

The Status of Marin County Agriculture: A Profile of Current Practices and Needs



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THE STATUS OF MARIN COUNTY AGRICULTURE:

A Profile of Current Practices and Needs

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Executive Summary

This report provides a current profile of Marin County agriculture—the producers, their farms and ranches, their products and markets and plans for the future. The data in this report are the results of a four-page, 35-question survey mailed to 186 Marin County agricultural producers in July 2002. A total of 95 producers returned completed surveys for a response rate of 51%. The purpose of the survey was to identify and report current needs and issues facing these farmers and ranchers to the public, other producers and County decision makers. Survey results confirm many positive aspects of Marin County agriculture—from the variety of products being grown here, to the increasing interest in organic production. It also revealed the troubling fact that a majority of Marin agricultural producers either find their operations marginally profitable or unprofitable.

Respondents reported that:

- A majority of Marin County agricultural operations are family-owned
- The average age of producers was 54 years
- 27% percent have protected their ranches with agricultural conservation easements and another 19% are considering a conservation easement for their property
- Only 2% do not intend to keep farming
- 63% of agricultural operations were unprofitable or marginally profitable
- 44% rely on land leased from other owners
- 64% consider farming to be their principal occupation
- 78% own their own land
- 86% had between one and four family members involved in their operation
- 71% have a family member who is interested in continuing ranching or farming
- 60% are working on farm succession plans
- 90% have no plans to sell all or part of their property within the next five years
- 29% have added new productions or enterprises to their farm or ranch over the past five years
- 46% indicated that they farmed all or part of their operation organically
- 24% are making value-added products

Methodology

The survey form was developed by University of California staff with input from local agricultural producers. A small group of producers and other advisors reviewed a draft survey and provided input for the final version. A mailing list was compiled from four sources that included agricultural producers: the Marin County Assessor's office¹; the Marin Agricultural Land Trust (MALT), the Marin County Agricultural Commissioner's office, and University of California Cooperative Extension (UCCE) agricultural producer mailing lists. Duplicate entries

¹ Names and addresses from the Marin County Assessor included owners of all agriculturally zoned Assessor's parcels in Marin County. The MALT mailing list consisted of all owners of agriculturally zoned land where ownerships total 150 acres or greater and ranchers who do not own land. The Agricultural Commissioner's office list was composed of agricultural producers who receive the Crop Report annually. UCCE mailing lists were a compilation of agricultural industry mailing lists.

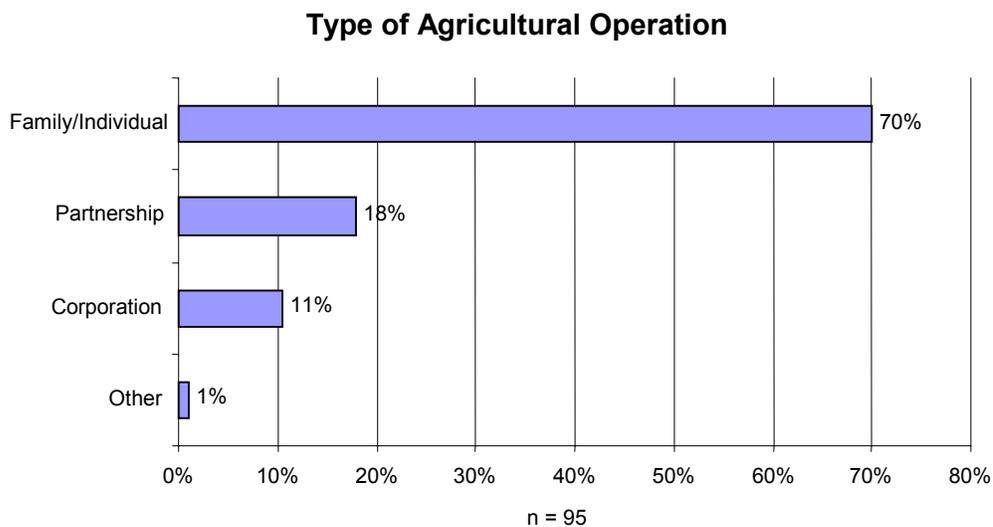
were eliminated and a total of 186 surveys was mailed to the combined list. Follow-up calls were made to each survey recipient encouraging their participation. A total of 95 producers returned completed surveys for a response of 51%.

Survey Results

The survey was divided into nine sections and included questions about the size and type of agricultural operations, leased land, farm succession, product diversification, value-added products, marketing outlets, interest in participating in a directory and further help we could provide. The results are reported in the order of the questions asked. The number of respondents varied for each question, with the total number for each question indicated as n=. Where replies are mutually exclusive, percentages may be slightly off due to rounding. Where replies are not mutually exclusive, percentages may total to more than 100%.

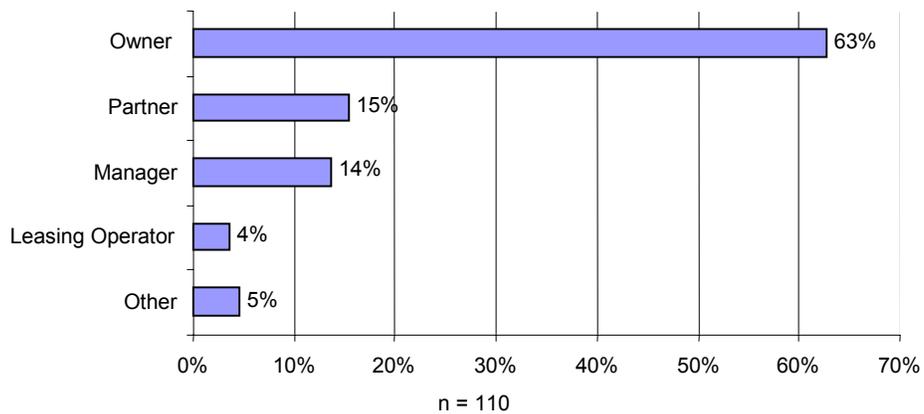
Section 1. Profile of Agricultural Producers

Agricultural land in Marin County is principally owned and operated by multi-generational families who clearly intend to keep and farm their land. This survey confirms the troubling fact that most (63%) Marin agricultural producers either find their operations marginally profitable or unprofitable. Despite this, a large majority of respondents plan to keep farming. However the advanced age of many of these producers (the average age is 54 and the median age is 52) is cause for concern about the long-term viability of Marin County agriculture.



Of the survey respondents, 70% indicated they were a family or individually owned operation. Eighteen percent were in a partnership, 11% were part of a corporation and 1% reported that their businesses did not fit these three categories.

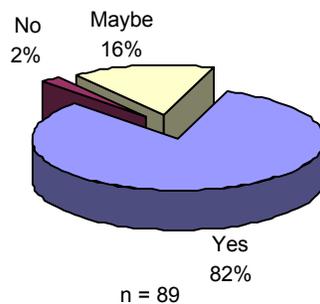
Business Role in Operation



When reporting on their role in their agricultural operation, 63% indicated that they were the owner, 15% were partners, 14% were managers, 4% were leasing operators, and 5% indicated that they were one of the following: president (2), proprietor (1), laborer (1), part-time owner/manager (1).

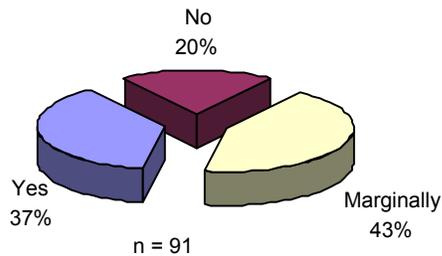
The average age of the respondents was 54, with an average of 33 years of farming experience. Seventy-three percent of respondents were men and 27% were women.

Do you plan to keep farming?



