

A close-up photograph of several golden wheat stalks with long, thin awns, set against a clear blue sky. The wheat is in sharp focus, while the background is slightly blurred.

Developing Diverse Markets for Climate Resilient Agriculture

A Regional Assessment of Technical Assistance Assets and Needs | March 2025

Developing Diverse Markets for Climate Resilient Agriculture

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March 2025

PRODUCED FOR

USDA Northwest & Rocky Mountain Regional Food Business Center

Diverse Markets for Climate Resilient Agriculture Core Team

PRODUCED BY

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Introduction

The USDA Northwest and Rocky Mountain Regional Food Business Center (NWRM RFBC or “the Center”) supports farm and food businesses across Colorado, Idaho, Montana, Oregon, Washington, and Wyoming through technical assistance, coordination, and capacity building, including through its Business Builder grant program. The Center is led by Colorado State University and Oregon State University in collaboration with state-level teams and four region-wide core teams: “Building Meat Supply Chain Capacity,” “Creating Diverse Markets for Climate Resilient Ag,” “Connecting and Scaling Food Entrepreneurs,” and “Supporting Right-Size Investing and Infrastructure.”

The purpose of this report is to summarize data to inform the Diverse Markets for Climate Resilient Ag team, which is focused on “supporting the development and expansion of markets for climate resilient cropping systems producing grains, pulses, and other row crops across the NW Mountain region.”¹ Specifically, this report summarizes US Agricultural Census (2022) data and information gathered through key informant interviews, a survey of organizations that provide technical assistance (TA) to farm and food businesses, and a survey of farm and food businesses themselves to identify existing assets, partnership and coordination opportunities, Business Builder grant and other investment priorities, and technical assistance needs for businesses that grow or process grains, pulses, or pseudocereals. Note that the survey data were collected in 2024 prior to extensive changes in the federal grant funding landscape starting in Spring 2025, which may have impacted TA providers’ funding, capacity, and services.

The following executive summary provides a high-level synthesis of findings and recommendations while the subsequent report provides more detail organized by topic area. In general, each section of the report starts by summarizing US Agricultural Census data to provide a region-wide overview of the topic followed by findings from the farm and food business survey and concludes with the findings from our interviews and survey of technical assistance providers.

We also completed a companion study for the Idaho state team that provides Idaho-specific information related to each of the four core areas, which is available as a separate report. We gratefully acknowledge Colette DePhelps, Martha Sullins, Katie Baker, Tayler Reinman, and other professionals involved in the Center for their help developing the survey instruments and data collection strategies and for their help engaging technical assistance providers and farm and food businesses throughout the service region.

¹ <https://nwrockymountainregionalfoodbusiness.com/climate/>

**Developing Diverse Markets
for Climate Resilient Agriculture:**

A Regional Assessment of Technical
Assistance Assets and Needs

Executive Summary

March 2025

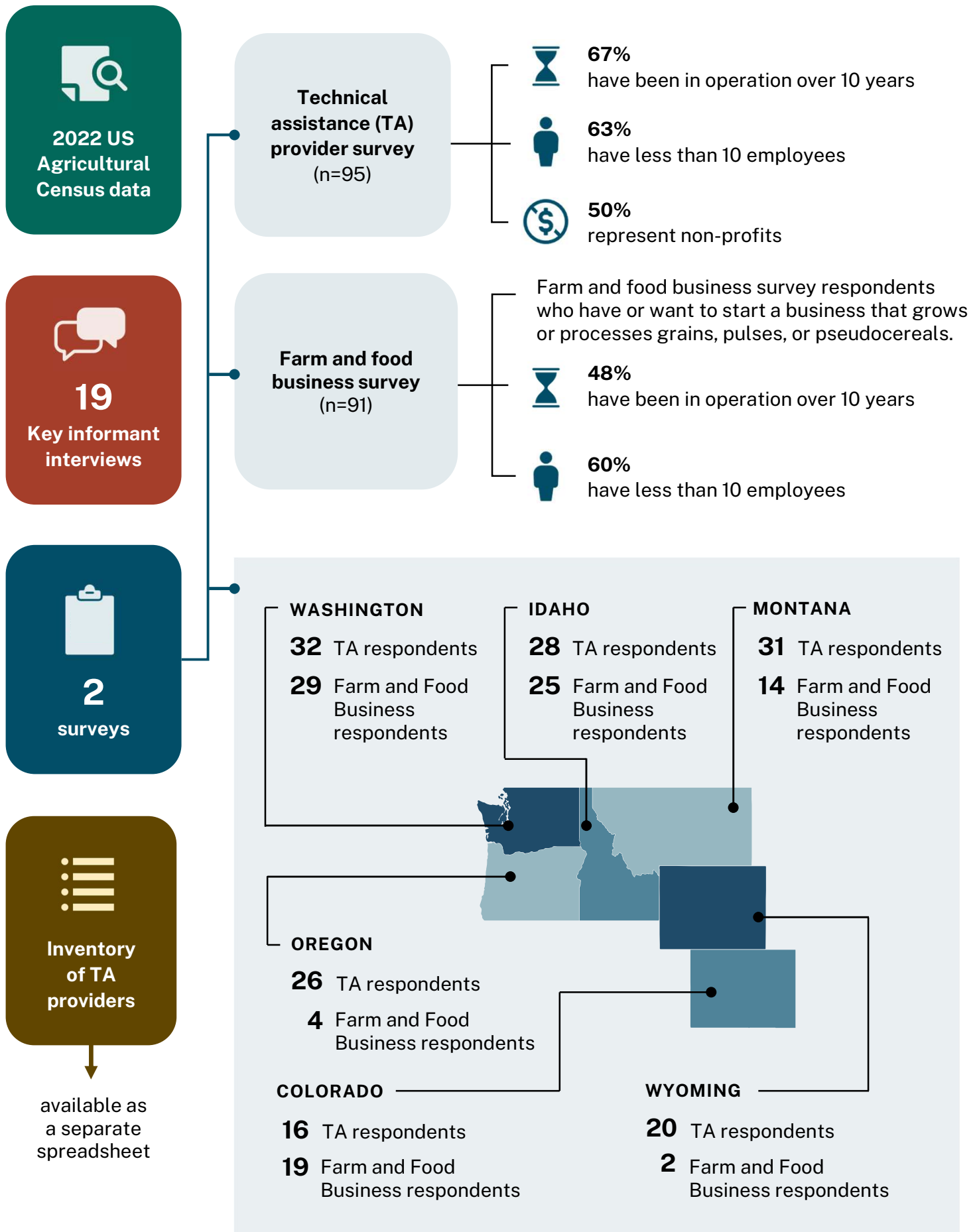
PURPOSE

This project aims to help the USDA Northwest and Rocky Mountain Regional Food Business Center's (NWRM RFBC or "the Center") "Diverse Markets for Climate Resilient Ag" team identify partnership and coordination opportunities, Business Builder grant and other investment priorities, and technical assistance needs for businesses that grow or process grains, pulses, or pseudocereals.

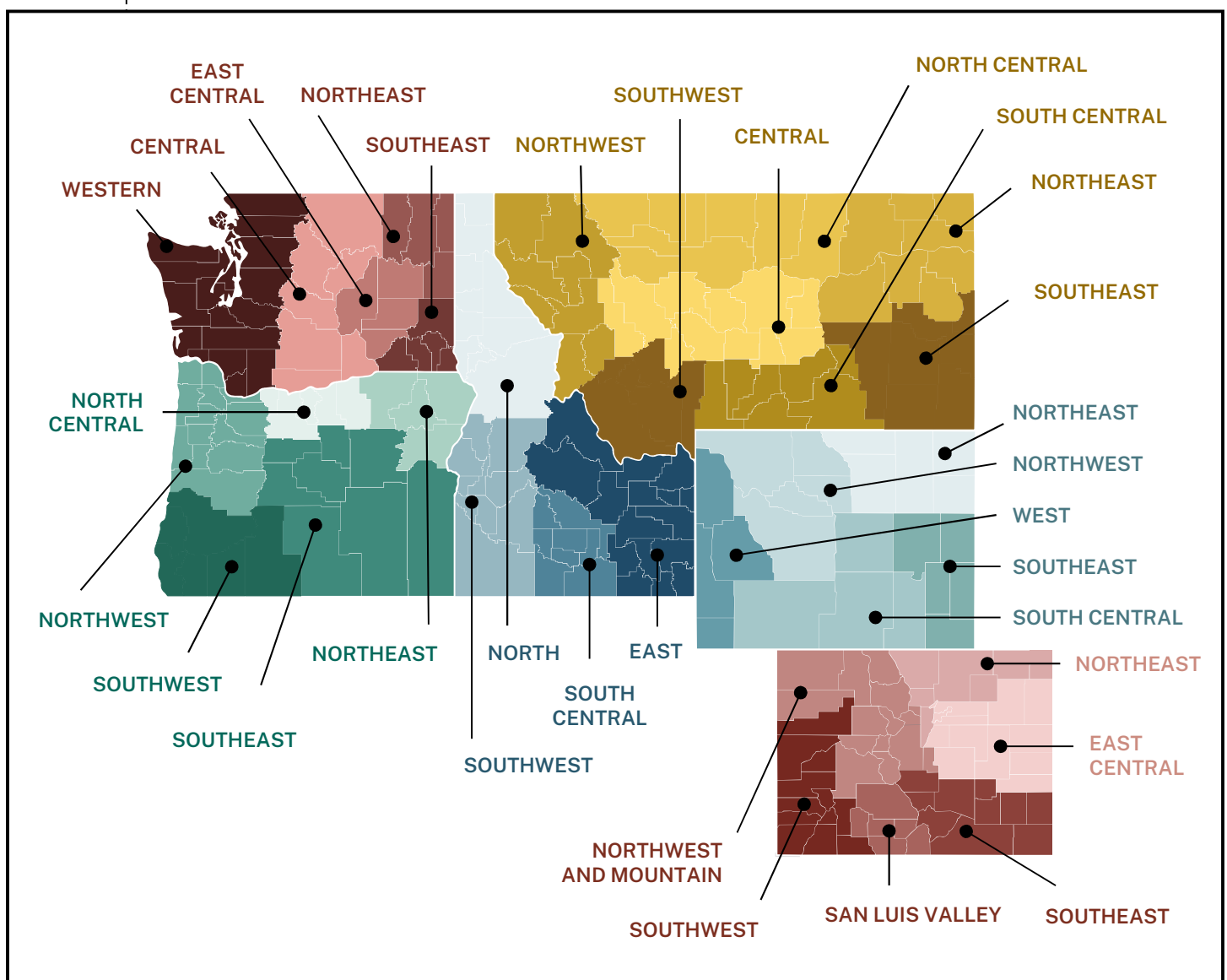
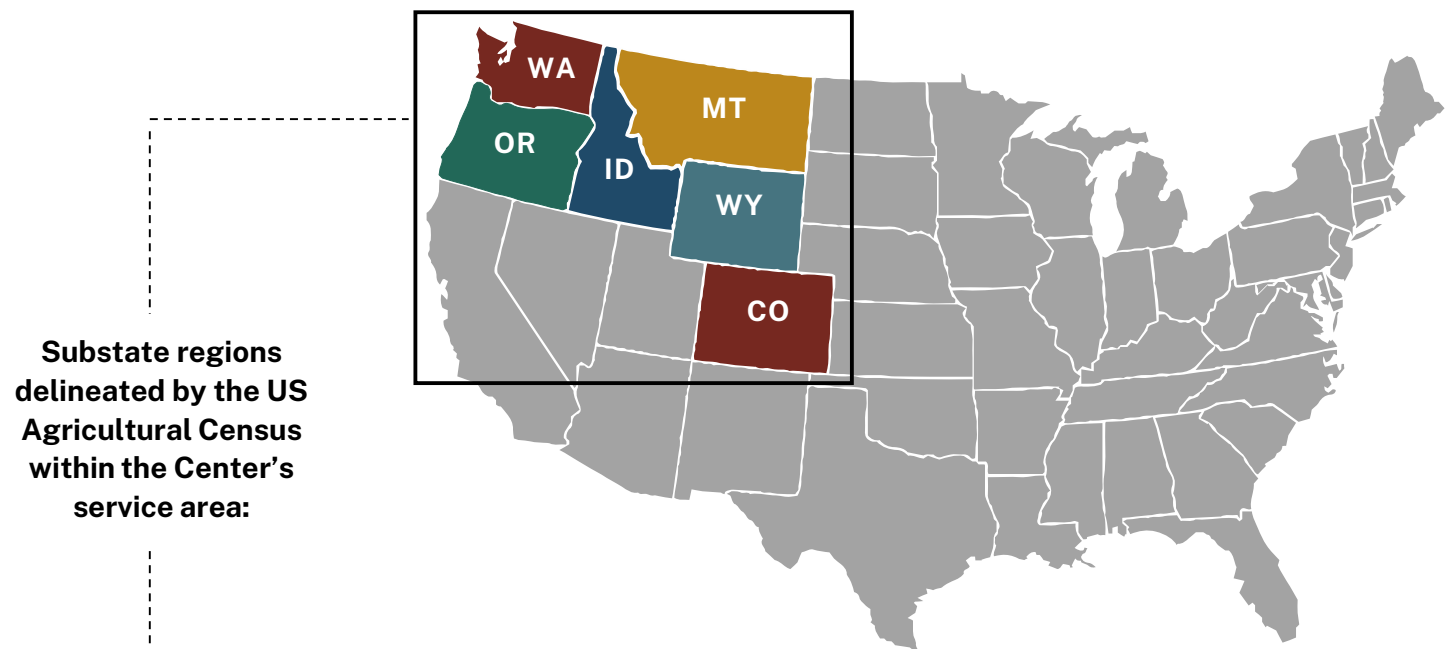


