _____		
Other—Please specify: _____		

Q12. When does your operation have livestock or milk available to sell? Please select all answers that apply.

- | | |
|-----------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> July |
| <input type="checkbox"/> February | <input type="checkbox"/> August |
| <input type="checkbox"/> March | <input type="checkbox"/> September |
| <input type="checkbox"/> April | <input type="checkbox"/> October |
| <input type="checkbox"/> May | <input type="checkbox"/> November |
| <input type="checkbox"/> June | <input type="checkbox"/> December |

Q13. Does your operation produce any poultry products?

- Yes → Continue to Q14
- No → Go to Q16

Q14. In an average year, approximately how much of the following poultry products does your operation produce for sale? Please write '0' for any poultry your operation does not produce.

Product	Total quantity sold	Unit
Chickens (broilers)		Number
Chicken eggs		Doz.
Ducks		Number
Duck eggs		Doz.
Geese		Number
Geese eggs		Doz.
Pheasants		Number
Pheasant eggs		Doz.
Quail		Number
Quail eggs		Doz.
Turkeys		Number
Other—please specify:		
Other—please specify:		
Other—please specify:		

Q15. In an average year, when does your operation have poultry products available to sell? Please select all answers that apply.

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Q16. Does your operation produce honey?

- Yes → Continue to Q17
- No → Go to Q19

Q17. In an average year, approximately how many pounds of honey does your operation produce for sale?

_____ lbs. of honey

Q18. In an average year, when does your operation have honey available to sell? *Please select all answers that apply.*

- | | |
|-----------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> July |
| <input type="checkbox"/> February | <input type="checkbox"/> August |
| <input type="checkbox"/> March | <input type="checkbox"/> September |
| <input type="checkbox"/> April | <input type="checkbox"/> October |
| <input type="checkbox"/> May | <input type="checkbox"/> November |
| <input type="checkbox"/> June | <input type="checkbox"/> December |

Q19. Does your operation produce game animals (deer, elk, quail, pheasant, etc.) for hunting on private property or release on public lands?

- Yes—please specify game animal(s) produced for hunting or release:

- No

Q20. Does your operation produce fiber products (e.g., wool) or other secondary animal products (e.g., antlers, horns, hides, leather, feathers, etc.) for sale?

- Yes → Continue to Q21
- No → Go to Q22

Q21. In an average year, approximately how much of the following fiber products or other secondary animal products does your operation produce for sale? Please write '0' for any fiber products or other secondary animal products your operation does not produce.

Product	Total quantity sold	Unit
Alpaca fiber		Lbs.
Angora wool		Lbs.
Cashmere wool		Lbs.
Mohair		Lbs.
Sheep wool		Lbs.
Antlers		Lbs.
Feathers		Lbs.
Horns		Lbs.
Leather		Lbs.
Other—please specify:		
Other—please specify:		
Other—please specify:		

Q22. In an average year, approximately what percent of your operation's total first point of sales are sold locally, regionally, nationally, and internationally?

	0%	1%- 25%	26%- 50%	51%- 75%	76%- 100%
Locally (within 100 miles)	<input type="checkbox"/>				
Regionally (more than 100 miles but less than 500 miles)	<input type="checkbox"/>				
Nationally (500 miles or farther within U.S.)	<input type="checkbox"/>				
Internationally	<input type="checkbox"/>				

Q23. In an average year, approximately what percent of the total products from your operation are consumed locally, regionally, nationally, and internationally? Please provide your best estimate.

	0%	1%- 25%	26%- 50%	51%- 75%	76%- 100%
Locally (within 100 miles)	<input type="checkbox"/>				
Regionally (more than 100 miles but less than 500 miles)	<input type="checkbox"/>				
Nationally (500 miles or farther within U.S.)	<input type="checkbox"/>				
Internationally	<input type="checkbox"/>				

Q24. Are you interested in increasing the quantity or variety of products you sell to local or regional markets?

- Yes
- No

Q25. If your operation sells products locally or regionally, in what cities, towns, or counties are your primary buyers located? _____

Q26. Does your operation market through any of the following venues to sell your products? Please select all that apply.

Consumer direct sales

- On-site (e.g., farm stand, U-pick)
- Farmers' markets
- Community Supported Agriculture (CSA) shares
- Mail order or Internet

Direct-to-retail

- Food Co-op/Cooperative grocery store
- Natural food market/grocery
- Conventional supermarkets
- Restaurants or caterers
- Institutions (e.g., hospitals, schools)

Wholesale markets

- Natural food store chain buyer
- Conventional supermarket chain buyer
- Processor, mill, or packer
- Distributor, wholesaler, broker, or repacker
- Sales to other farm operations
- Grower cooperative
- Livestock auction

Other—please specify: _____

Q27. Does your operation produce and sell any processed or value-added food products (e.g., bottled milk, cheese, processed meat, flour, wine, jam, jelly)?

- Yes → **Continue to Q28**
- No → **Go to Q29**

Q28. What value-added food products does your operation produce and sell? Please select all that apply.

- | | |
|---------------------------------------|---|
| <input type="checkbox"/> Bottled milk | <input type="checkbox"/> Processed meat |
| <input type="checkbox"/> Bread | <input type="checkbox"/> Salsa |
| <input type="checkbox"/> Cheese | <input type="checkbox"/> Sour cream |
| <input type="checkbox"/> Flour | <input type="checkbox"/> Tortilla chips |
| <input type="checkbox"/> Jam/Jelly | <input type="checkbox"/> Yogurt |
| <input type="checkbox"/> Pesto | <input type="checkbox"/> Wine |
| <input type="checkbox"/> Other—Please | |

specify: _____

Q29. Does your operation produce or grow any vegetables, fruits, livestock, nuts, field crops, or poultry with the following characteristics?

