



# Yolo Food Hub Grower Survey Report - Executive Summary

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# Executive Summary

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This Yolo Food Hub Grower Survey (“Survey”) was conducted to gather specific information for the optimal creation of an effective and efficient food hub facility combined with an array of valuable services for both producers and consumers. The Survey was made up of a series of multiple choice and short answer questions. Yolo Food Hub is a new facility that will aggregate, process, store, and distribute farm produce grown in Yolo County and surrounding areas. Located in Esparto, Yolo Food Hub will expand food production and develop new market opportunities in Yolo County and the Greater Sacramento Region, while at the same time bolstering local food security, increasing employment and job training opportunities, and providing pandemic relief for farmers, consumers, and institutional buyers.

Growers and ranchers across several Northern California counties were asked to participate in a confidential on-line Survey to help measure their interest in the development of a Food Hub in Esparto, Yolo County. The Survey included questions about growers’ and ranchers’ experience on a wide variety of relevant topics. A total of 49 responses were received from over a 100 Surveys emailed to potential respondents across the region.

Items on the Survey were worded as positive statements or direct questions, and included the following measured topics:

- Portfolio of commodities produced (e.g., fruits, nuts, vegetables, Livestock, dairy, eggs, etc.)
- Size, location, and type of growing operation
- Current marketing of products, including locations and distances shipped
- Existing challenges to marketing and production
- Will a Food Hub be of assistance?
- Types of helpful services and operations provided by a Food Hub
- Employee Education and Business Planning
- Retention of jobs and new employment opportunities
- Impact of Covid-19 pandemic, wildfires, drought, and other natural disasters

## Methodology

The Survey forms and questions were developed with input from the Yolo Food Hub team and partners., including the Capay Valley Farm Shop, Spork Food Hub/Fiery Ginger Farm, Yolo Food Bank, Kitchen Table Advisors, and Valley Vision.

The final Survey form asked respondents/growers a series of quantifiable questions (31) related to their operations and potential needs. Respondents were requested through email invitations to complete the on-line questionnaire via *Survey Monkey* and to submit their answers electronically. Several follow-up emails were sent, and phone calls made to remind respondents to complete the Survey.

The Survey administrator checked returned Surveys for missing information and responses that would cause scanning errors. After scanning, the Survey responses were imported into *Microsoft® Excel* and errors were checked against the individual Survey forms. Data analysis was completed using *Excel*.

## Summary of Results

Survey responses are broken out by specific categories, as follows:

- ***Portfolio of commodities produced***
  - 89.6% of respondents grow fruits, nuts, grains, or vegetables.
  - 27.1% raise livestock, including cattle, hogs, sheep, and/or poultry.
  - 22.9% produce dairy and/or eggs.
  - 22.9% produce other products, including flowers, olive oil, herbs, rabbits, and milled flour.
  
- ***Size, location, and type of growing operation***
  - The median size of operations is 15 acres.
  - The median number of products grown was 7 commodities and an average of 90.6 livestock.
  - The median number of employees was 2.
  - 59.2% of respondents were single family/sole proprietor operations; 12.2% partnerships; and 22.5% corporations
  - Although only 33 of 49 respondents provided answers, 58.1% responded as woman-owned; and the average ethnic breakdown is 41.9% White; 12.9% Hispanic or Latino; 3.2% Black or African American; and 6.5% Asian American or Pacific Islander.
  - On average, 65.3% are from Yolo County; 18.4% from Solano County; 12.2% from Yuba County; 6.1% from Sacramento County; 2.0% from Sutter County; and 2.0% from Siskiyou County.
  - In addition, 61.2% of respondents owned their land; 18.4% leased their land; and 20.4 owned and leased their land.
  
- ***Current marketing of products, including locations and distances shipped***
  - On average, 59.2% of growers sell their products Direct to Consumers; 38.8% sell via Farmers Markets; 22.5% sell via Community Supported Agriculture (CSA); 28.6% currently sell through Food Hubs; 25.5% sell to Grocery Stores; 32.6% sell through other Distribution Networks; and 28.6% sell through other Market Channels.
  - On average, 81.2% of respondents sell their products within Yolo County and the Sacramento region; 41.7% sell outside the region, including the Bay Area, Southern California, and nationally.
  
- ***Existing challenges to marketing and production***
  - 45.5% of respondents cited lack of market access and/or limited distribution channels and their main challenge; 45.5% also noted the lack of labor as an ongoing challenge; 31.8% cited the lack of adequate water supply; 27.3% cited State and Local regulations; 22.7% noted food safety issues; 22.7% cited energy costs as a barrier; 18.1% cited access to capital; 15.9% cited access to transportation; 13.6% noted safety certification concerns; 11.4% access to land; and only 6.6% cited access to adequate broadband.
  