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DATA

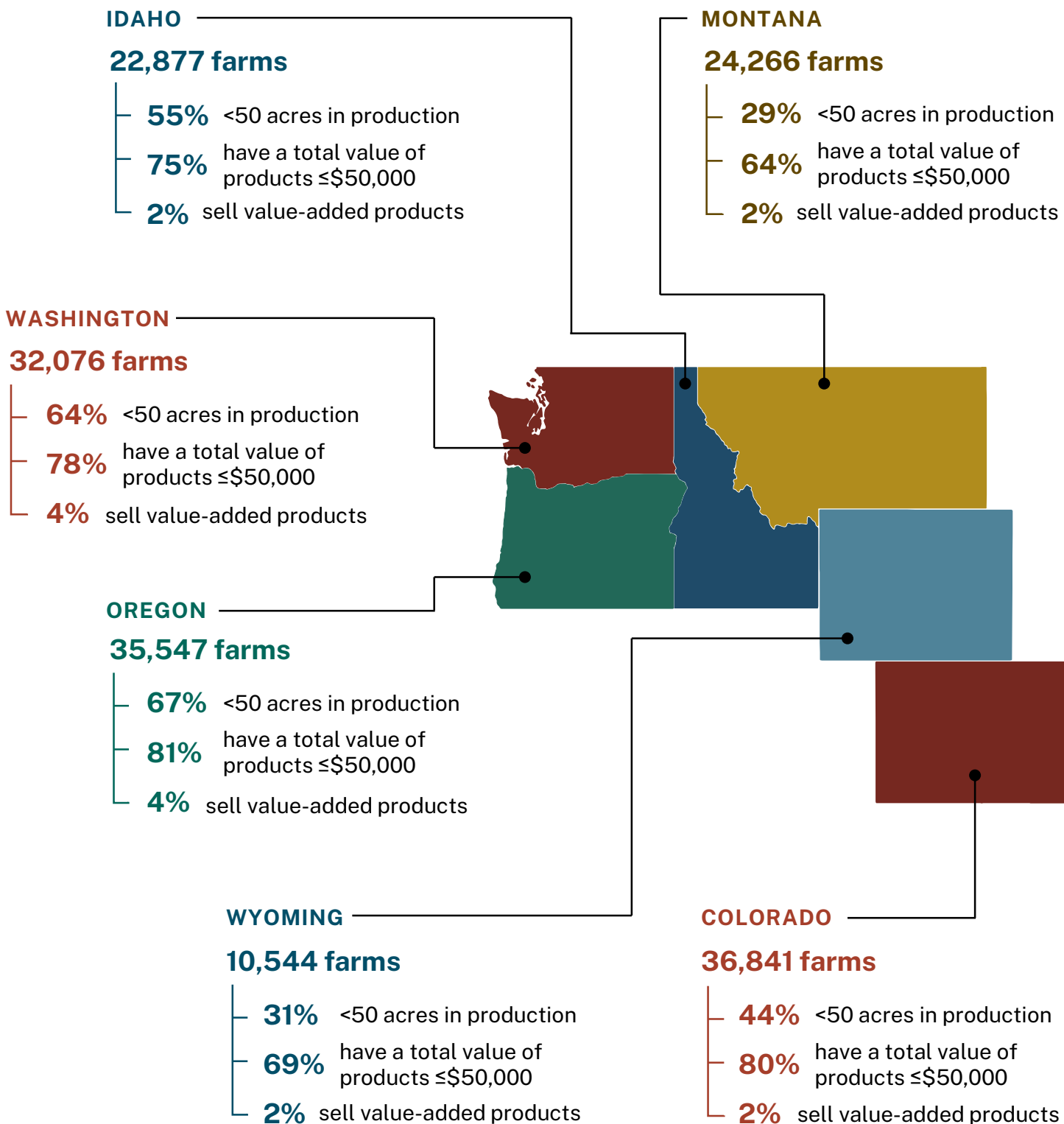


STUDY AREA



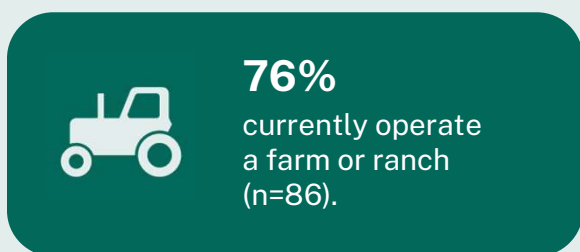
FARM SCALE AND OTHER CHARACTERISTICS

There are **162,151 farms** in the Center's six-state service area (US Ag Census, 2022).



SURVEY RESPONDENTS

Farm and food business survey respondent business characteristics



80% grow field crops like grain or pulses.

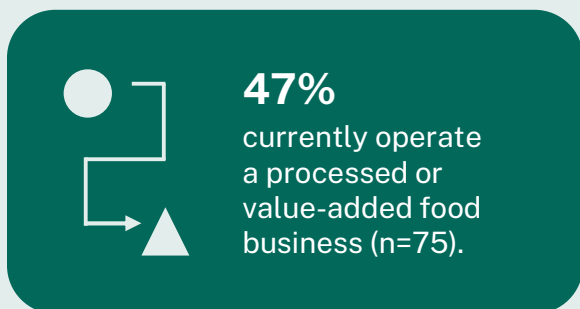
In addition to growing or being interested
in growing or processing field crops,



46% grow fruits, vegetables,
or herbs, and



29% raise livestock.



73%
make grain, pulse, or seed-based
value-added products (n=33).

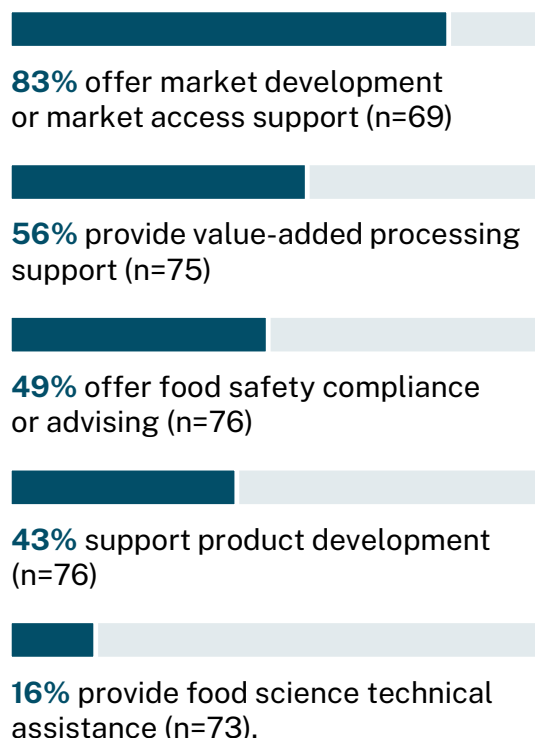


81%
of respondents who do not already make
value-added products to sell are interested
in starting (n=38).