	Yes	No
Pesticide free	<input type="checkbox"/>	<input type="checkbox"/>
Organic	<input type="checkbox"/>	<input type="checkbox"/>
Humane Animal Treatment Certified	<input type="checkbox"/>	<input type="checkbox"/>
Grass fed	<input type="checkbox"/>	<input type="checkbox"/>
Antibiotic free	<input type="checkbox"/>	<input type="checkbox"/>
Free range	<input type="checkbox"/>	<input type="checkbox"/>
Other (Please specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>

Q30. Do you currently sell or are you interested in selling products locally (within 100 miles)?

- Yes → **Continue to Q31**
- No → **Go to Q32**

Q31. To what extent do the following factors challenge the ability of your operation to market products locally (within 100 miles)?

	Not a challenge	Moderate challenge	Significant challenge
Ability to supply products year-round	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to produce a large enough quantity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of a dependable market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to access the market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to communicate with potential buyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledge of restaurants'/foodservices' purchasing practices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price issues (low premiums, lack of price information, prices inconsistent, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of labor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to transport/deliver products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of distribution system for local products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equipment and storage costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to capital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inadequate time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local, state regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Federal regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food safety issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of USDA-inspected slaughter and processing options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inadequate local processing facilities for value-added products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other—Please specify: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q32. Do you currently sell or are you interested in selling products regionally (more than 100 miles, but less than 500 miles)?

- Yes → **Continue to Q33**
- No → **Go to Q34**

Q33. To what extent do the following factors challenge the ability of your operation to market products regionally (more than 100 miles, but less than 500 miles)?

	Not a challenge	Moderate challenge	Significant challenge
Ability to supply products year-round	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to produce a large enough quantity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of a dependable market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to access the market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to communicate with potential buyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledge of restaurants'/foodservices' purchasing practices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price issues (low premiums, lack of price information, prices inconsistent, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of labor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to transport/deliver products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of distribution system for regional products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equipment and storage costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to capital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inadequate time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local, state regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Federal regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food safety issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of USDA-inspected slaughter and processing options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inadequate local processing facilities for value-added products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other—Please specify: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q34. Where is your operation located? *Please select all that apply.*

- Bonneville County, Idaho
- Clark County, Idaho
- Fremont County, Idaho
- Jefferson County, Idaho
- Lincoln County, Wyoming
- Madison County, Idaho
- Park County, Wyoming
- Teton County, Idaho
- Teton County, Wyoming
- Other—Please specify: _____

Q35. In an average year, approximately what is the gross value of sales of all agricultural products from your operation?

- None
- \$1-\$999
- \$1,000-\$2,499
- \$2,500-\$4,999
- \$5,000-\$9,999
- \$10,000-\$24,999
- \$25,000-\$49,999
- \$50,000-\$99,999
- \$100,000-\$249,999
- \$250,000 or more

Q36. What is the gender of the primary operator of your operation? *The primary operator is the person primarily responsible for the day-to-day operation of the farm.*

- Male
- Female
- Other

Q37. What is the age of the primary operator of your operation?

_____ Years

Q38. What is the race/ethnicity of the primary operator of your operation? *Please select all that apply.*

- White
- Hispanic origin (of any race)
- American Indian/Native American/Alaska Native
- African American/Black
- Asian/Pacific Islander
- Other

Q39. Does your operation have a secondary operator?

- Yes → **Continue to Q40**
- No → **Go to Q43**

Q40. What is the gender of the secondary operator of your operation?

- Male
- Female
- Other

Q41. What is the age of the secondary operator of your operation?

_____Years

Q42. What is the race/ethnicity of the secondary operator of your operation? Please select all that apply.

- White
- Hispanic origin (of any race)
- American Indian/Native American/Alaska Native
- African American/Black
- Asian/Pacific Islander
- Other

Q43. Do you have any additional comments about any of the above topics or the survey itself?

Q44. Are you willing to be contacted for a follow-up interview to provide more in-depth information about opportunities for local and regional agricultural production and marketing? To ensure confidentiality, answers to this question will be removed from the survey and will not be linked to survey data.

Yes—please provide your name, email address, and phone number:

Name: _____

Email address: _____

Phone number: _____

No

Appendix F: Meat processor interview guide

1. How many animals do you process on average (week/month/year)?
 - a. Does it vary by season? What is the seasonality?
2. What is your business model?
 - a. Who does first point of sales? You or producer?
3. How long have you been in business?
 - a. How long have you been USDA-inspected?
4. Do you have the capacity to increase the number of animals you process?
 - a. When?
5. How far do producers travel to access USDA-inspected processing? Approximately how far do your clients typically travel?
6. To what extent do you think livestock producers in the area are interested in selling their products locally?
 - a. What do you see as the primary opportunities for marketing and selling meat products locally?
7. To what extent do you think buyers are interested in purchasing locally?
8. How do you market/sell products locally?
 - a. What has worked well?
9. What barriers have you encountered in your processing business?
 - a. How can these barriers be overcome?
10. Over all what do you think it would take to develop opportunities for producers to sell more of their livestock/meat products locally?