When asked whether they intended to keep farming, 82% said yes, 16% maybe and 2% said no.

Do you consider your overall operation profitable?



When asked whether they considered their overall operation profitable, 37% said yes, 20% reported unprofitable operations, and 43% said their operations were marginally profitable.

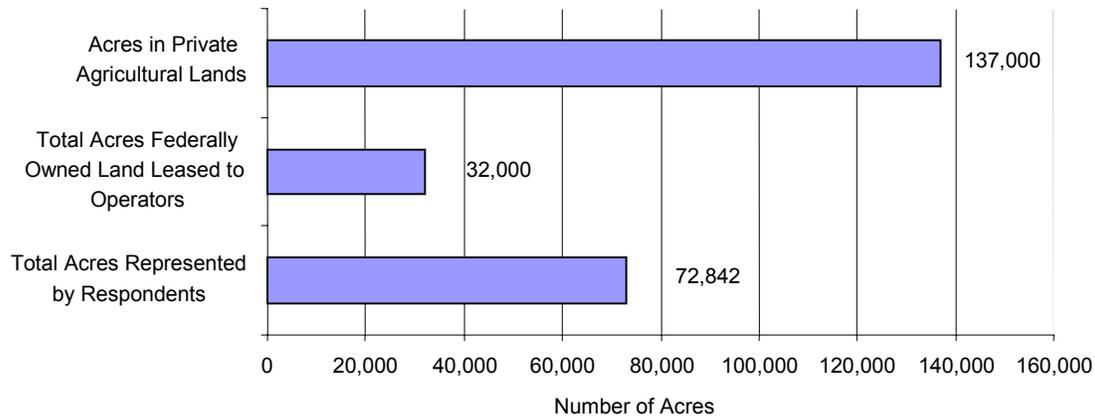
Section 2. Farm or Ranch Operation Description

Marin County's agricultural land base includes approximately 137,000 acres of privately owned agriculturally zoned land and 32,000 acres of federally-owned land that is leased to agricultural operators. Of these 169,000 acres, 149,663 acres were in farms as of 1997² (USDA, National Agricultural Statistics Service). Respondents' farms and ranches represent 43% of this total acreage. The importance of leased land to many agricultural producers was illustrated by the fact that 42% of the land in respondents' agricultural operations is leased. Most producers consider agriculture to be their principal occupation, but almost half work off the farm to supplement their income. Most of their off-farm work is in an agriculturally related business such as dairy milling, manure hauling and spreading, and milk hauling. Marin County agriculture is still largely based on animal agriculture although some farmers and ranchers have diversified into other types of non-animal ventures in recent years.

² The USDA 1997 Survey of Agriculture lists a total of 276 farms on 149,663 acres in Marin County. One hundred and seventy-one of these farms produced \$10,000 or more per year on 133,444 acres.

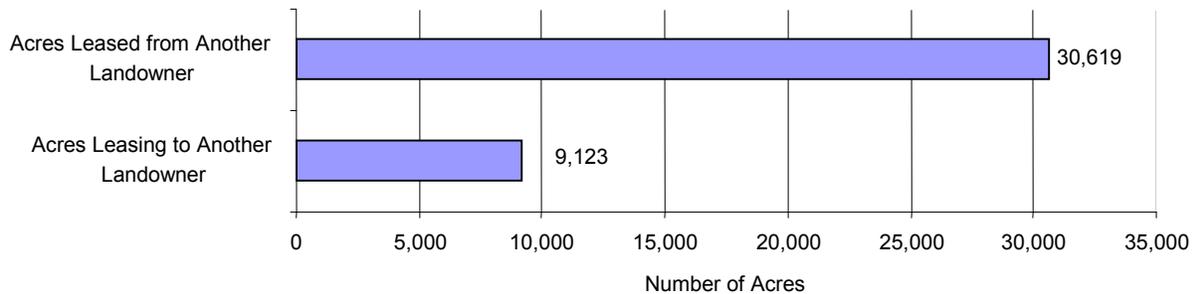
The following graph illustrates agricultural land acreages by ownership and includes the acreage represented by respondents.

Agricultural Land Acreage by Ownership and Respondent Rate



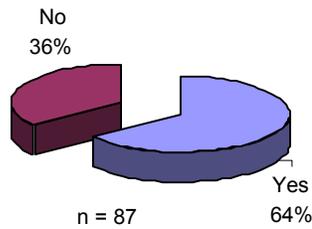
Survey respondents reported the average size of their farms to be 777 acres—50 acres less than the 827-acre average size listed in the 1997 Agricultural Census for Marin County. The smallest farm operated by survey respondents was 1.5 acres, intensively farmed with a native plant nursery, and the largest operation reported was 4,800 acres of grazed land with replacement heifers and sheep.

Are you leasing from or to another landowner?



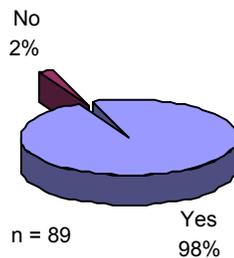
Survey respondents reported that leased land is an important part of their operations. Of the 72,842 acres farmed by respondents, 42% (30,619 acres) is leased from other owners (n=87). Respondents also indicated that they lease over 9,000 acres out to other operators (n=89). In some cases the lessee is a relative.

Is farming your principal occupation?



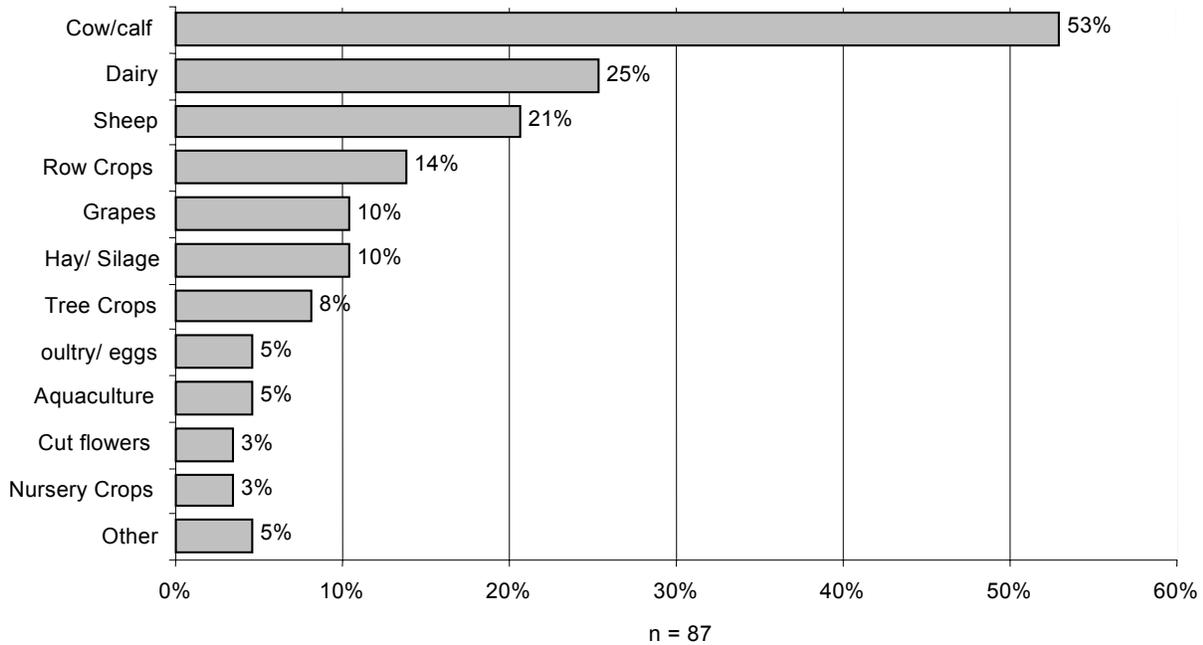
Sixty-four percent of the farmers and ranchers surveyed consider farming or ranching to be their principal occupation while 36% do not.

