

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

Farm-to-Table Trade Meeting
Market Trends in Response to COVID-19
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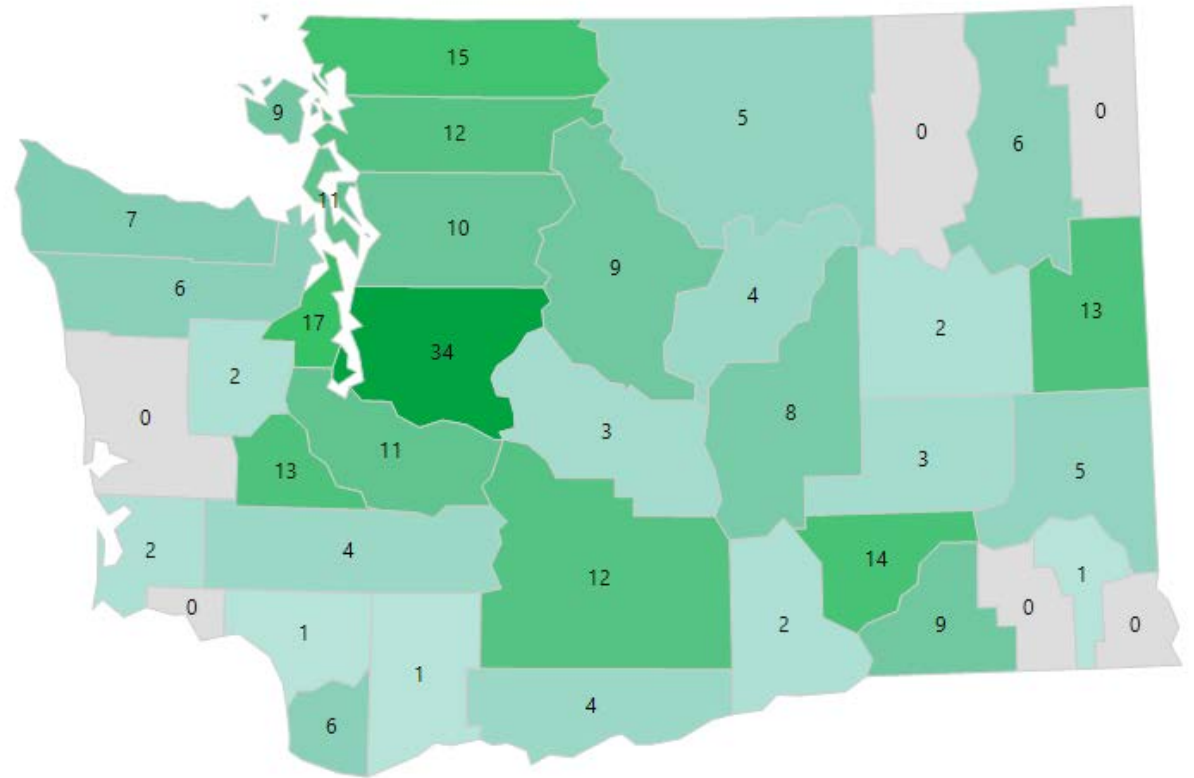
Purpose

- ▶ How have farms in WA been impacted by COVID-19?
- ▶ How can detailed information about farms' 2020 experience help to:
 - ▶ Inform recovery efforts
 - ▶ Build resilience to future challenges