Percentage of farm and food business respondents that
have high or moderate need for TA, services, and
infrastructure related to selling value-added products:



Technical assistance provider
survey respondents offer support
for value-added products:



PRODUCTION CHARACTERISTICS

Number of farms in the six-state region by crops grown:



COMMON GRAINS

- 9,993 grow **winter wheat**
- 4,535 grow **spring wheat**
- 3,904 grow **barley**
- 3,759 grow **corn (for grain)**
- 706 grow **durum wheat**
- 618 grow **oats**



PULSES

- 1,368 grow **dry peas**
- 843 grow **lentils**
- 671 grow **chickpeas**
- 663 grow **dry beans**



LESS-COMMON GRAINS

- 655 grow **sorghum**
- 596 grow **proso millet**
- 131 grow **triticale**
- 76 grow **rye**
- 9 grow **emmer and spelt**

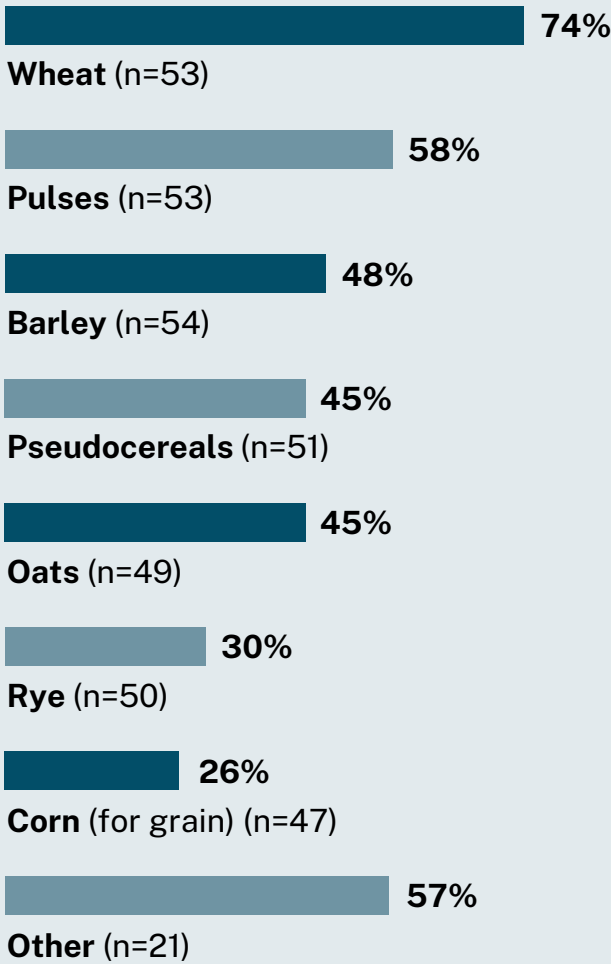


SEEDS, PSEUDOCEREALS, AND OTHER SELECT CROPS

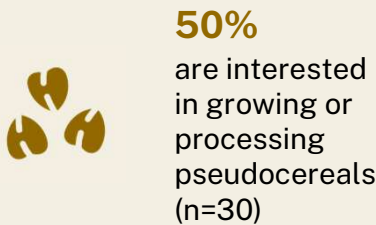
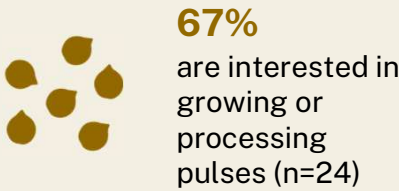
- 2,112 grow **potatoes**
- 895 grow **canola**
- 303 grow **mustard**
- 189 grow **flaxseed**
- 157 grow **soybeans**
- 49 grow **buckwheat**
- 17 grow **sunflower seeds**

PRODUCTION CHARACTERISTICS (CONTINUED)

Row crops grown or processed by farm and food business survey respondents:



Of farm and food business survey respondents who are not already,



Barriers impacting farm and food business survey respondents' ability to grow, process, or sell 'climate-resilient' grains and pulses include:


Buyer education

 Climate

 Markets

 Labor

 Sourcing

 Infrastructure

 Transportation

PRODUCTION CHARACTERISTICS (CONTINUED)

2,642 farms (1.2%)

in the six-state region are certified under USDA’s National Organic Program (NOP) production practices or have acres transitioning to organic production.



of farms using certified organic production practices are in Washington.

Number and percentage of farms implementing select conservation practices in the service area:



17,793 (11%)
No tillage



14,177 (9%)
Precision agriculture



13,716 (8%)
Conservation tillage
(excluding no till)



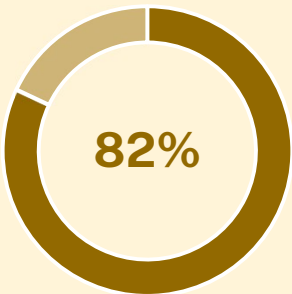
9,698 (6%)
Cover crops



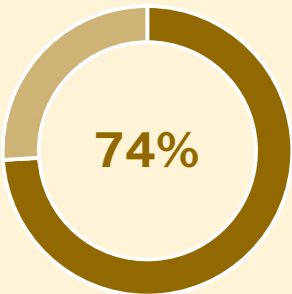
5,139 (3%)
Conservation easements



2,642 (1%)
Organic



of farm and food business survey respondents reported using no-till or low-till practices (n=34)



reported using conservation cover (n=35).

PRODUCTION CHARACTERISTICS (CONTINUED)

CONSERVATION PRODUCTION PRACTICE		% of farm business survey respondents who use the practice	% of farm business survey respondents who do not use the practice but are interested
	No-till or low-till	81% (n=34)	43% (n=7)
	Conservation cover	74% (n=35)	33% (n=9)
	Green fallow	69% (n=35)	27% (n=11)
	Integration of livestock	69% (n=35)	55% (n=11)
	Riparian buffers	63% (n=32)	21% (n=14)
	Interseeding	56% (n=32)	67% (n=15)
	Prescribed grazing	55% (n=33)	53% (n=15)
	Water-efficient irrigation	50% (n=32)	18% (n=17)
	Stripcropping	28% (n=32)	42% (n=24)

PRODUCER CHARACTERISTICS



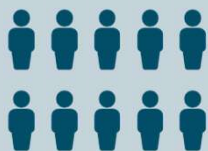
The service
area has
305,452
producers.

- **41%** are women
- **10%** are active-duty military or veterans
- **31%** are new and beginning producers (≤ 10 years experience)
- **8%** are young producers (< 35 years old).
- **93%** are white
- **1.2%** are American Indian or Alaska Native
- **$< 1\%$** are Asian
- **$< 1\%$** are Black or African American
- **$< 1\%$** are Native Hawaiian or Other Pacific Islander
- **1.1%** are two or more races

Farm and food business survey results

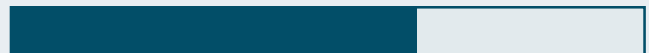


52%
of farm and food business
survey respondents said
their business has been in
operation 10 years or less.

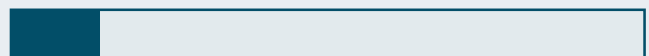


81%
have less than 10
employees.

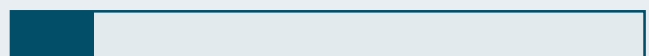
Farm and food business survey respondents
reported representing the following
historically underserved groups:



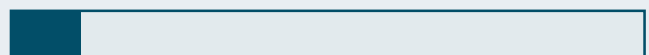
64% were woman-owned businesses



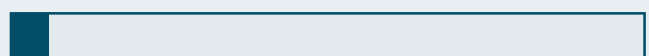
14% were BIPOC-owned businesses



13% were limited-resource farms or ranches



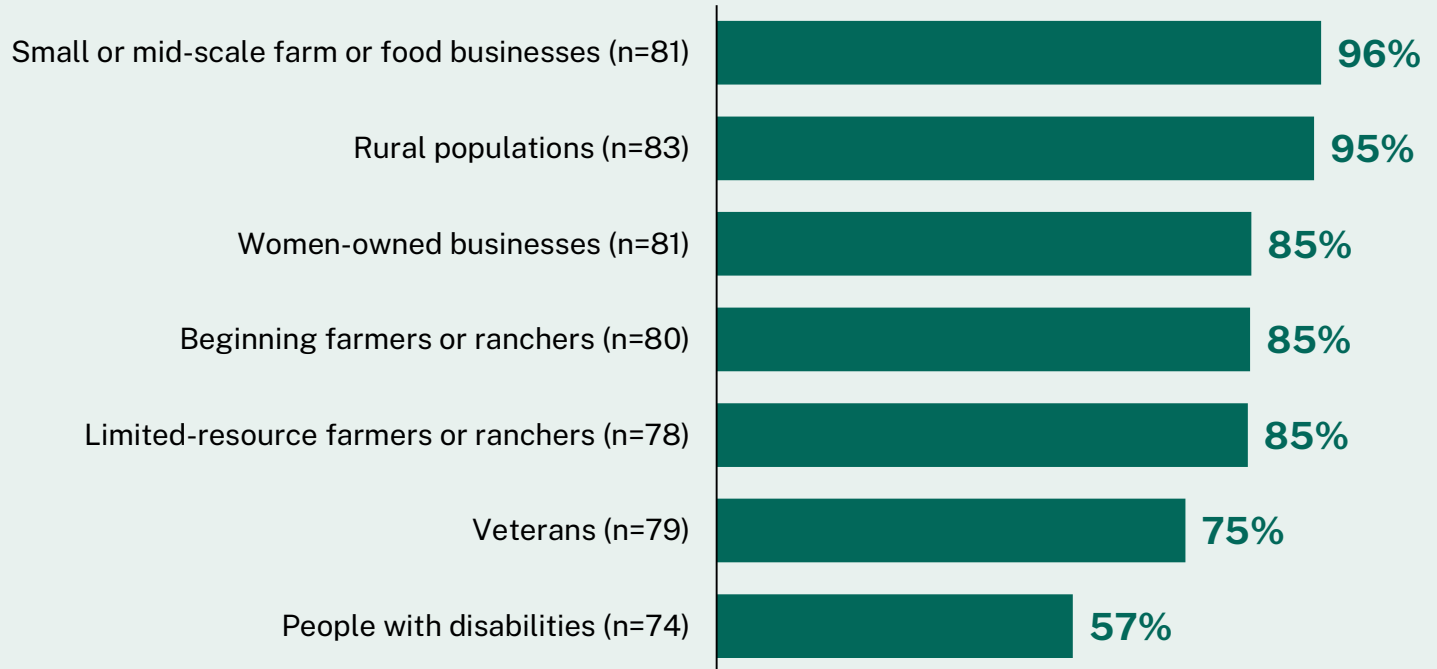
11% were veteran-owned businesses



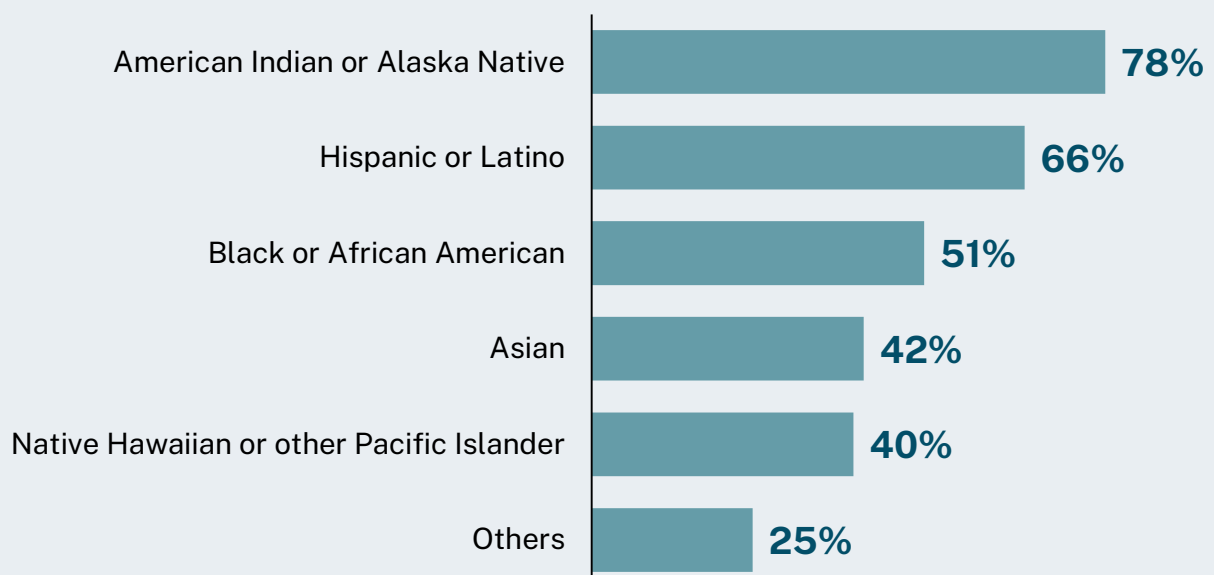
6% were Hispanic/Latino-owned businesses

PRODUCER CHARACTERISTICS (CONTINUED)

Percent of TA provider survey respondents who said their organization focuses on serving businesses led by people from select populations. Respondents could select multiple answers.



Percent of TA provider survey respondents whose organizations focus on serving businesses led by people from specific racial or ethnic groups. Respondents could select multiple answers (n=65).



PRODUCER CHARACTERISTICS (CONTINUED)

Key informant interviewees affiliated with Tribes had suggestions for **how the Center can best support Native farm and food businesses**, including building and strengthening partnerships with Tribes, Tribal entities, and organizations by and for Native people and supporting Tribes' efforts to protect culturally important first foods and traditional knowledge.

Primary themes from TA provider survey respondents on how the Center can help ensure programs are accessible to underserved businesses (n=62):



35%

of TA provider survey respondents' organizations offer technical assistance and/or resources in **Spanish**.



11%

offer support in **other languages**.

PRIMARY BARRIERS

TA provider interviewees experience to expanding the audiences they reach:



Capacity



Geography and rural communities



Internet and technology access



Language



Trust

Business development and general topics

Farm and food business survey respondents that grow or process grains, pulses, and other field crops reported a high or moderate need for technical assistance, including:



70%

Market development or market access support (n=69)



58%

Support understanding and navigating local, state, or federal regulations (n=74)



58%

Product pricing support (n=76)



56%

Accounting or budgeting support (n=76)



55%

Supply chain management support (n=70)

Percentage of **technical assistance provider survey respondents** that provide various support services:



83%

Market development or market access support (n=78)



58%

Supply chain management (n=73)



56%

Value-added processing (n=75)

PRIMARY THEMES

from TA provider survey respondents on how the Center should invest to strengthen business viability and market access for climate-resilient grains and pulses (n=36)



Collaboration



Education



Funding



Marketing

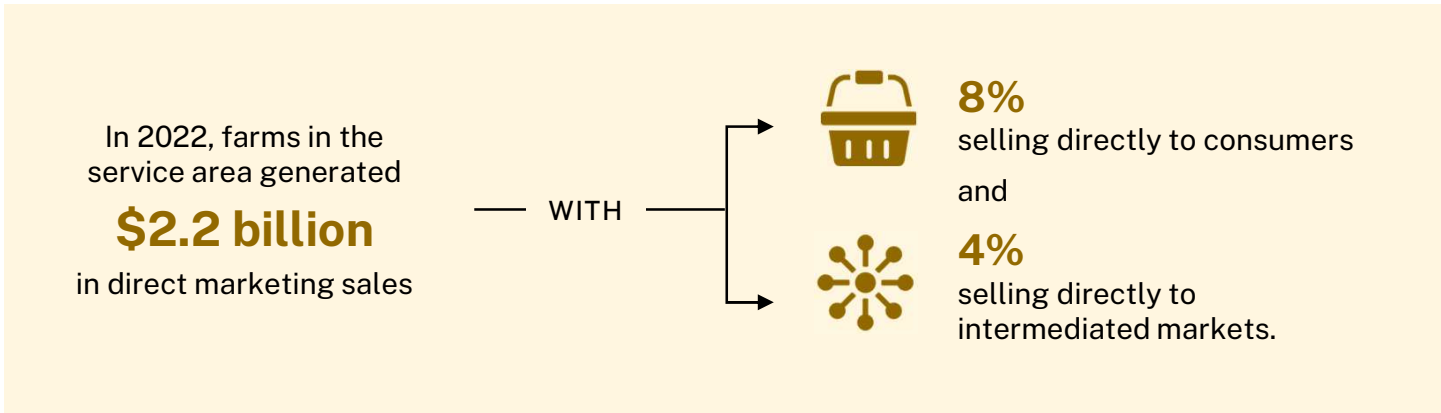


Production



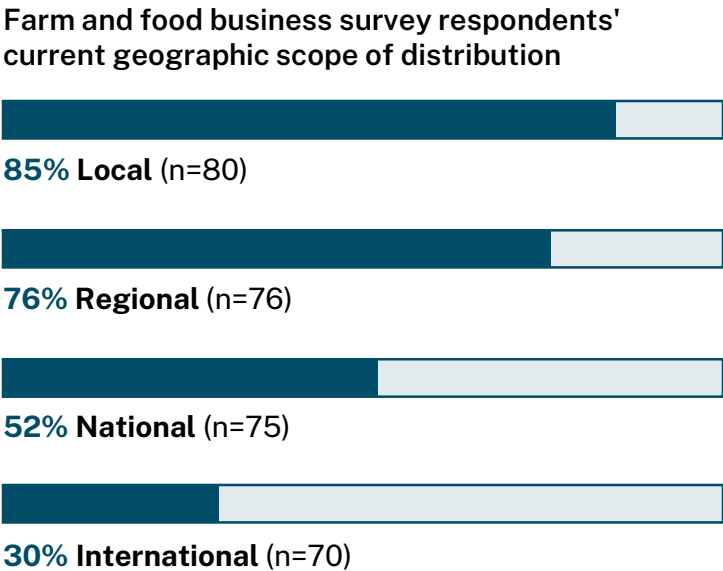
Trainings

Market channels



- Top 5** market channels used by farm and food business survey respondents:
- 1 **Their own website**
 - 2 **Third-party food processor**
 - 3 **Grocery/retail**
 - 4 **Restaurant**
 - 5 **Farmer’s market**

- Top 5** market channels that farm and food business survey respondents are very or somewhat interested in selling through (if they are not already):
- 1 **CSA or subscription**
 - 2 **Food hub**
 - 3 **Their own website**
 - 4 **Third-party processor**
 - 5 **Grocery/retail**



Market channels (continued)



76%

of farm and food business survey respondents are somewhat or very **interested in backhauling opportunities** (n=72).

Technical assistance provider survey respondents' perspectives on business and supply chain needs for developing local and regional supply chains for climate-resilient grains and pulses

Percent of respondents who ranked the following needs either a moderate or high need.



78%

Distribution
channels
(n=66)



70%

Local and regional
markets
(n=67)



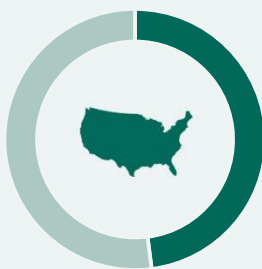
74%

Branding or
marketing support
(n=67)



70%

Business
development support
(n=67)



48%

National
markets
(n=65)



28%

International
markets
(n=64)

CREATING DIVERSE MARKETS FOR CLIMATE-RESILIENT AG (CONTINUED)

Top 5 third-party certifications and labels most used by farm and food business survey respondents:

- 1 Certified Organic
- 2 Non-GMO
- 3 Gluten-free/Allergen-free
- 4 Regenerative Organic Certified, Certified Regenerative, or Certified Regenified
- 5 Kosher/Halal

Top 5 third-party certifications and labels that farm and food business survey respondents are interested in using if they do not already:

- 1 Regenerative Organic Certified, Certified Regenerative, or Certified Regenified
- 2 Non-GMO
- 3 Climate Neutral Certified
- 4 Certified Organic
- 5 Certified Naturally Grown



45%

of food and farm business survey respondents indicated they had a moderate or high need for help understanding and evaluating third-party certifications for their products.

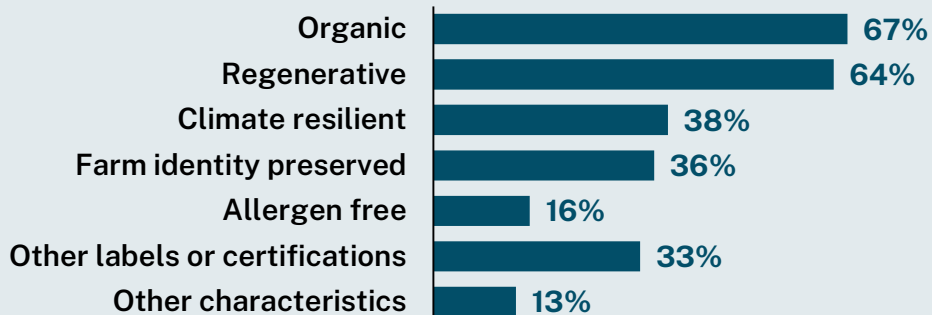
Top 5 characteristics used by farm and food business survey respondents to market products:

- 1 Local or regional
- 2 Organic
- 3 Farm-identity preserved
- 4 Regenerative
- 5 Heritage or heirloom

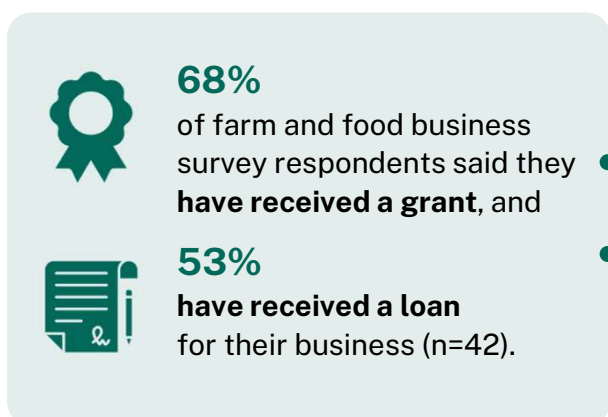
Top 5 characteristics farm and food business survey respondents are interested in using to market their products that they do not already:

- 1 Local or regional
- 2 Farm-identity preserved
- 3 Climate resilient/Climate smart
- 4 Organic
- 5 Heritage or heirloom

Percentage of technical assistance provider survey respondents that offer TA and resources related to certifications and marketing characteristics (n=45)



Funding support



61% of farm and food business survey respondents said **obtaining grant funding** has been very or somewhat difficult.