Is your land currently in an active agricultural operation?



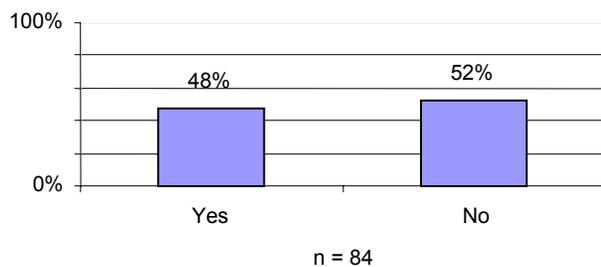
Ninety-eight percent of those reporting said that their land is part of an active agricultural operation while only 2% representing 1,693 acres of agriculturally zoned land indicated that they were not actively engaged in farming.

Type of Active Agricultural Operation

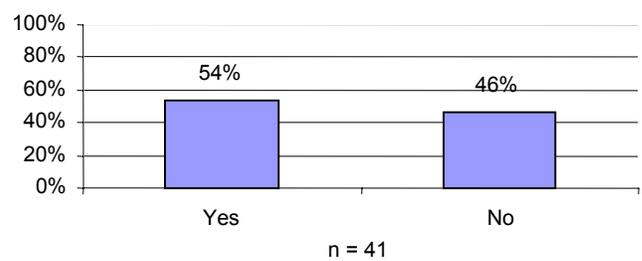


Those surveyed were asked to characterize their agricultural operations and products by the general categories listed above. Some of the operations included in these general categories produce specialized products. For example, dairy included a cheese-making operation and other value-added dairy products such as yogurt and ice cream. Row crops included organic strawberries, cane berries, and vegetables. Tree crops included olive trees, apples, citrus, and others. Aquaculture included mussels, abalone, and oysters. Nursery crops included nurseries growing and /or propagating plants and seed. Small numbers of stockers and beef-breeding stock were included with cow/calf. Replacement heifers were included with dairy. Other types of products mentioned by respondents included goats, honeybees, rabbits, and horse breeding.³

Do you work off farm?



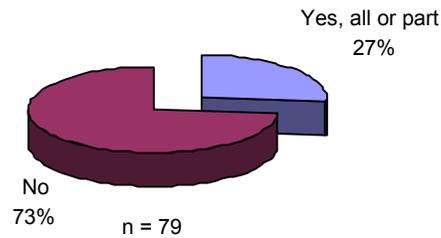
If yes, is off-farm work agriculture related?



Almost half or 48% responded that they work off the farm and over half or 54% of those work in some type of agriculturally related occupation.

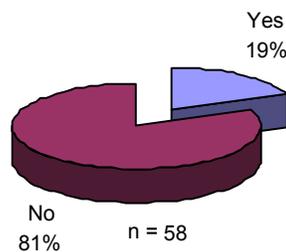
³ Horse breeding is not included in the definition of agriculture in Marin County as described in the Countywide Plan.

Do you have a conservation easement on your property?



When asked whether they had a conservation easement on their property 27% indicated that there is a conservation easement on all or part of their land.

Are you considering a conservation easement?

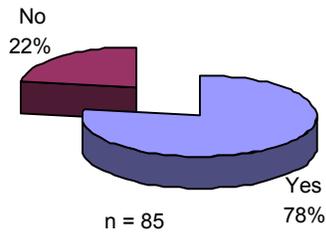


When asked this follow-up question, 19% said yes.

Section 3. Farm Succession

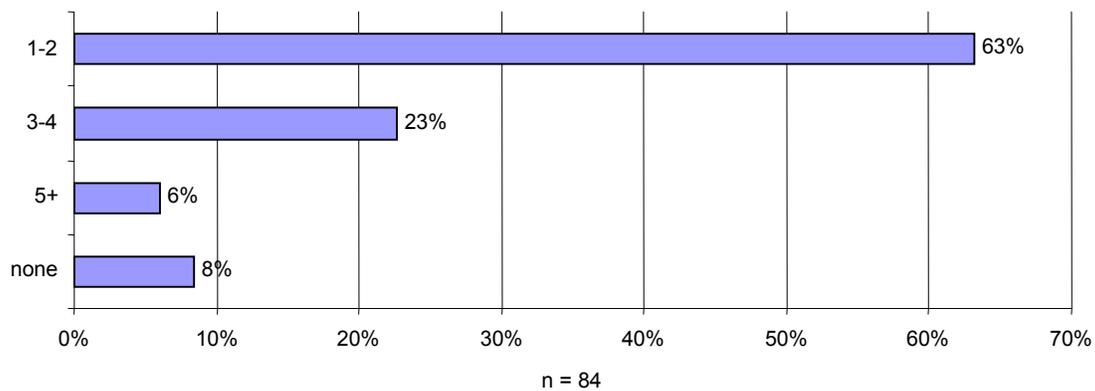
Marin farmers and ranchers have a close relationship with the land they farm as evidenced by the high numbers who have lived and farmed on their land for multiple generations. Most of Marin's farmers and ranchers plan to continue their operations into the foreseeable future. However, farm succession is a topic of concern throughout the nation as the average age of farmers has been steadily increasing. The number of California farmers under the age of 35 declined 51% between 1987 and 1997 according to a USDA study (Economic Research Service 2000). Low profits, high land prices, and unstable markets are among the factors that discourage young people from following in the footsteps of their farming families or starting new agricultural enterprises. Although conservation easements and restrictive development regulations help to protect much of Marin's farmland from development, the question of who will succeed today's farmers and ranchers looms large.

Do you own your own farm or ranch?



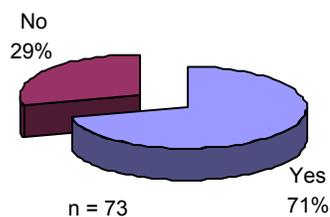
Seventy-eight percent indicated that they owned their farm or ranch and 22% did not. For those who owned their operations, the length of ownership ranged from three years to 168 years and from one generation to five. Average length of ownership was 53 years.

How many family members are currently involved in the operation?



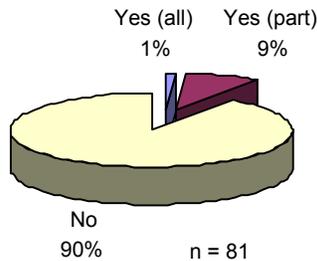
By far, the majority of those responding (86%) had between one and four family members involved in the operation. Only 8% indicated that no other family members were involved and 6% had five or more family members involved.

Are family members interested in continuing farming on the property?



Seventy-one percent said that family members are interested in continuing farming on the property, and 29% said that no other family members were interested. Sixty percent said that they were working on a farm succession plan and forty percent were not. Of those who had not done succession planning, 48% were interested in receiving more information on this subject.

Do you have plans to sell all or part of your farm/ranch in the next five years?

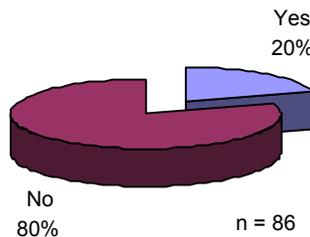


A resounding 90% indicated that they have no plans to sell their land in the next five years. Nine percent indicated they were planning to sell part of it and only one percent intended to sell the entire property.

Section 4. Land Leases

A majority of Marin County farmers and ranchers own at least some of the land they farm, but many rely on leased land for all or part of their operation. Leases between family members are common. Leased land is especially important to range livestock operations such as beef and sheep ranching that rely primarily on harvesting natural forage from extensive acreages. While a significant amount of agricultural land is leased out to farmers and ranchers, some newer entry farmers who do not own land in Marin expressed difficulty in being able to afford to start up an operation.