General Survey & Farm Characteristics

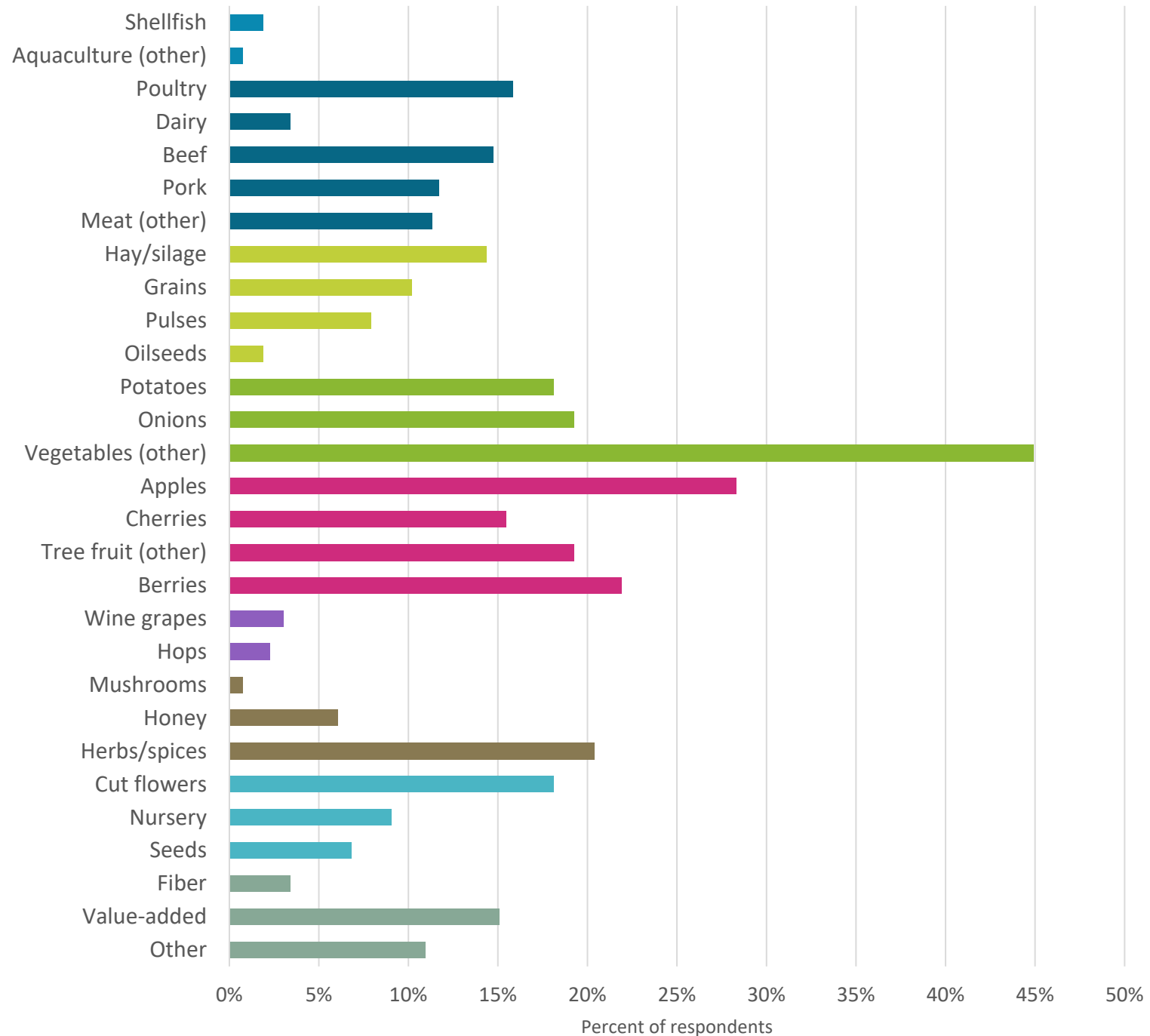
General Characteristics

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

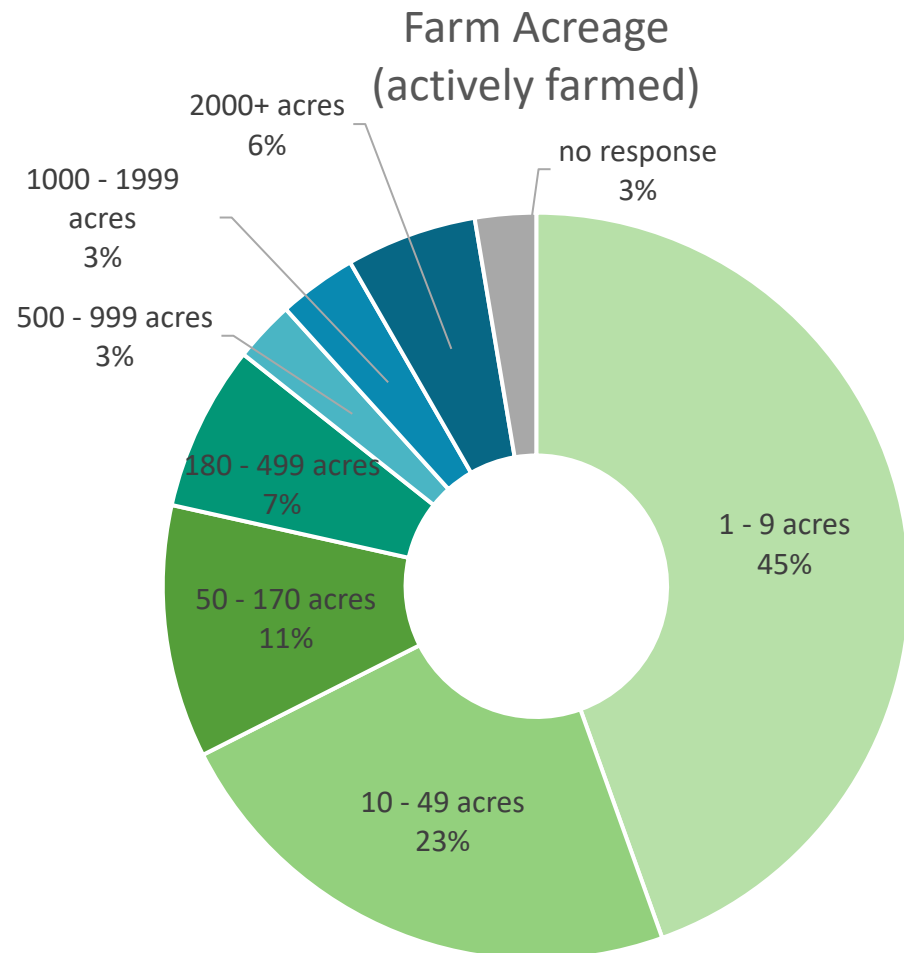