75% said **getting a business loan** has been very or somewhat difficult.

Percentage of farm and food business survey respondents who ranked the following technical assistance needs either a moderate or high need.

75% Support identifying or applying for grants (n=76)

58% Support developing a financing plan or investment strategy (n=75)

38% Support identifying or applying for loans (n=75)

Percentage of technical assistance survey respondents' organizations that offer the following funding technical assistance

78% Support identifying or applying for grants (n=67)

42% Support developing a financing plan or investment strategy (n=66)

60% Support identifying or applying for loans (n=67)

Infrastructure

47% of farm and food business survey respondents use a third-party processor for milling, malting, repackaging, or other processing activities (n=53).

↳ **54%** of those who do not already are somewhat or very interested in doing so (n=24).

Infrastructure that farm and food business survey respondents ranked as being of **moderate or high need** include:

62% → **47%**

More distribution service options (n=70)

Many TA survey respondents said their organizations **provide**:

Distribution services (n=73)

57% → **56%**

More value-added processing service options (n=70)

Value-added processing services (n=75)

59% → **34%**

More storage service options (n=71)

Storage service options (n=74)

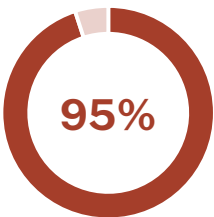
LIVESTOCK INTEGRATION

Number of farms in the six-state region that raise livestock, by type

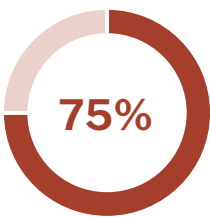


25,847
farms in the service area use rotational or management-intensive grazing practices.

Farm and food business survey respondents identified USDA-inspected slaughter/processing and on-farm meat locker storage as the **top two meat processing infrastructure needs**, ranking them as moderate or high priority:



cited USDA-inspected slaughter/processing (n=19)



cited on-farm meat locker storage (n=20)

Top 3 third-party certifications and labels **used by** farm and food business survey respondents related to livestock are:

- 1 **Animal Welfare Approved**
- 2 **Certified Humane**
- 3 **American Grassfed Certification, or other grass-fed certification**

Top 3 third-party certifications and labels farm and food business survey respondents **are interested in adopting** related to livestock are also:

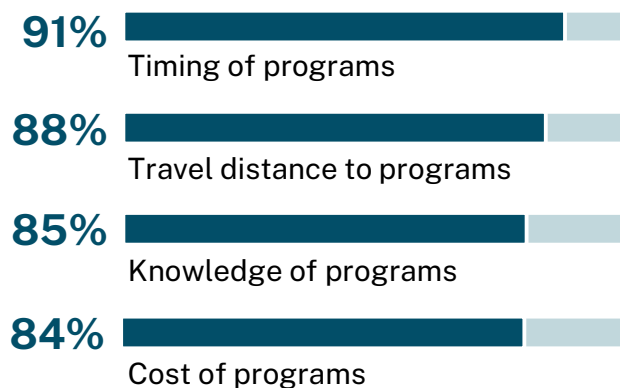
- 1 **Animal Welfare Approved**
- 2 **American Grassfed Certification, or other grass-fed certification**
- 3 **Certified Humane**

Percentage of farm and food business respondents who ranked the following market development and other support for meat producers or processors needs either a moderate or high need (n=17).



CONNECTING AND SCALING FOOD ENTREPRENEURS

Percentage of farm and food business survey respondents who experience either a moderate or significant challenge accessing TA for the following reasons (n=56):



Top 3 resources that farm and food business survey respondents reported being somewhat or very interested in include:

- 1 **Networking opportunities with other farm/food businesses**
- 2 **One-on-one advising, mentoring, or business coaching**
- 3 **Directory of organizations that provide TA or other support in their area**

Percent of technical assistance provider survey respondents' organizations that offer the following support.



89%
In-person workshops or trainings (n=79)



85%
Online resources (n=79)



84%
Networking opportunities (n=79)

93%

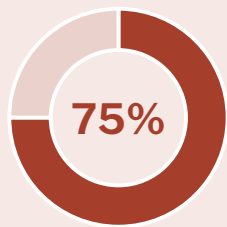
of TA provider survey respondents are interested in partnering with the Center (n=68).

75%

of TA provider survey respondents reported their organization has moderate or high capacity to increase the number of clients they serve per year (n=70).

RECOMMENDATIONS

Maximize use of existing TA capacity



of TA providers said they **have high or moderate capacity to increase the number of clients they serve**, and nearly all are interested in partnering with the Center.



Connecting food businesses to this unused capacity requires communication and coordination among providers, which is a recognized need.



Suggestions to increase farm and food business access to needed supports in general include

- Maintaining a clearinghouse of technical assistance providers, services, and resources.
- Providing resource navigation, referral, and coordination support.
- Coordinating convenings, meetings, working groups, conferences, and other networking opportunities for TA providers, to connect TA providers with farm and food businesses, and to foster peer networking and learning among farm and food businesses.
- Connecting farmers, food businesses, and researchers across the region who are already engaged or interested in production and processing of diverse grains and field crops. Several assessment participants said farmers, value-added food businesses, and researchers across the region working with less common grains, pulses, and pseudocereals are generally siloed and could be better connected for mutual benefit.

Participants recommended

- Creating a directory of farm and food businesses that grow or process these types of crops to facilitate connections among businesses throughout the supply chain and to increase visibility for consumers.
- Increasing networking opportunities.



When it comes to funding development, the greatest number of farm and food business respondents have the highest need for support identifying or applying for grants, which is a service 78% of TA survey respondents provide.



One-on-one advising, mentoring, or business coaching is among the types of support businesses are most interested in. Farm and food businesses and TA organizations offer this type of support, which could be expanded.

RECOMMENDATIONS (CONTINUED)

Address a multiplicity of needs



A great diversity of farm and food businesses in terms of scale, crops, practices, and goals requires **general resources** for common needs, **targeted resources** for specific needs, and **adaptable resources** for multiple contexts.



Programming needs to be delivered through multiple modes, including for those in rural areas and with limited internet.



Underserved and specific audiences, including rural, small-scale, women-owned, veteran-owned, beginning, and ethnic or racial minority-owned farm and food businesses continue to need targeted support. The TA providers who participated in this assessment demonstrate there are many partner services and resources available that the Center can help expand, promote, and leverage. To reach diverse and historically underserved audiences, assessment participants recommended:



Promoting and supporting existing organizations, programs, services, and resources, including partnering with organizations by, for, and with established trusted relationships with and in the community of interest.



Building relationships with partners and clients in person in addition to remotely.

Provide market development and marketing support

Farm and food business survey respondents expressed strongest interest in expanding into third-party processor, grocery/retail, institutional, and food hub markets, suggesting the **need for more support scaling and developing capacity to interact with intermediated markets.**

The highest TA need for the greatest number of farm and food survey respondents is **market development or market access support**, which is also the type of support the greatest number of technical assistance provider participants said they offer, further suggesting the need for resource navigation services to connect businesses to the support they need. At the same time, few existing TA organizations are providing the depth of support needed.

To address the gap the NWRM RFBC could:

- Provide market and supply chain development training to help TA providers develop their related programs, services, and resources.
- Support farm and food businesses through market development and workshops, conferences, one-on-one support, and so on.
- Help coordinate work groups, grant proposals, networking, and other programs and project-specific support.
- Convene conferences, panels, match-making, and other events that bring supply chain participants together to network and collaborate on opportunities.

RECOMMENDATIONS (CONTINUED)

Provide market development and marketing support (continued)



Explore and develop local, regional, national, and international supply chain and market opportunities wherein farms and food businesses can gain a premium for their “climate-resilient” practices and products.

Assessment participants said there is need to develop both direct markets and markets with greater volume capacity. Participants tended to share more enthusiasm for local and regional market and supply chain development; however, there could also be values-based supply chain and short food supply chain opportunities worth fostering with international buyers willing to pay price premiums. For example, artisan noodle makers seeking to source grain grown with practices that allow them to make authentic sustainability-based marketing claims. Markets at broader scales may have more capacity to absorb greater volume than local and regional markets alone.



Several assessment participants pointed to the **need to invest in consumer education about the health, agricultural, and environmental benefits of “alternative” grains and row crops** to help build domestic markets.



Continue exploring strategies, such as certifications, that reward producers for implementing sustainable practices.

While the percentage of all producers implementing conservation practices in the service area is relatively small, hundreds to thousands of producers are already implementing select practices in all states. Further demonstrating agronomic and economic benefits gained from their efforts is important for enabling and encouraging broader adoption. The majority of those who opted to participate in the survey — and therefore likely a core audience for the Center’s programs — are implementing or interested in implementing many conservation practices.



Address interest, lack of information, and navigation of labels and certifications as a marketing tool. Many businesses said they need help understanding and evaluating third-party certifications for their products.

RECOMMENDATIONS (CONTINUED)

Coordinate and participate in collaborative efforts to obtain funding for TA for the region



Many farm and food businesses said they need help identifying funding opportunities, developing grant proposals, and with organizational and business development to increase their funding readiness and competitiveness.



To leverage resources, the Center has the opportunity to partner with regional, state, and local TA partners on projects across larger geographies. The Center will need to be strategic, so it does not compete with existing TA providers for funding they are already accessing.



Many programs require match or a planning phase before being successful for larger grants. Business Builder grants could provide the match or funding for the planning work necessary to be successful for larger grants or loans. For example, some state programs, such as the Community Economic Revitalization Board program in Washington State, expect nonstate funds for match and require preliminary planning and feasibility stages before funding food infrastructure development. Another example is the USDA Regional Food Systems Partnership program that requires both match and extensive coordination beforehand to develop a successful proposal. A relatively small planning grant could leverage multi-year funding for the Center and its partners.