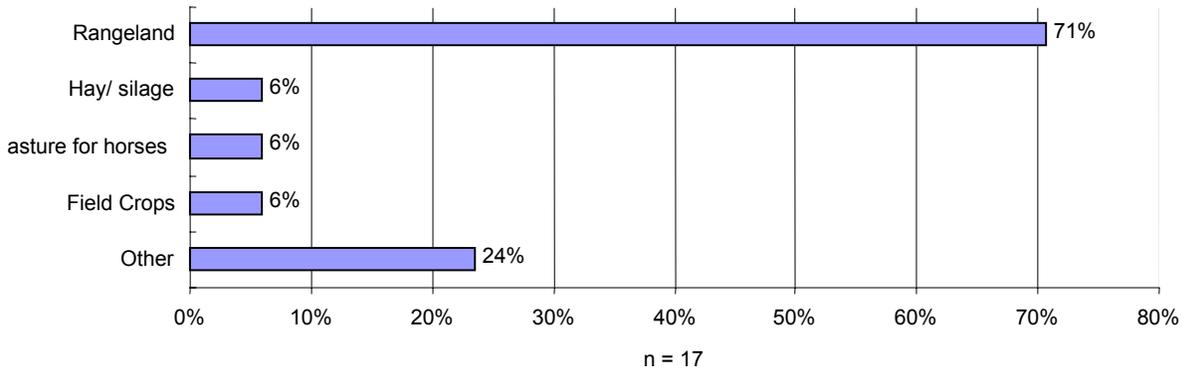
Are you a landowner currently leasing land to another operator for agricultural production?



Twenty percent indicated that they leased land out to another producer, while 80% did not. Of those leasing to another producer, leased acreages varied.

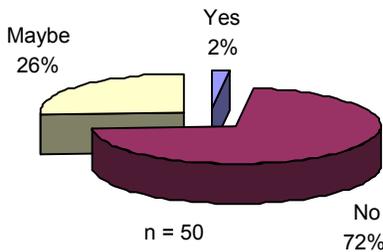
Only 13% leased less than 60 acres, while 38% leased between 60 and 240 acres, and the balance of 50% leased more than 360 acres to another producer.

What do you lease land for?



Of the 17 respondents who indicated that they leased land, 71% used their land for rangeland grazing of cattle and/or sheep. Six percent each leased for horse pasture, hay or silage, and field crops, and 24% indicated they leased for other uses including cut flowers, dairy, and row crops.

Are you interested in leasing to a farmer or rancher?



Of those who were not currently leasing land to another farmer or rancher, the majority or 72% indicated they were not interested, 2% said yes, and 26% indicated that they might be.

Section 5. Farm and Ranch Diversification

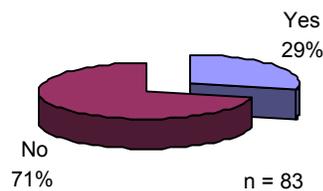
Local producers and support agencies have mounted a concerted effort over the past several years to encourage product diversification as a means to increase overall farm and ranch profitability. Diversification of farm and ranch products and services provides opportunities for producers to increase income, spread “risk” between varied crops or enterprises and to take advantage of special attributes of their operation. Questions about interest in, and the extent of, organic operations and use of compost were included in this section.

Producer interest in transitioning to organic production has been on the rise. Twenty-two organic producers reported that they farmed 1,928 acres organically, exceeding the 1,469.25 acres certified by the Marin County Agricultural Commissioner’s office as of November 2002 by 458.75 acres and an additional 16 said that they used organic practices on part of their operation. This may indicate some producers’ belief that they are using organic practices even if they are not “officially” organic. Aquaculture producers that consider their shellfish growing leases in

Tomales Bay organic account for 225 of these additional “uncertified acres” as shellfish growing areas cannot currently be certified organic. Since there are no certified organic beef operations in Marin County, it’s assumed that the cow-calf producers who said they farm organically felt they were either farming with organic practices but were not yet certified, or that they were referring to another crop or product that was certified. Specific comments indicated that some producers were growing natural beef but were still using wormers, antibiotics and delousers, while others stated they were in transition to organic and hoping to certify their operations in the future.

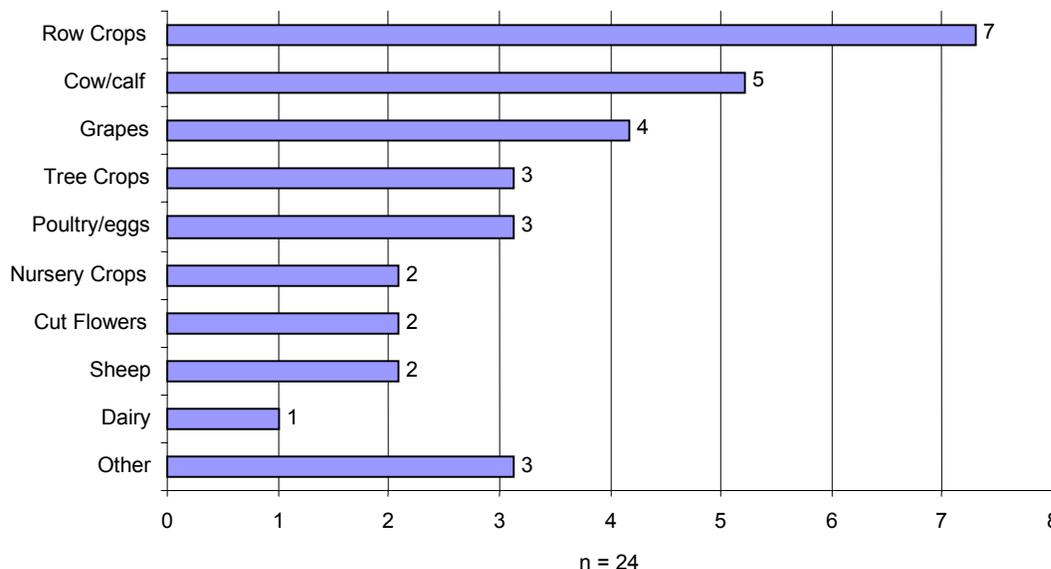
Several Marin beef producers have been meeting since May in an effort to standardize and organize a Marin grass-fed beef marketing effort. Some producers in the group would like to certify their operations so they could sell their beef as certified organic, but there are several factors that must be overcome.

Have you added new products or agricultural enterprises in the past 5 years?



Twenty-nine percent of producers responded that they had added a new product or enterprise to their operation and 71% had not. When asked what products and enterprises they had added, they indicated the following:

If yes, what types?



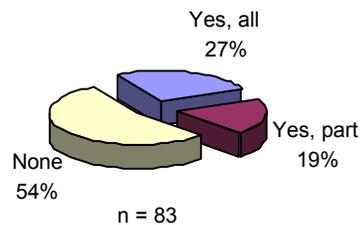
Other included goats, honey, and horse breeding.

What information do you need to diversify into other areas?

Their responses fell into the following general categories:

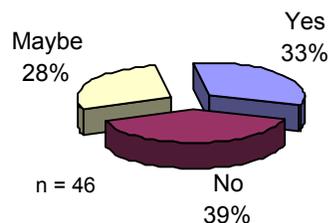
- Farm Advisor assistance with field varietal trials (3 requests)
- Obtaining water inexpensively (1 request)
- Information on raising organic vegetables and eggs (6 requests)
- Help with county permitting and regulations (4 requests)
- Product and marketing information (6 requests)
- Agritourism (2 requests)
- General ideas on product diversification (6 requests)

Do you farm all or part of your operation organically?