Farm Types

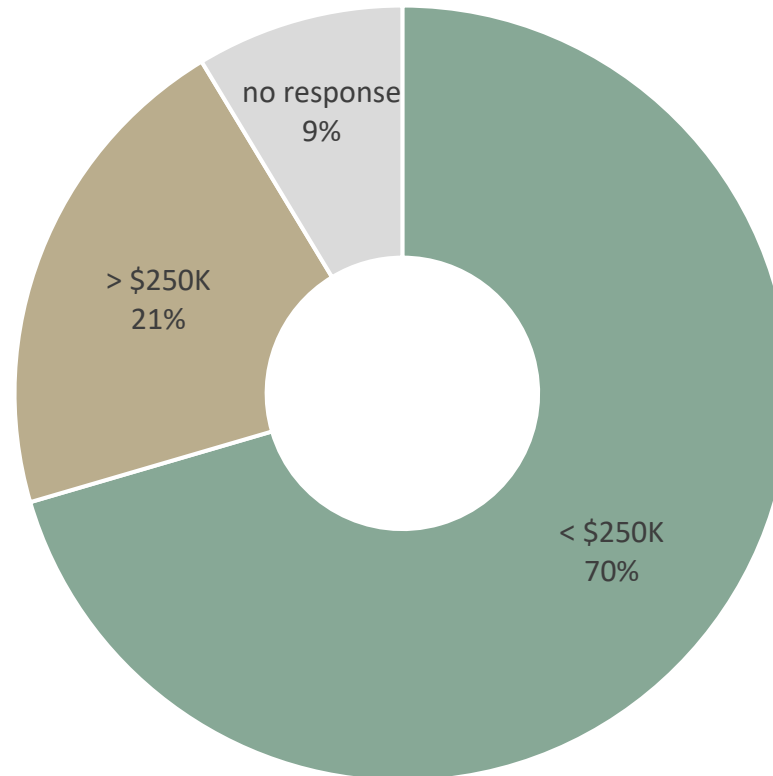
- ▶ Highest numbers of responses from vegetable, fruit, and meat/egg producers
- ▶ Over 75% of farms surveyed produced more than one category of product