Address production barriers

Despite increasing interest throughout the region in recent years in artisan and diversified grains and row crops, relatively few farms currently grow crops like emmer, spelt, proso millet, rye, sorghum, triticale, oats, buckwheat, flaxseed, and to a lesser extent pulses. This assessment did not explore production TA gaps and needs; however, some considerations that emerged from the data related to supporting increased production include:



Evaluating and addressing crop insurance and other structural barriers.



Supporting agronomic research and outreach, for example, related to crop varieties and crop- and production region-specific recommendations for fertility and pest management.

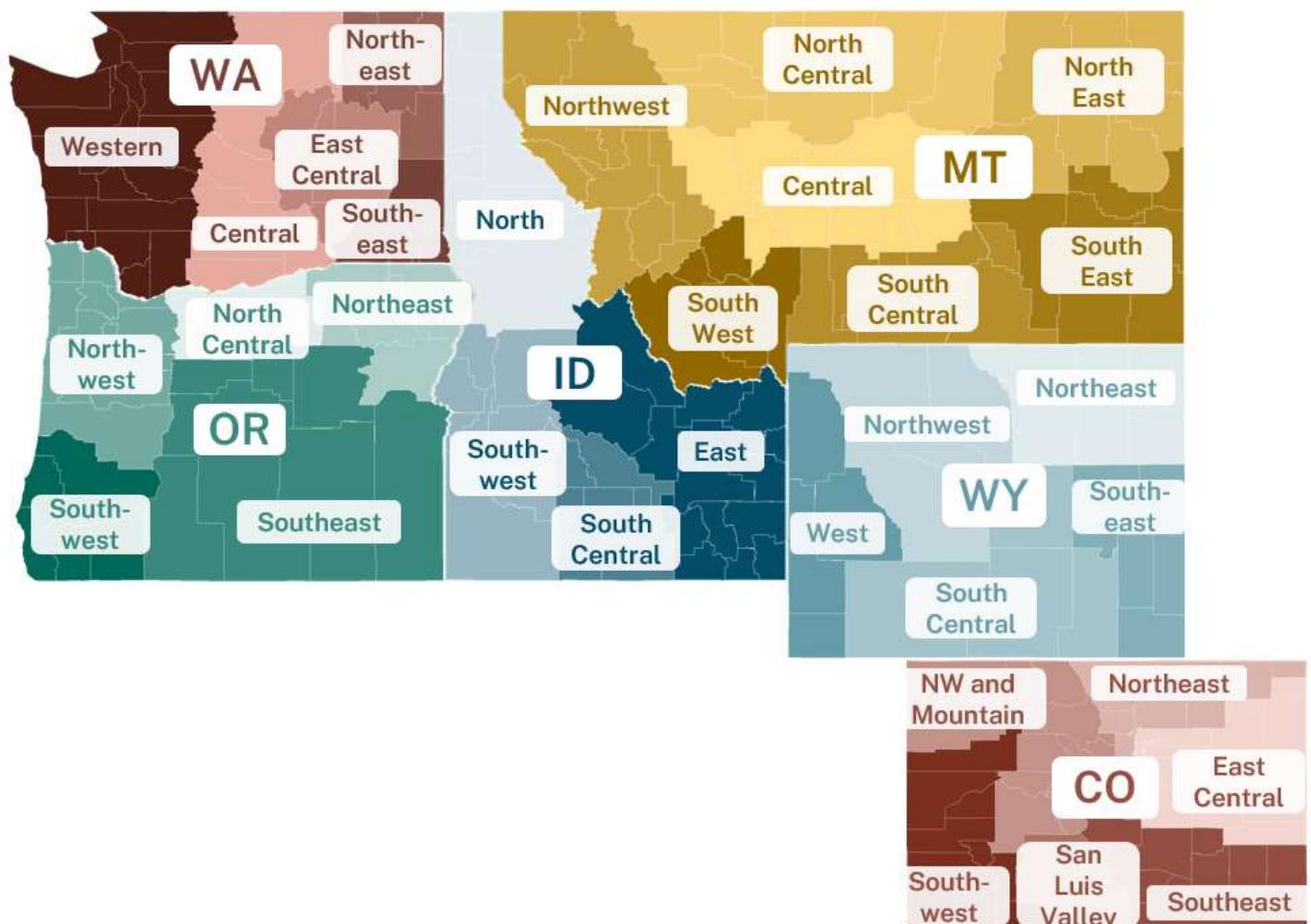
Developing Diverse Markets for Climate Resilient Agriculture: A Regional Assessment of Technical Assistance Assets and Needs

Methods and analyses

US Agricultural Census data

The secondary data summarized in this report comes from the USDA National Agricultural Statistics Service (NASS) 2022 Census of Agriculture. Throughout the report, we refer to the Center’s six-state region encompassing Colorado, Idaho, Montana, Oregon, Washington, and Wyoming as the “service area.” Service area data is disaggregated by state and USDA NASS-delineated substate regions (Figure 1). See Appendix A for the list of counties that make up the substate regions. In data summary tables, “(D)” refers to data “withheld to avoid disclosing data for individual operations” and “*” refers to no data available.

FIGURE 1 | NWRM RFBC service area by state and substate region

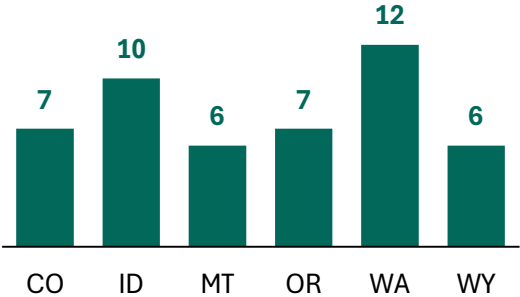


Key informant interviews

We conducted in-depth, semi-structured interviews with 19 key informants representing a range of organizations that provide TA and have different areas of expertise throughout the service area (Figure 2). Interviewees included key informants with state-, topic-, and population-specific insight and represented a range of TA organizations including business development centers, lenders, food hubs, and marketing organizations. Colette DePhelps (University of Idaho), Martha Sullins (Colorado State University), and Jennifer Faulkner (University of Wyoming) provided the initial list of potential key informant interviewees, which we then expanded through referral sampling. We conducted interviews by phone or Zoom from June to September 2024. Interviews lasted 45-60 minutes, were audio recorded with permission from participants, transcribed, and coded in ATLAS.ti software to identify key themes and topics.

In addition to the 19 interviews that we completed specifically for this project, we included nine relevant interview transcripts in the ATLAS.ti analysis that we completed in Fall 2023 and Spring 2024 through other topically related research projects. The additional nine interviews we included followed the same methods (i.e., they were semi-structured, completed by phone or Zoom, and audio recorded and transcribed with permission). We coded the relevant sections of those additional transcripts in the ATLAS.ti frame for this study to complement and expand the data. We do not include quotes from the additional nine interviews in this report but rather used those additional perspectives to help inform the types of questions and topics included in the TA provider and farm and food business surveys (described subsequently).

FIGURE 2 | Number of technical assistance providers interviewed by state (n=19). Some interviewee’s organizations serve businesses in multiple states.



Technical assistance provider survey

We used the findings from the interviews to develop a survey for farm and food business TA providers. The purpose of this survey was to gain their perspectives on the technical and funding assistance that already exists and that is still needed for small-scale, mid-scale, and historically underserved farms and food businesses in their service areas and to identify partnership opportunities.

The initial contact list included 183 organizations that provide TA to farm and food businesses in the region that we were able to identify through internet searches, referrals from state and core team partners, and referrals from interviewees. The Arrowleaf Consulting team emailed the 183 contacts on our list a first request to participate in the web-based survey on July 31, 2024, followed by three follow-up email reminders spaced one week apart. Partners from the Center’s state and core teams also emailed the request to participate in the survey to TA professionals in their networks. A total of 95 TA providers participated in the survey. Figures 3 and 4 show TA provider survey respondents’ location by state.

The survey asked TA providers to indicate the type of organization they work for. Table 1 shows the number of respondent organizations that serve each state by organization type and total percentages by category of organization are displayed in Figure 5. Half of respondents represented nonprofits, and 30% represented business development centers.

FIGURE 3 | *Count of technical assistance provider survey respondents who serve each state (n=85)*

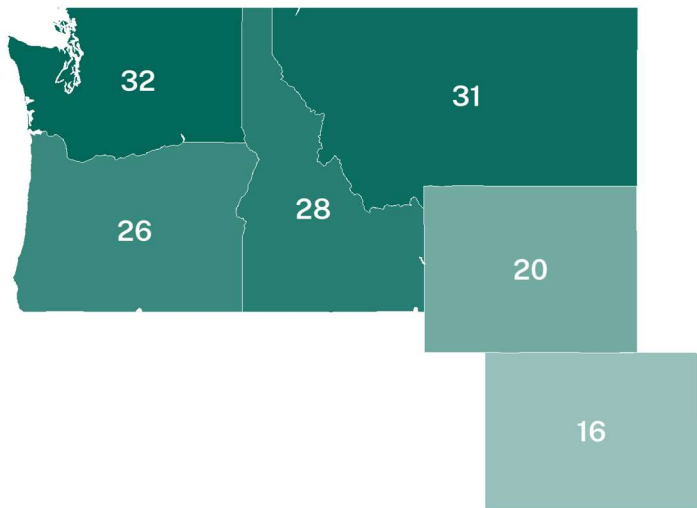
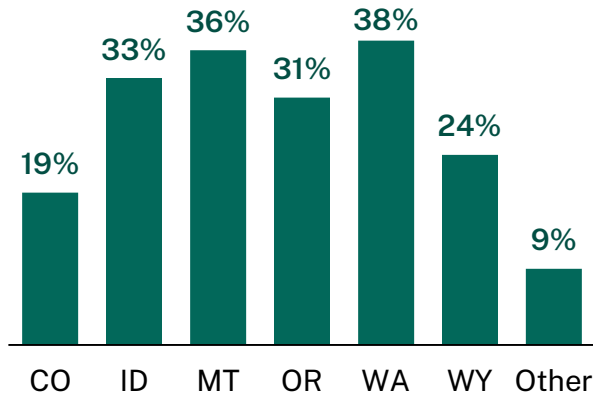


FIGURE 4 | *Percentage of technical assistance provider survey respondents from each state (n=85)*