Of 83 respondents, 27% (22) said that they farmed all of their operation organically⁴ and 19% (17) farmed part of their operation organically. The remaining 54% (44) do not use organic farming methods.

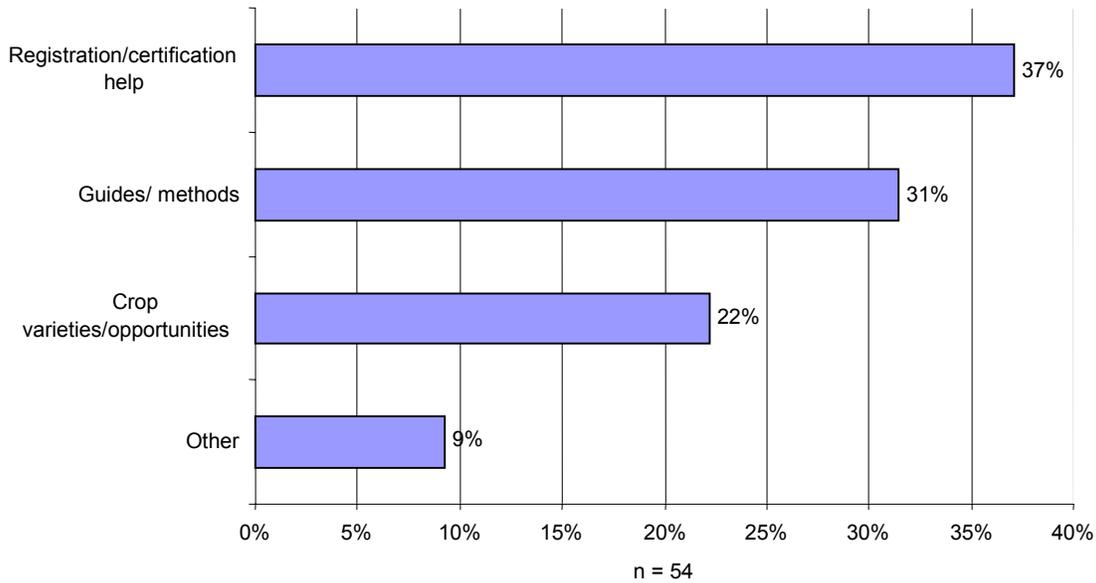
Would you consider transitioning any of your operations to organic?



When asked about their interest in transitioning their operations to organic, 33% said that they were interested and 28% said maybe. Thirty-nine percent said that they were not interested.

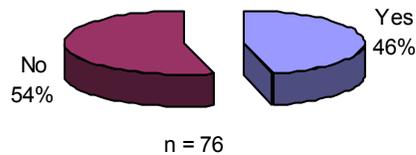
⁴ Registration of organic growers by counties is mandatory in California. Organic certification is also required in order to sell products labeled organic unless the producer grosses \$5,000 or less per year. Organic certification verifies that organic products are grown in accordance with the National Organic Program.

If yes, what type of assistance will you need to transition to organic?



Of those interested in transitioning to organic, respondents asked for: assistance with certification (37%), help with organic methods (31%), more information on various crop or variety opportunities (22%), and 9% asked for assistance with animal parasiticides, antibiotics, and financing.

Do you use compost in your production practices?



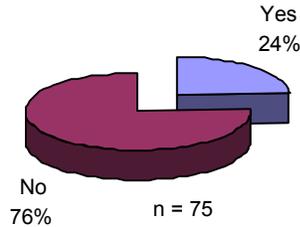
Almost half, or 46%, responded that they used compost while 54% said that they don't. Of those who use compost, 66% made their own while 37% purchased it.

When asked whether they were interested in making and utilizing compost on their farms (n=70), 39% said they were interested while 61% were not.

Section 6. Value-added Products

Value-added was defined in the survey as the addition of value to a raw farm product through processing, blending or otherwise adding economic worth. Examples of value-added products include organics, farmstead cheeses, and grass-fed beef.

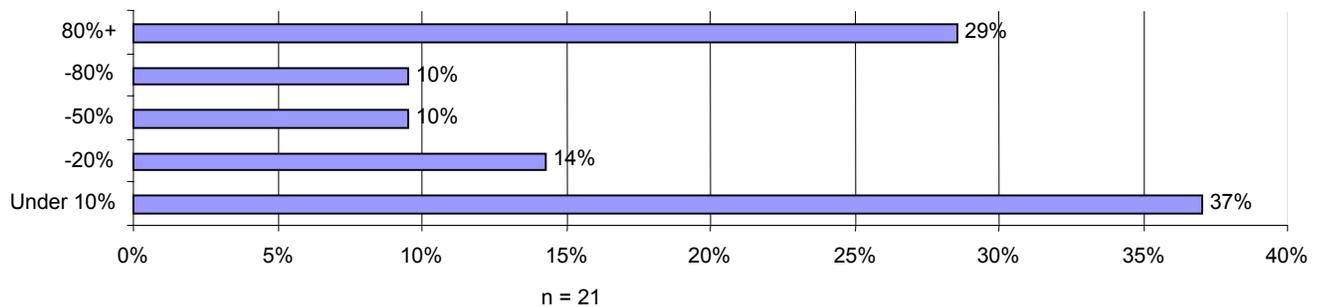
Are you making value-added products?



Twenty-four percent of respondents were currently doing this and 76% were not. The following types of value-added products are being produced in Marin County:

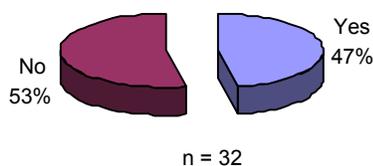
- Wine
- Olive oil
- Grass-fed beef
- Range poultry and eggs
- Natural wool
- Dried herbs and garlic braids
- Herbal lotions
- Organic milk, cheese, yogurt, butter and smoothies
- Broiler chickens
- Mesclun mixes
- Variety of farmstead cheeses
- Oyster bars

What percent of your gross sales come from value-added products?



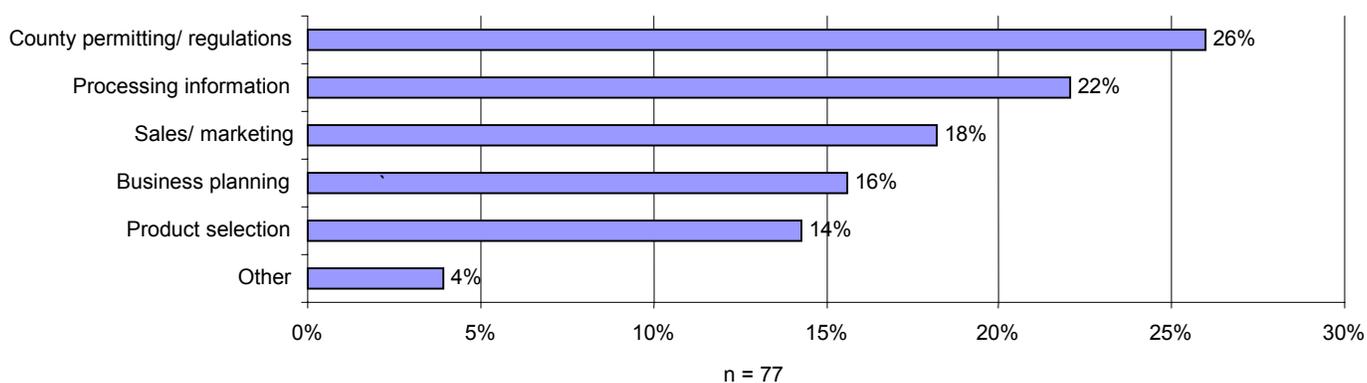
Of those who indicated that they did make some type of value-added product(s), 37% said that less than 10% of their gross sales came from this type of product while 29% said that it accounted for over 80% of their gross sales. The balance of the respondents fell somewhere in between.