Farm Types

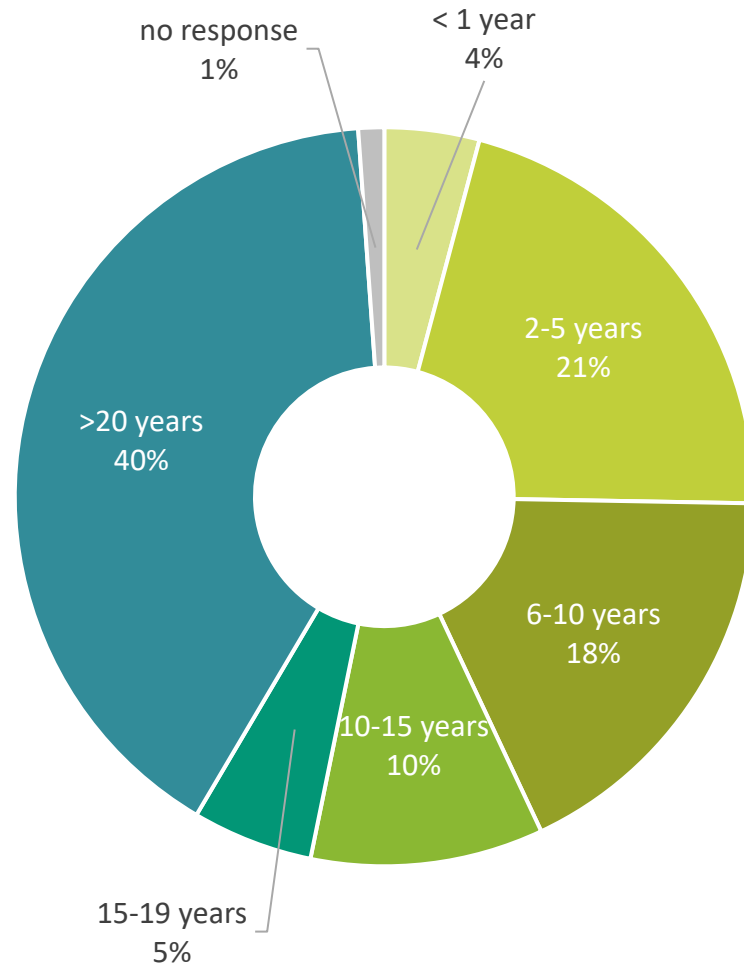


Gross Annual Revenue (2019)



- ▶ Majority smaller farms
- ▶ Some farms at all scales

Years in Operation

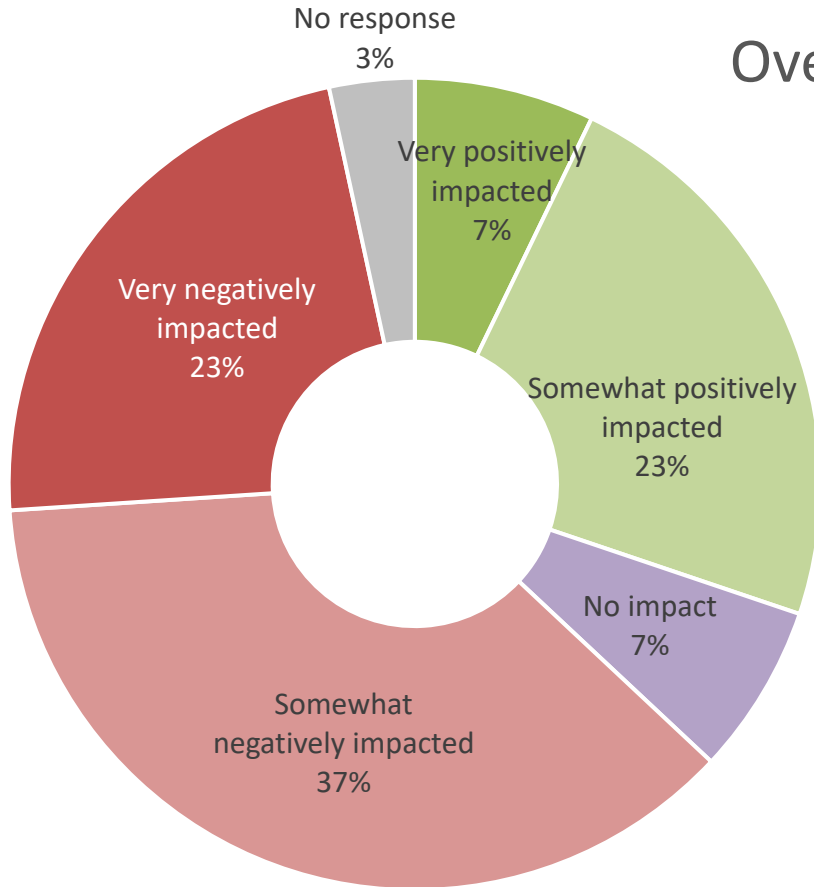


- ▶ Mix of beginning and experienced farmers
- ▶ 40% of respondents had been in operation >20 years
- ▶ *Small farm ≠ beginning farm*