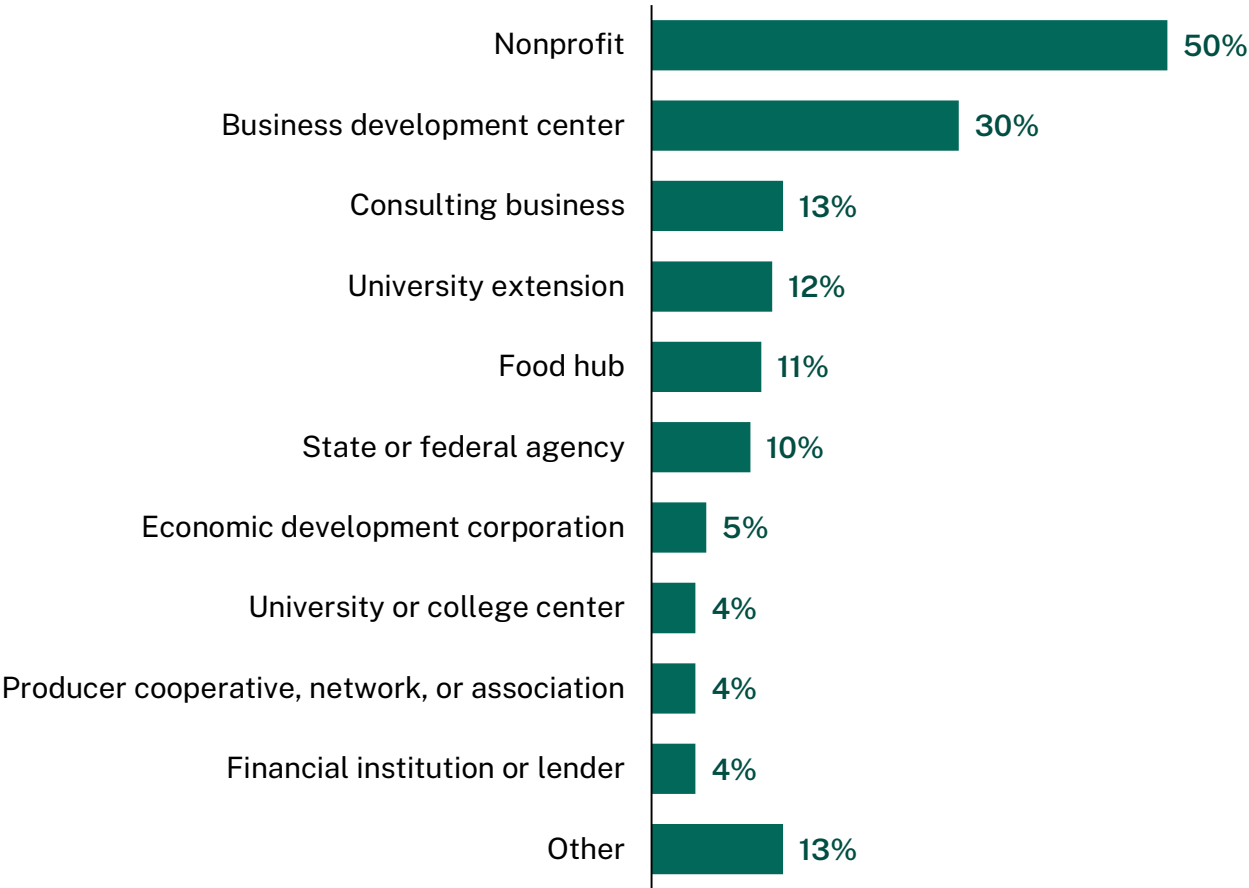
Other states served by survey respondents: Alaska (1), Arizona (3), California (1), Kansas (1), Nebraska (1), New Mexico (4), North Dakota (2), Ohio (1), Oklahoma (1), Texas (1), Nationwide (3).

TABLE 1 | *Type of organization technical assistance provider survey respondents represent. Respondents could select more than one response (n=94)*

Organization	CO	ID	MT	OR	WA	WY
Business development center	3	5	12	5	3	3
Consulting business	5	4	5	5	5	3
Economic development corporation	0	0	4	0	1	0
Financial institution or lender	0	1	1	1	3	1
Food hub	1	2	3	2	2	3
Nonprofit	11	16	13	20	19	9
Producer cooperative, network, or association	1	2	2	2	2	1
State or federal agency	0	1	1	0	2	3
University extension	1	5	1	2	4	3
University or college center	0	1	0	0	0	2
Other	3	3	4	6	5	3

Other responses: aggregation, brokerage firm, conservation district, cooperative development center, CSA food distribution, distributor, economic development district, food system network (2), Native CDFI, producer, food relief services, research and education in wheat, state economic development agency.

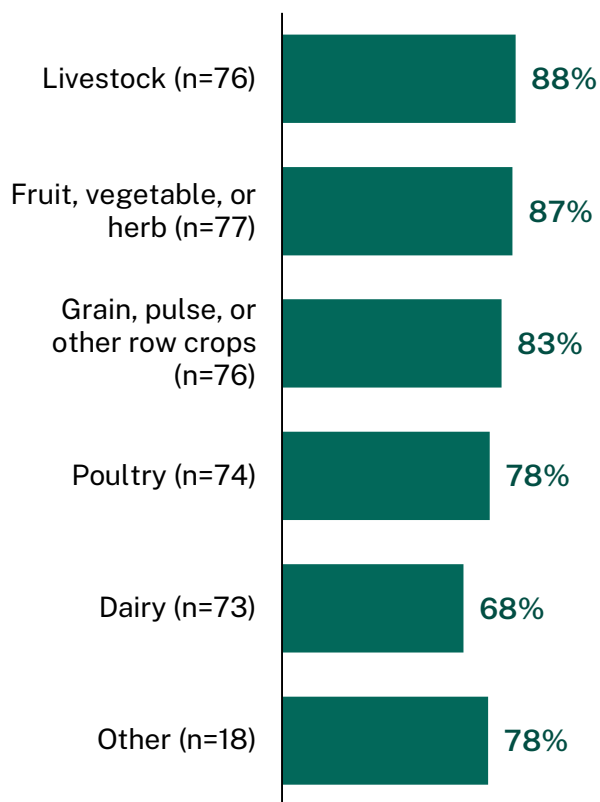
FIGURE 5 | *Type of organizations technical assistance provider survey respondents represent. Respondents could select more than one response (n=94)*



TA providers were asked about the type of farm and food businesses they serve. They could select as many categories as were applicable. Figure 6 summarizes the types of farm clients they serve, and Figure 7 displays the same for types of food businesses. Overall, the results show that TA providers in the region provide services to a wide variety of farms and food businesses, with none of the categories receiving less than 54%.

Survey respondents were asked to provide additional information about their organization, including the number of years it had been in operation (Figure 8), the number of clients served per year (Figure 9), and its number of staff (Figure 10). Sixty-seven percent of survey respondent organizations have been in operation for over 10 years. The number of clients served varied widely. One-quarter of the organizations serve between 100 and 199 clients, and 20% serve 1,000 to 4,999 clients a year. Sixty-three percent of organizations represented in the findings have fewer than 10 staff.

FIGURE 6 | *Types of farms served by technical assistance provider survey respondents. Respondents could select more than one response.*



Other responses: Agritourism, aquaculture, fisherfolk/seafood producers (3), flowers (3), foraged foods, honey/bees (2), hay/alfalfa, hops (2), winegrapes

FIGURE 7 | *Types of food businesses served by technical assistance provider survey respondents. Respondents could select more than one response. (n=80)*

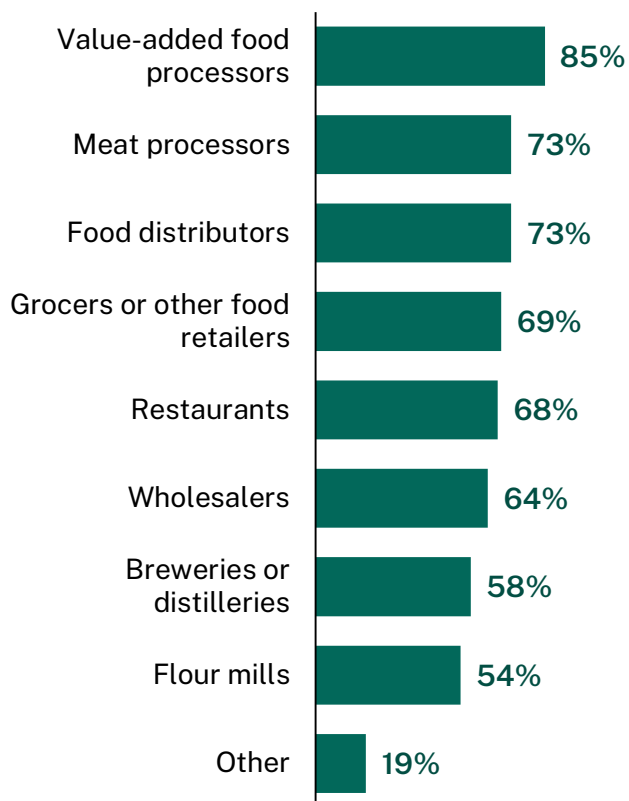


FIGURE 8 | *Number of years technical assistance survey respondent organizations have been in operation (n=70)*

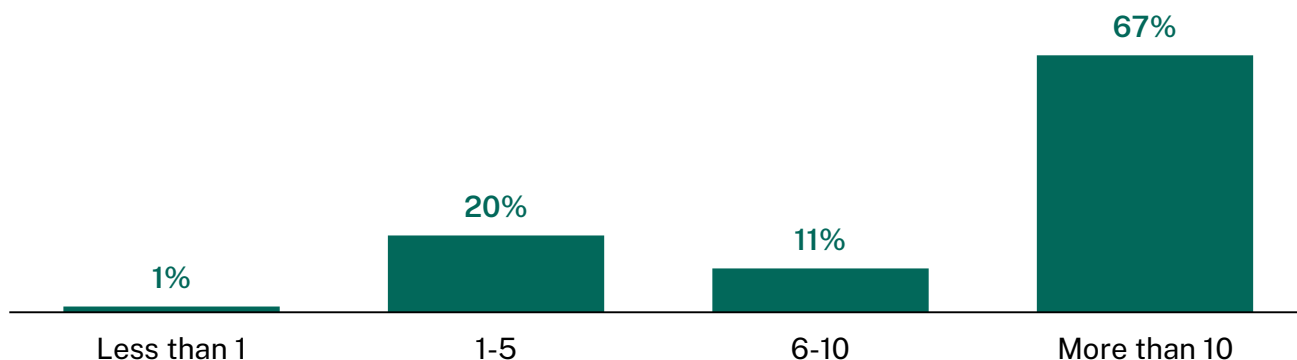


FIGURE 9 | Number of staff that work at technical assistance survey respondent organizations (n=67)