Are you interested in adding a value-added component to your products?



Respondents were almost evenly divided in their interest in value-added products with 47% stating they were interested and 53% saying they were not. Those that were interested specified the following types of products: wine, natural or organic beef, pickles, garlic, and jams. Others stated that they needed more information and ideas on what to make.

What information do you need to add a value-added product to your farm plan?



For those interested in making a value-added product, obtaining more information about county regulations and permitting rated highest of their needs (26%), followed by processing information at 22%, sales and marketing information at 18%, business planning at 16% and product selection at 14%.

Section 7. Selling and Marketing Your Agricultural Products

Marin producers were asked about their sales outlets and geographic scope of their product markets. Distribution of farm products is dependent on many factors including how perishable they are, how specialized they are, transportation costs, and proximity to processing and finishing facilities. Generally, highly perishable, bulky (such as hay and silage), and fairly common products are sold closer to home while those that are less perishable, easier to transport

or more specialized find their way farther from their farm of origin. For ease of understanding, the responses are broken out by crop or product type.

While 73% of the dairy producers responding indicated who they sold their milk to, it was difficult to determine in most cases where the milk or dairy product was distributed in any detail. Nonetheless, the Bay Area continues to be an important market for Clover, Straus, Safeway, California Dairies Inc., and Dairy Farmers of America. For example, Clover, a Sonoma County-based dairy company that buys milk from Marin County dairies is taking advantage of its North Coast Excellence program by touting the quality of Marin and Sonoma milk and selling to Whole Foods stores throughout California. Dairy operators that sell to Hilmar, a large cheese company in California's Central Valley, see all of their product leave the county for widespread distribution. Straus Family Creamery, which processes its own milk and other dairy products distributes its highly specialized organic products throughout the nation although their primary market is Northern California and western states. Two other Marin cheese-making companies—Robert Giacomini Dairy, which makes Point Reyes Farmstead Blue cheese, and Cowgirl Creamery, who buys their milk from Straus, sell cheeses throughout the nation.

Of the nine wine grape growers that responded, some sell wine grapes and produce their own wine, some purchase grapes to make wine locally, and others sell their grapes by contract or on the open market. Marin County wine grapes and wines are sold within Marin and the Bay Area.

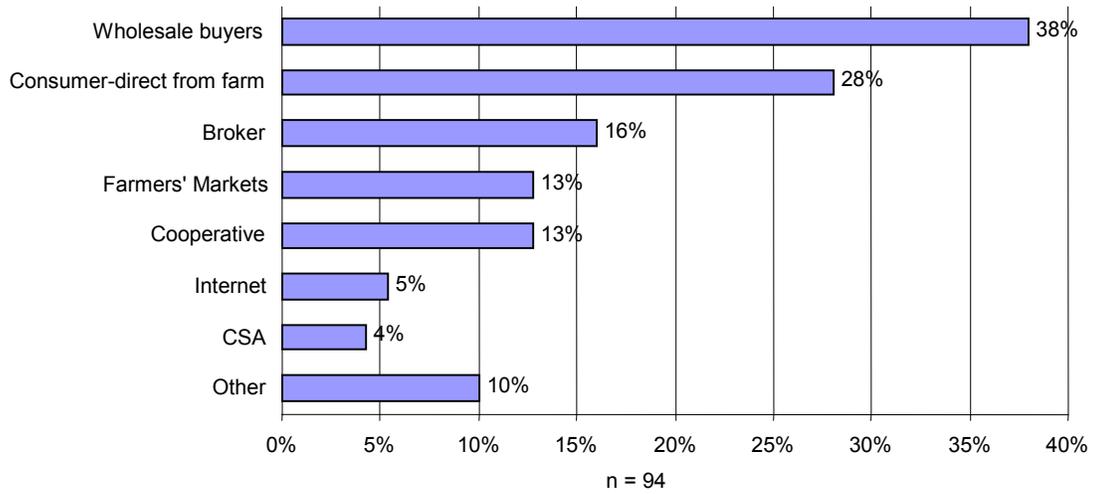
Of the 64 respondents that raise beef, only 11 of the 64 respondents have their primary market within Marin or the Bay Area. This is due to the fact that most beef cattle are sold off the ranch before they reach slaughter weight and moved to large finishing facilities in the midwest where corn and other cattle feeds are plentiful. Feeding, slaughtering, butchering and distribution are handled by a few large companies. A small but growing number of Marin beef ranchers are growing their beef to slaughter weight on pasture and selling directly to consumers, bypassing large feedlots. They are also empathizing the health aspects of local "grass-fed" beef.

Hay and silage grown in Marin is either used on farm or sold within a short distance of its origin due to the high transportation costs for a fairly low-value, bulky product.

Most growers of row and tree crops and cut flowers and nursery crops sold their highly perishable products in Marin and the Bay Area (82%) while the remaining 18% had a market that includes other parts of California. Marin County poultry and eggs, which are also very perishable, also found their primary markets within Marin and the Bay Area.

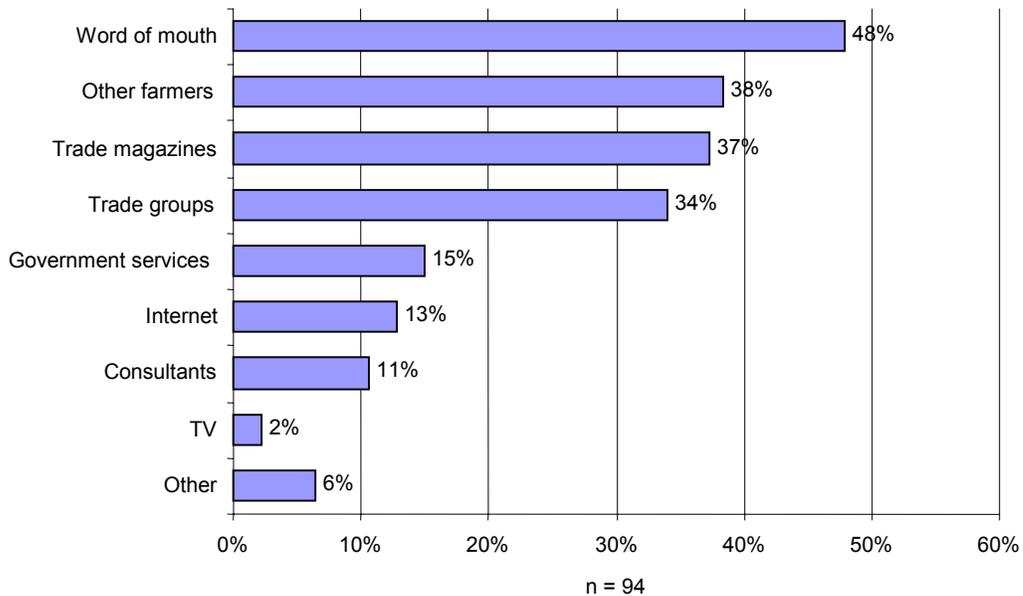
Of the four aquaculturists that responded to the survey, only one had a market exclusively in Marin while two others sold in the Bay Area including Marin. One grower had a substantial California market and one sold a small amount nationally and via the internet.

What are your selling outlets?