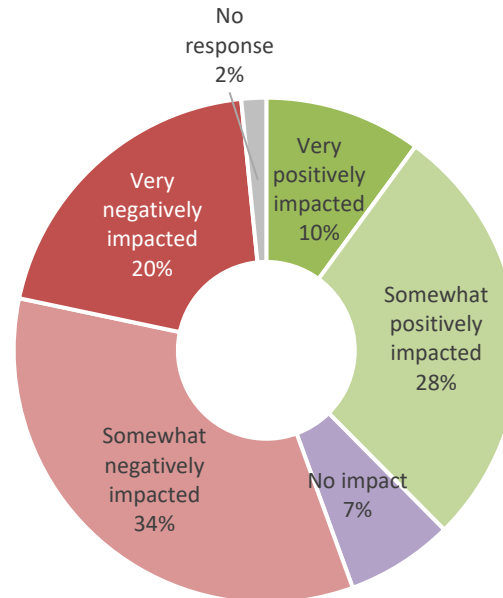
COVID-19 Impacts & Experiences

Overall Impact

Overall Impact of COVID-19 on Business

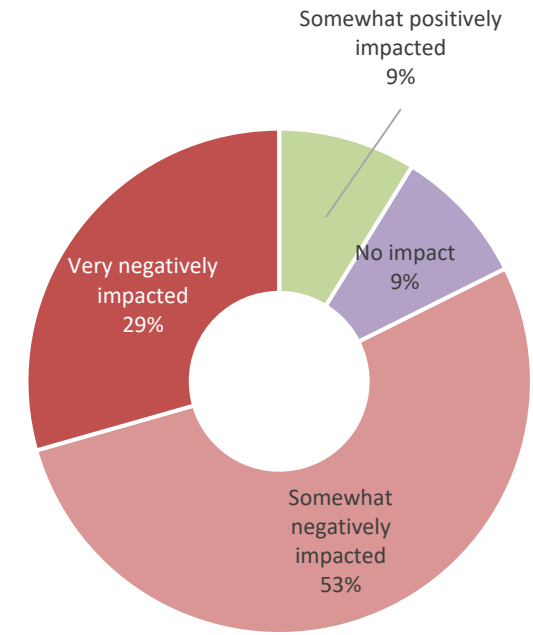


60% Negatively impacted
30% Positively impacted



>75% Local/Regional Marketing

54% Negatively impacted
38% Positively impacted

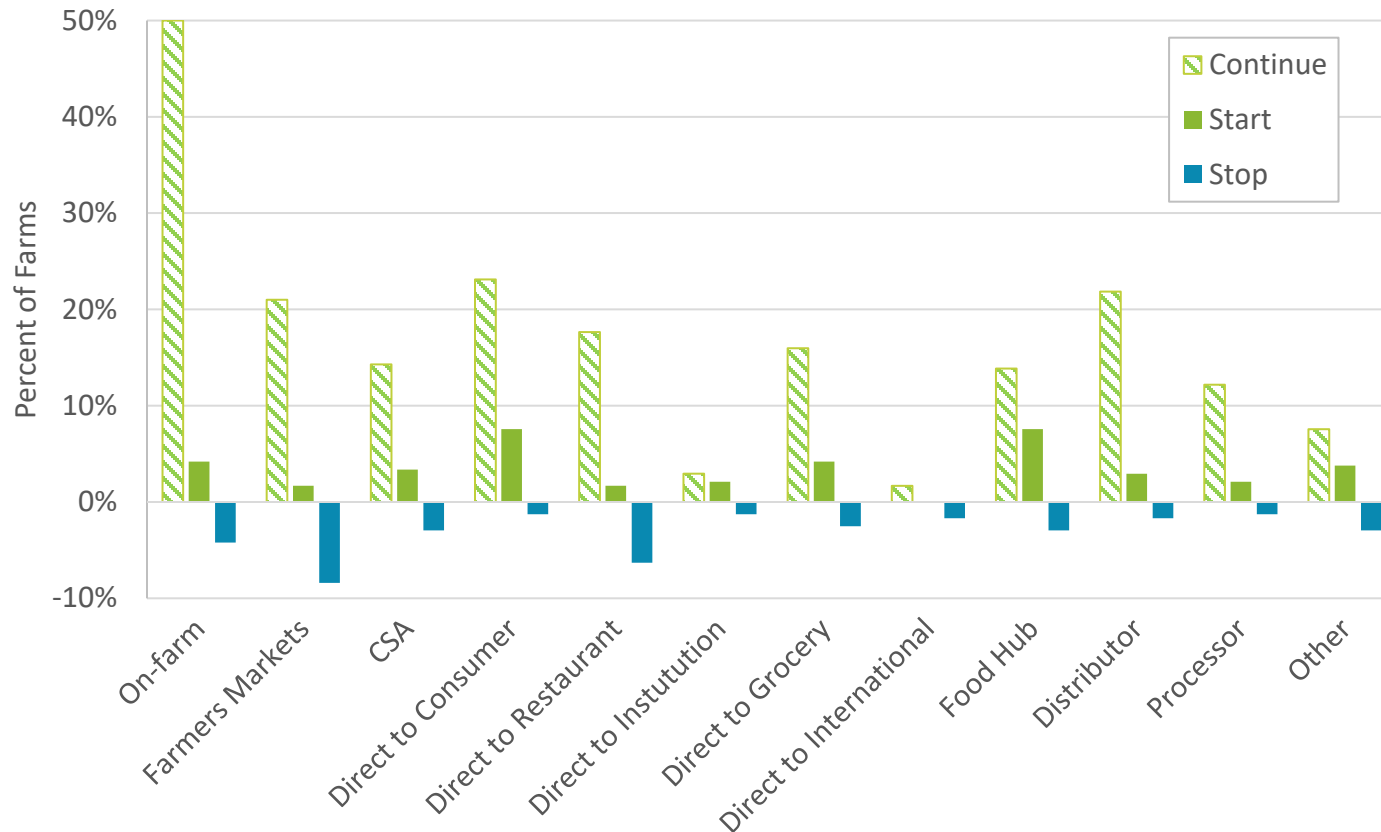


>75% Natnl/Internatnl Marketing

82% Negatively impacted
9% Positively impacted

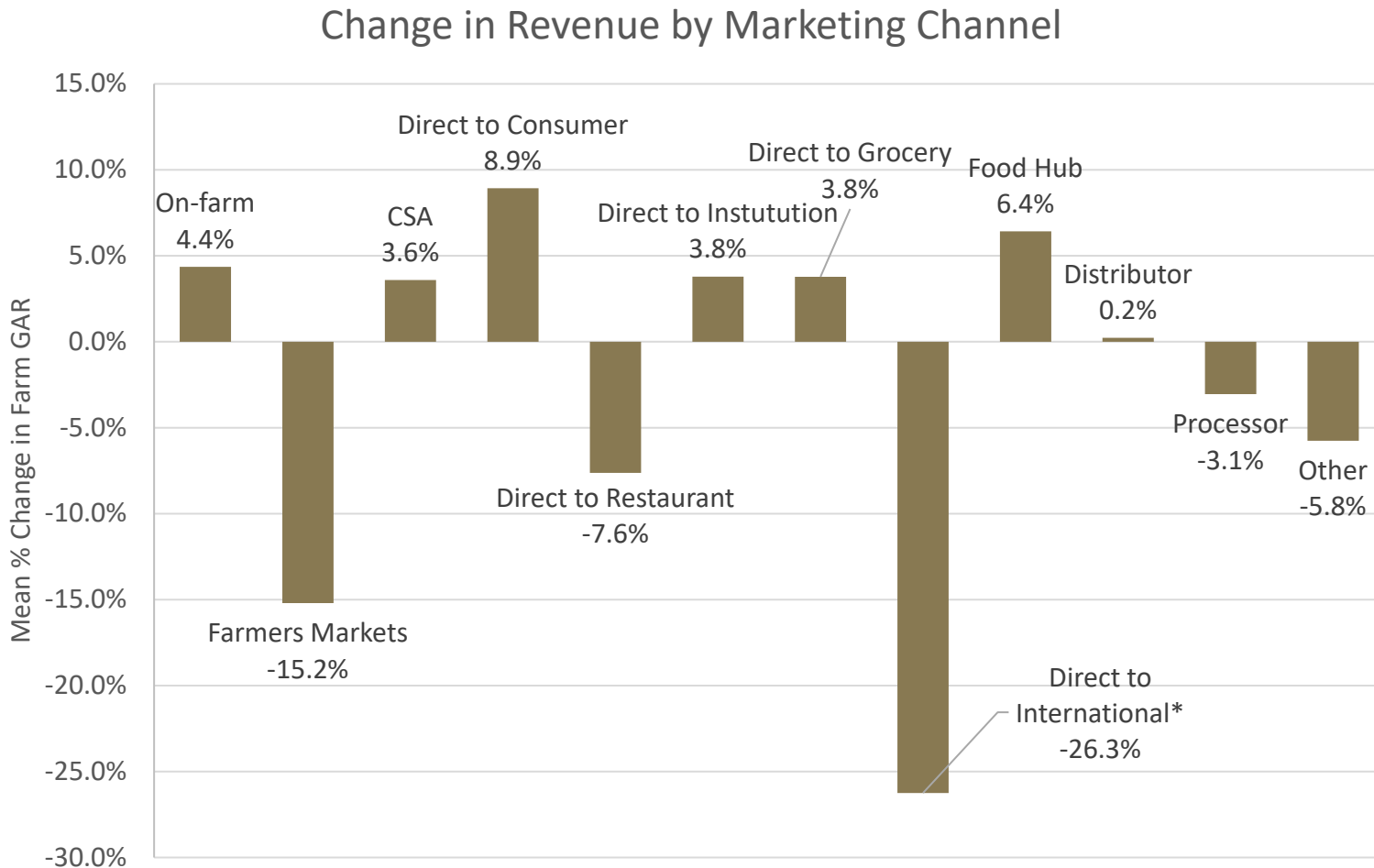
Trends in Sales Channels