- ***Will a Food Hub be of assistance?***
  - 62.5% of respondents believe that a Food Hub will provide greater *market access*; 62.5% also believe a Food Hub will create *new markets*; 47.9% cited *differentiated marketing opportunities*; 41.7% are hopeful for the development of *new products, including fresh, semi-processed, processed, and value-added*; and 58.3% are excited by the *collaboration opportunities with other producers*.
  
- ***Types of helpful services and operations provided by a Food Hub***
  - On average, 84.8% of respondents would like the Food Hub to provide Distribution services; 60.9% would like Aggregation; 43.5% Marketing Services; 43.5% Commercial Kitchen; 39.1% would appreciate

- Value-Added products; 34.8% want Processing Services; 32.6% would like Processing; 23.9% Ag Supply; 21.7% Insurance; 17.4% Contracting; and 10.9% Business Planning.
  - On average, 58.7% of respondents would be willing to transport their product 20-50 miles; 39.1% less than 20 miles; 6.5% 50-100 miles; and 4.4% 100 miles or more.
  - On average, 84.8% of respondents would like Cold Storage capacity at the Food Hub; 30.4% Dry Storage; 26.1% Freezer Storage; and 4.4% Hydro Colling capacity.
- ***Employee Education and Business Planning***
    - 65.6% of respondents would like Business Services to be provided by the Food Hub (e.g., accounting, logistics, strategic planning; IT, etc.); 43.8% would like Processing training; 15.6% cited Production training; and 15.6% noted other educational opportunities like soil health, marketing, and logistics.
- ***Retention of jobs and new employment opportunities***
    - Overwhelmingly, 64.1% of respondents believe that a Food Hub would help retain jobs through increasing the long-term viability of farms; allowing farms to be more competitive; and allowing aggregation of many products to increase demand.
- ***Impact of Covid-19 pandemic, wildfires, drought, and other natural disasters***
    - Although not all respondents answered these questions, those that did respond were widely impacted: 100% were negatively impacted by COVID-19; 86.1% were impacted by Wildfires; 69.4% were impacted by Drought; and 55.6% by poor Air Quality.

## Conclusions

The Yolo Food Hub Grower Survey produced some very definitive results. The Survey received forty-nine responses, which was a highly positive response rate of 42.6% (out of 115 invitations to respond). This compares favorably to the commonly accepted average response rate to external email surveys of between 10% to 30%.<sup>1</sup> This high response rate is an indication of the interest and need for the Yolo Food Hub. More specifically, 100% of the forty-nine respondents indicated a strong interest in supplying and utilizing the services of the Yolo Food Hub.

Although the median size of operations of the forty-nine respondents was 15 acres (indicating a strong interest by smaller agricultural producers), there was also a small number of larger growers expressing interest as well. Growers also spanned a wide array of commodities, including fruit, vegetable, nut, grain, dairy, eggs, olive oil, flowers, and livestock. Additionally, growers represented a wide variety of ethnic and geographic backgrounds with also many women-owned businesses included. This indicates the potential for a variety of products and diversity of producers that could be available to market through the Yolo Food Hub.

Currently, respondents are marketing their products through multiple channels, including direct to consumers, farmers markets, CSA's, food hubs, grocery stores, and other distribution networks to buyers mainly in Yolo County and the Sacramento region, and to a lesser extent to the Bay Area, Southern California, and out-of-state. However, most growers experience challenges with lack of market access, limited distribution channels, lack of labor, lack of adequate water supply, and burdensome state and local regulations among other barriers.

Most importantly, every grower responded that a Yolo Food Hub would further bolster their business with many stating greater market access, the establishment of new markets, differentiating marketing opportunities, development of new products, and collaboration with other growers as the main reasons for their enthusiastic interest. Moreover, growers

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<sup>1</sup> <https://www.genroe.com/blog/acceptable-survey-response-rate-2/11504>

were most interested in the services the Yolo Food Hub could provide, including distribution and aggregation of products; greater marketing access and opportunity; further processing, packaging, and value added; availability of a commercial kitchen; and to a lesser extent forward contracting, business planning, insurance, and agricultural supply. Growers were also interested in employee training and educational opportunities in business planning (e.g., accounting, logistics, strategic planning, information technology, etc.); processing; and production practices. Growers believe that a Yolo Food Hub would help retain jobs through increasing the long-term viability of farms; allowing farms to be more competitive; and allowing aggregation of many products to increase demand.

In sum, the Yolo Food Hub Grower survey provides invaluable input to gauge grower interest and identify services to be potentially provided. This information will be utilized to develop an appropriate business plan and range of services through the creation of the Yolo Food Hub.