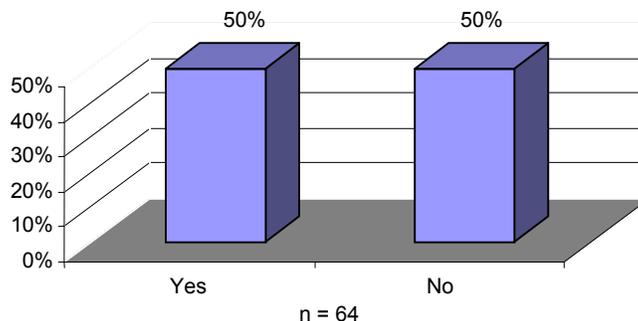
Thirty-eight percent had wholesale buyers while 28% percent sold directly from the farm, 16% sold via a broker, 13% at a farmers market, 13% through a cooperative, 5% via the internet and 10% from other outlets including auctions (5), restaurants (3), and catalogs (1).

How do you get information about selling, marketing trends and opportunities?



Nearly half (48%) of respondents get selling and marketing information via word of mouth, 38% from other farmers, 37% from trade magazines, 34% from trade groups, 15% from government services, 13% from the internet, 11% from consultants, 2% from television, and 6% from other sources

Could you use help with your marketing or selling program?

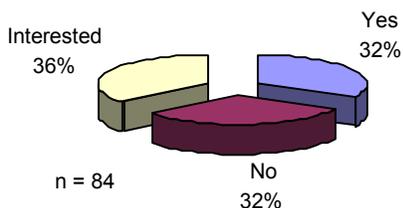


Producers were equally divided over their desire for help with half wanting assistance and half not.

Section 8. Inclusion in Marin County Producer's Directory

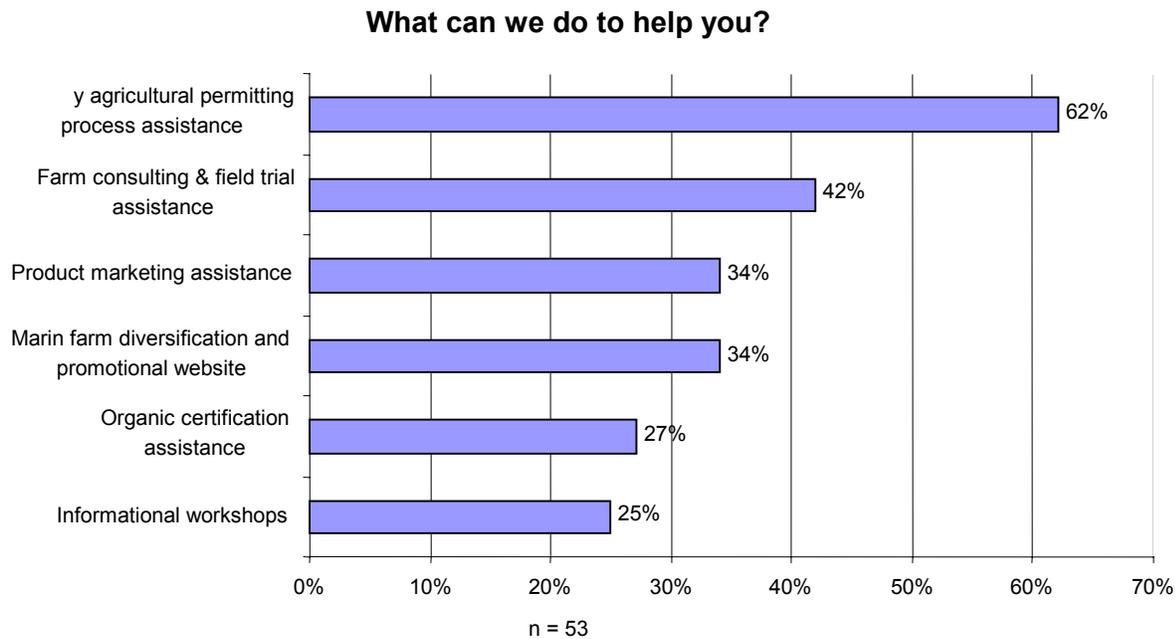
Producers were asked about their interest in participating in a Marin County agricultural producer's directory that will feature local farm and ranch products.

Would you like to be included in the Marin agricultural producer's directory?



A total of 68% said that they may be interested in participating while 32% indicated they were not interested.

Section 9. What Can We Do to Help You?



When asked what UCCE staff and others can do to help agricultural producers, assistance with the county permitting process ranked highest with 62% of respondents indicating a need for help in this area. Four respondents commented that it was difficult if not impossible to obtain permits, and they are too costly. Another person commented that they needed consistent help to get them through the permitting process. Farm consulting and field trial assistance was ranked as the second greatest need (42%), while a farm diversification and promotional website tied with product marketing assistance for third place. Assistance with organic certification and informational workshops ranked the lowest.

Responses from participating producers confirm the current and future direction of several new government initiatives. Staff in the Marin Agricultural Commissioner's office have certified 24 Marin organic producers as of November 2002. The UCCE office received a three-year grant from the Clarence E. Heller Foundation to provide farm consulting and field trial support through the newly created staff position—Sustainable Agriculture Coordinator for Marin. The County of Marin is also providing financial support for this position.

The Marin Community Foundation recently provided funds to develop a producer's directory and set up a marketing website. Work will begin on this project in spring 2003. In 2001, Marin Supervisor Steve Kinsey, developed a Near Term Agricultural Support Plan that included an Agricultural Ombudsman position. The position would work with Marin agricultural producers to help them navigate through the county permitting process. Funding has not yet been appropriated for this position.

Conclusion

Marin County's farms and ranches are strongly rooted in family. Most are family-owned, with substantial family involvement. A large majority of survey respondents have at least one family member who is interested in continuing the operation. A majority of operators are working on farm succession plans and only two percent of respondents said that they do not plan to continue farming or ranching. Over one-quarter have protected their property from non-agricultural development with agricultural conservation easements. Leased land is also an essential component of Marin's agricultural land base, and many respondents depend on land leases to run their operations.

None of this is surprising given that Marin County's agricultural community includes many well-established families who have been in the area for multiple generations. The fact that there is so much dedication and determination to continue the farming tradition here is remarkable given that a majority of respondents considered their operations to be marginally profitable or not profitable.

Nearly one-third of respondents have added new products or enterprises to their operations within the past five years, presumably to increase their bottom line. Some operators have added value to their products through organic certification. It is interesting and encouraging to note that nearly half of respondents perceive that they are farming all or part of their land smaller. These operators are poised to become certified and could add value to their products in this way. Surprisingly, assistance with organic certification rated well below other types of desired assistance.

Clearly, Marin County has a solid agricultural land base and committed agricultural operators. Supporting farmers and ranchers' efforts to diversify and add value to their products and operations, and ensuring that agricultural land is not lost to residential and other non-agricultural uses are essential to the continuation of Marin's agricultural tradition.

References

National Agricultural Statistics Service, USDA. 1997. 1997 Census of Agriculture, California State and County Data. Volume 1, Geographic Area Series Part 5, 451 pp.