Percent of Farms Continuing, Starting, or Stopping Sales Channels



- ▶ Channels **stopped** most frequently:
 - ▶ Farmers markets
 - ▶ Direct to restaurant
- ▶ Channels **started** most frequently:
 - ▶ Direct to consumer
 - ▶ Food hub
- ▶ Nearly 30% of farms **started** at least one new sales channel in 2020 compared to 2019

Trends in Sales Channels



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

“I stopped selling at farmers markets altogether”

“CSA and local farmers market sales tripled or quadrupled”

*Small sample size

Expansion of Farm Business Networks

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

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

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

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

“Food processing with local restaurants”

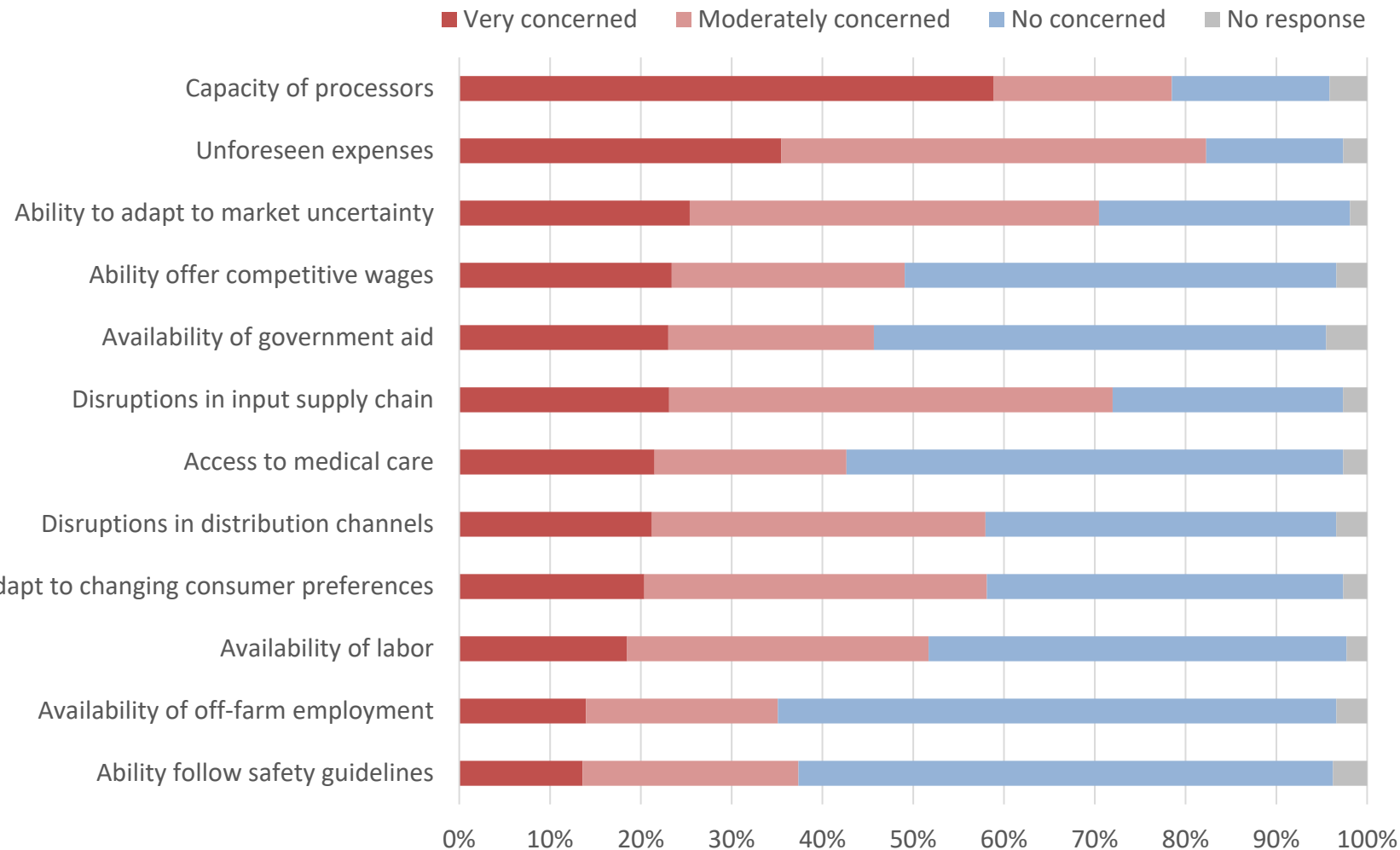
“Worked with [a] group of local farmers to create a cooperative food hub”