Economic Research Service, USDA. 2000. Rural Conditions and Trends. Vol.10 No.2, pg 33. United States Department of Agriculture, Washington DC. <http://www.econ.ag.gov/>

UC Cooperative Extension Agricultural Producers Survey 2002

INSTRUCTIONS

Thank you for taking the time to complete this survey. *Your responses are confidential.* This questionnaire is intended for the person with responsibility for farm or ranch management decisions. If you are not associated with any type of farming or ranching operation in Marin, but lease your property for agriculture, please fill out the appropriate sections and answer the questions to the best of your knowledge. Return your completed questionnaire in the postage paid envelope provided within 7 business days. We appreciate your willingness to participate. **Please be assured that your individual responses will remain anonymous.**

Business Name: _____

Business Owner: _____

Phone: (____) _____ - _____ Fax: (____) _____ - _____

Email _____

Name of person completing survey: _____

Section 1: Primary Producer Description

- a) Type of Ag operation: Family/Individual: **70%** Partnership: **18%** Corporation: **11%**
 Other: **1%** n=95
- b) Your role in the operation: Owner: **63%** Partner: **15%** Leasing operator: **4%**
 Manager: **14%** Other: **5%** n=110
- c) Gender: Male: **73%** Female: **27%** n=94
- d) Age: **Average: 54 Min.: 30 Max.: 79 Med.: 52**
- e) Farming Experience (number of years): **Average: 33 Min.: 0 Max: 78**
- f) Do you plan to keep farming? Yes: **82%** No: **2%** Maybe: **16%** n=89
- g) Do you consider your overall operation profitable? Yes: **37%** No: **20%**
 Marginally: **43%** n=91

Section 2: Farm Operation Description

- a) Total size of operation in acres (owned and leased): **72,842 acres Average: 827.75**
53% of private land (137,000 acres)
- b) Are you leasing from another landowner? Yes: **44%** No: **56%** n=87
 If YES, how many acres? **Total: 30,619**
- c) Are you leasing land to other operators? Yes: **21%** No: **79%** n=89
 If YES, how many acres? **Total: 9,122.5**
- d) Is farming your principal occupation? Yes: **64%** No: **36%** n=87
- e) Is your land currently in an active agricultural operation? Yes: **98%** No: **2%** n=89
 If YES, what Type of Ag Operation
- Dairy: **25%** Cow/calf: **53%** Sheep: **21%** Poultry/eggs: **5%** Grapes: **10%**
 Row crops: **14%** Tree crops: **8%** Hay/silage: **10%** Cut flowers: **3%**
 Nursery crops: **3%** Aquaculture: **5%** Other: **5%** n=87

- f) Do you work off farm? Yes: **48%** No: **52%** n=84
 If YES, what percent of your time? **Average: 50%**
 Is your off-farm income agriculture related? Yes: **54%** No: **46%** n=41
- g) Do you have a conservation easement on your property? Yes (all or part): **27%** No: **73%**
 n=79
- h) Are you considering a conservation easement? Yes: **19%** No: **81%** n=58

Section 3: Farm Succession

- a) Do you own your own farm or ranch? Yes: **78%** No: **22%** n=85
 If YES, how many years and generations have you owned it?
 Years: **Average 53.48; Min: 3, Max: 168** Generations: **Average 2.98, Min.: 1, Max: 5**
- b) How many family members are currently involved in the operation?
 none: **8%** 1-2: **63%** 3-4: **23%** 5+: **6%** n=84
- c) Are family members interested in continuing farming on the property? Yes: **71%** No: **29%**
 n=73
 If YES, are you working on a farm succession plan? Yes: **60%** No: **40%** n=47
 If NO, would you like more information regarding this subject? Yes: **48%** No: **52%** n=27
- d) Do you have plans to sell all or part of your operation in the next 5 years?
 Yes, All: **1%** Yes, Part: **9%** No: **90%** n=81

Section 4: Land Leases

- a) Are you a landowner currently leasing to another operator for agricultural production?
 Yes: **20%** No: **80%** n=86
 If YES, number of acres:
 Under 60: **13%** 60-240: **38%** 240-360: **0%** 360-720: **31%** 720+: **19%** n=16
 What do you lease the land for?
 Rangeland: **71%** Irrigated Pasture: **0%** Hay/silage: **6%** Pasture for Horses: **6%**
 Grapes: **0%** Tree crops: **0%** Field crops: **6%** Other: **24%** n=17
 If no, are you interested in leasing land to a rancher or farmer? Yes: **2%** No: **72%**
 Maybe: **26%** n=50

Section 5: Farm or Ranch Diversification

- a) Have you added new products or ag enterprises to your operation in the past 5 years?
 Yes: **29%** No: **71%** n=83
 If YES, what types?
 Dairy: **4%** Cow/calf: **21%** Sheep: **8%** Poultry/eggs: **13%** Grapes: **17%**
 Row crops: **29%** Tree crops: **13%** Hay/silage: **0%** Nursery crops: **8%**
 Cut Flowers: **8%** Aquaculture: **0%** Other: **13%** n=24
- b) What information do you need to diversify into other areas? _____

- c) Do you farm all or part of your operation organically?
 Yes, All: **27%** Yes, Part: **19%** None: **54%** n=83
 If YES, how many acres are organic?: 1928
- d) Would you consider transitioning any of your operations to organic? Yes: **33%**
 No: **39%** Maybe: **28%** n=46
 If YES, what type of assistance will you need?
 Registration and certification help: **37%** Organic growing guides and methods: **31%**
 Crop varieties and opportunities: **22%** Other: **9%** n=54
- e) Do you use compost in your production practices? Yes: **46%** No: **54%** n=76
 If YES, do you make your own or purchase? Own: **66%** Purchase: **37%** n=35
- f) Are you interested in finding out more about how to make and utilize compost on farm? Yes: **39%** No: **61%** n=70

Section 6: Value Added Products

“Value added” is a term that defines the addition of value to a farm product through processing, blending, or otherwise adding economic value to the raw farm product.

- a) Are you making value added products? Yes: **24%** No: **76%** n=75
 If YES, specify what product(s) _____
 What percent of your gross sales come from value added products?
 Under 10%: **37%** 10%-20%: **14%** 20%-50%: **10%** 50%-80%: **10%**
 80%+: **29%** n=21
 If NO, are you interested in adding a value added component to your products? Yes: **47%**
 No: **53%** n=32
 Please specify: _____
- b) What information do you need to add a value added product to your farm plan?
 County permitting/regulations: **26%** Product selection: **14%**
 Processing information: **22%**
 Sales/marketing: **18%** Business planning: **16%** Other: **4%**,
 please explain__ n=77

Section 7: Selling/Marketing your Agricultural Products

- a) What percentages of your crop(s) or livestock are sold for consumption in the following markets:
 Marin: **Average 61%**
 Bay Area: **Average 69%**
 California: **Average 70%**
 National: **Average 61%**
 International: **Average 21%**
 For **Dairy** check one: CA Dairy Inc.: **15%** Clover: **10%** DFA: **30%**
 Hilmar: **20%** Safeway: **10%** Other: **15%** n=20

b) What are your selling outlets?

- Broker: **16%** Wholesale buyers: **38%** Farmers' Markets: **13%** Cooperative: **13%**
 Consumer direct from farm: **28%** CSA: **4%** Internet: **5%** Other: **10%** n=94

c) How do you get information about selling, marketing, trends and opportunities?

- Trade magazines: **37%** Trade groups, organizations or meetings: **34%** Consultants: **11%**
 Word of mouth: **48%** Internet: **13%** Other farmers: **38%** TV: **2%**
 Government: services **15%** Other: **6%** n=94

Could you use help with your marketing or selling program? Yes: **50%** No: **50%** n=64

Section 8: Inclusion in Marin County Producers Directory

Would you like to be included in the Marin County Agricultural Producers Directory that will feature our local farm and ranch products?

- Yes, I wish to be included in the upcoming directory: **32%** No, leave me out: **32%**
 I'm interested in more information about the directory: **36%** n=84

Section 9: What can we do to help you?

Please rank the following in order of importance, 1 being most and 7 being the least important.

- ___ Help clarify the county ag permitting process **62%**
___ Provide one-on-one farm consulting and field trial assistance **42%** Specify area: ___
___ Provide information workshops on farm and crop diversification **25%**
___ Help with learning how to market my farm product **34%**
___ Help with understanding "organic" and organic certification **27%**
___ Develop a Marin farm diversification website to promote your products **34%**
___ Other _____

Is your mailing label correct? Please update if necessary.

MAILING INSTRUCTIONS

After completing this survey, place it in the pre-addressed enclosed postage paid envelope and mail it to us. We appreciate your participation! We know how valuable your time is, and thank you for the time taken to help us better understand the needs of our agricultural community.