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

“I joined with another farmer running an online marketplace”

Looking to the Future

Concerns for 2021

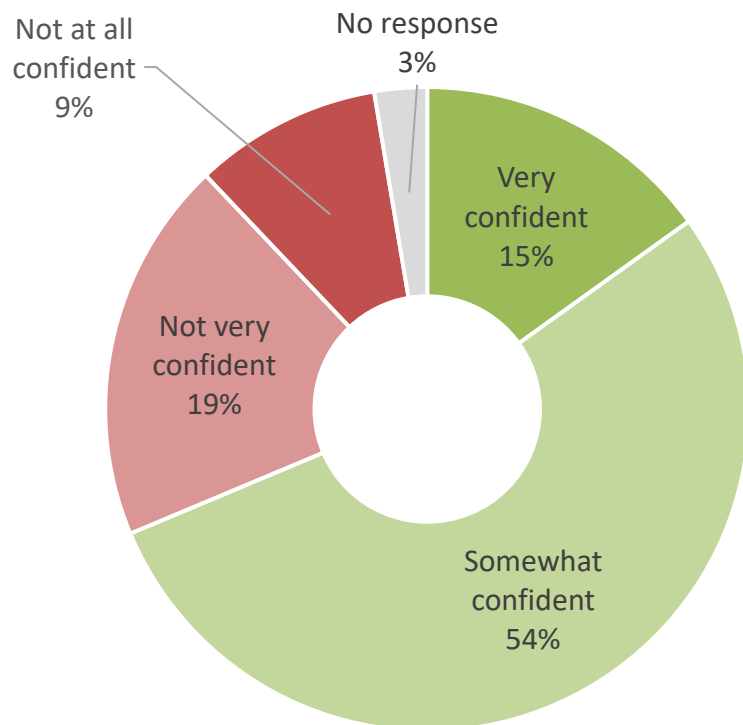


- Top concerns for 2021:
- ▶ Capacity of processors
 - ▶ Unforeseen expenses
 - ▶ Market uncertainty
 - ▶ Disruptions to input supply chain

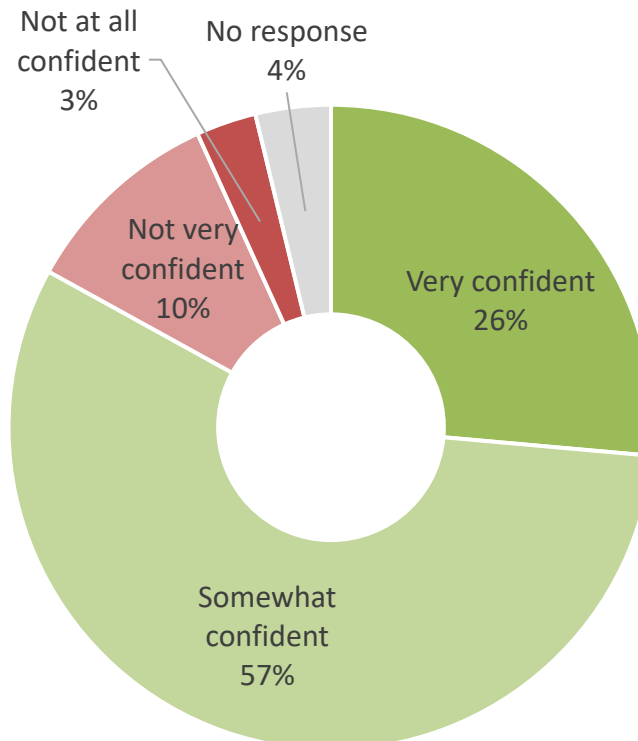
Preparedness to Adapt

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

Financial Capacity



Personal / Network / Human Capacity



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

“Stoicism helped the most”

More Coming Soon...

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