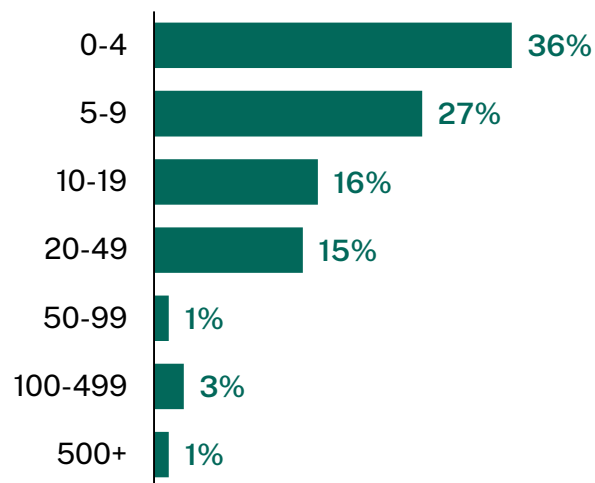
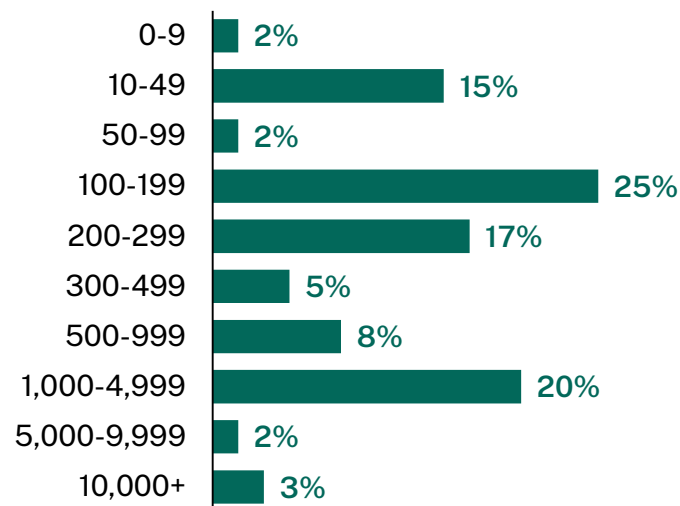


FIGURE 10 | Number of clients served per year by technical assistance survey respondent organizations (n=60)



Survey of farm and value-added food businesses

The results from the in-depth interviews and TA provider survey helped inform development of a web-based survey for farm and value-added food businesses. The purpose of the survey was to gain farm and food business owners' and operators' perspectives on their business development, funding, marketing, infrastructure, supply chain, and market development needs. For the Diverse Markets for Climate Resilient Ag team regional assessment (i.e., this report), the email request asked people to participate if they own or operate a farm, ranch, or a value-added/processed food business that works with grains, pulses, or pseudocereals anywhere in the Center's service area.

From October 10 to November 21, 2024, we used several strategies to recruit farm and food business survey respondents: 1) we asked our TA provider contact list and members of the Center's state and core teams to email the first request to participate to the relevant farm and food businesses in their networks along with a reminder email two weeks later, 2) we emailed a contact list of 30 grain and pulse growers in the region the request to participate directly, 3) we emailed the request to a list of relevant businesses whose contact information was available through the Organic Integrity Database, 4) we asked farm and food businesses who received the request to share the opportunity to participate with others in their networks. The final sample included 157 farm and food businesses. Although 157 farm and food businesses participated in the survey, in this report we only include the results for the 91 respondents who said they have or are interested in starting a business that grows or processes grains, pulses, or pseudocereals. When we refer to farm and food business survey respondents throughout the findings in this report, we are specifically referring to this subset of respondents relevant to the Creating Diverse Markets for Climate Resilient Ag core team. The other respondents are relevant to and included in the Idaho-specific study only.

Survey respondents had the option to take the survey in English or Spanish: three of the 91 respondents included in this report opted to take the survey in Spanish; 88 opted to participate in English. Figures 11 and 12 show the percentage and number of farm and food business survey respondents by state, respectively. The largest numbers of respondents who have or want to start a business that grows or processes grains, pulses, or pseudocereals are in Washington with 29 respondents, followed by Idaho with 25 respondents. Three individuals did not specify their location. Respondents could select as many states as applied to them, as they might operate in multiple states. Additional farm and food business survey respondent characteristics are summarized in the relevant sections of the report by topic area.

FIGURE 11 | Percent of field crop-related farm and food business survey respondents by state (n=88)

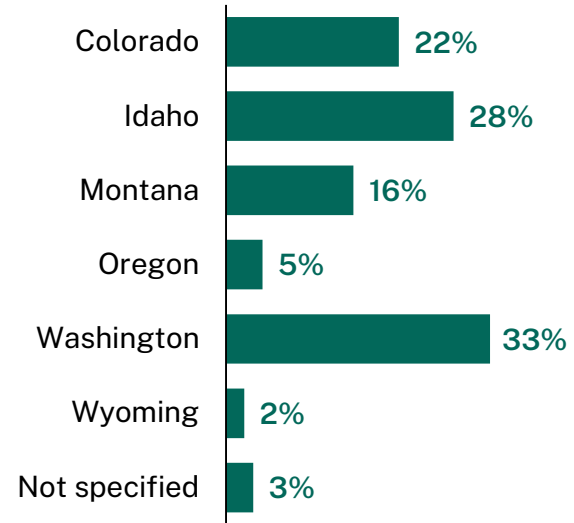
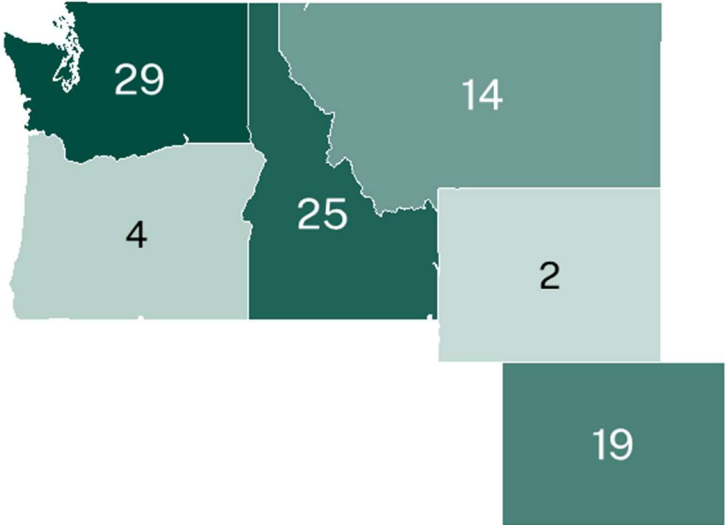


FIGURE 12 | Count of field crop-related farm and food business survey respondents by state (n=88)



Inventory of technical assistance providers

We created an inventory of technical assistance (TA) providers based on our preexisting contact lists, recommendations from key informants, recommendations from the TA survey respondents, and internet searches using key words such as “food business center” or “farm technical assistance” for each state in the service area.

The inventory is available as a separate spreadsheet and includes the name and location of the organization, contact information, service area, priority audiences served, and the NWRM RFBC core areas covered by their programming (i.e., whether they have programming related to building meat supply chain capacity, creating diverse markets for climate-resilient agriculture, connecting and scaling food entrepreneurs, or supporting right-sized investing and infrastructure).

Farm characteristics

Number of farms

There are 162,151 farms in the Center’s service area. Table 2 shows their distribution by state and substate region.

TABLE 2 | *Number and percent of farms in the service area by state and substate region, 2022*

		Number of farms	Percent of farms
	Service area	162,151	100%
Colorado	Total	36,841	23%
	East Central	9,338	6%
	Northeast	8,643	5%
	NW and Mountain	3,560	2%
	San Luis Valley	1,480	1%
	Southeast	4,485	3%
	Southwest	9,335	6%
Idaho	Total	22,877	14%
	East	7,785	5%
	North	4,961	3%
	South Central	3,667	2%
	Southwest	6,464	4%
Montana	Total	24,266	15%
	Central	3,795	2%
	North Central	4,159	3%
	Northeast	3,060	2%
	Northwest	5,362	3%
	South Central	3,564	2%
	Southeast	1,844	1%
	Southwest	2,482	2%
Oregon	Total	35,547	22%
	North Central	1,624	1%
	Northeast	3,578	2%
	Northwest	19,246	12%
	Southeast	5,575	3%
	Southwest	5,524	3%
Washington	Total	32,076	20%
	Central	7,023	4%
	East Central	3,884	2%
	Northeast	3,682	2%
	Southeast	2,474	2%
	Western	15,013	9%
Wyoming	Total	10,544	7%
	Northeast	2,508	2%
	Northwest	2,778	2%
	South Central	1,258	1%
	Southeast	2,619	2%
	West	1,381	1%

Farm size by gross cash farm income and total value of products

USDA NASS categorizes farms into family farms and non-family farms. To be considered a family farm, a farmer household or extended family must own more than 50% of the operation. Family farm size is categorized by gross cash farm income (GCFI), which includes crop and livestock sales, fees for delivering commodities under production contracts, government payments, and farm-related income. Small family farms have a GCFI below \$350,000, midsize family farms have a GCFI of \$350,000 to \$999,999, and large family farms have a GCFI of \$1,000,000 or more.

Fifty-four percent of farms in the Center’s service area are small family farms operating less than 50 acres and 90% have a gross cash farm income (GCFI) less than \$150,000.

Twenty percent of farms are larger than 500 acres and 10% have a GCFI more than \$350,000.

Of the 162,124 farms in the service area, 151,499 are family farms and 10,625 non-family farms. Most family farms in the service area are small. Small family farms account for 90% of the 151,499 family farms, and 93% of small family farms have a GCFI less than \$150,000 (Table 3). Midsize family farms account for 6% of family farms. Small and midsize family farms account for 95% to 97% of all family farms in all the states.

TABLE 3 | Number and percent of family farms by gross cash farm income (GCFI) and state, 2022

	Less than \$150,000		\$150,000 to \$349,999		\$350,000 to \$999,999		\$1,000,000 to \$4,999,999		\$5,000,000 or more	
	Count	%	Count	%	Count	%	Count	%	Count	%
Service area	127,542	84%	9,212	6%	8,970	6%	4,791	3%	984	0.6%
Colorado	29,341	87%	1,775	5%	1,543	5%	734	2%	150	0.4%
Idaho	17,963	83%	1,235	6%	1,207	6%	875	4%	290	1%
Montana	16,831	75%	2,303	10%	2,457	11%	883	4%	61	0.3%
Oregon	29,998	88%	1,519	4%	1,438	4%	867	3%	147	0.4%
Washington	25,529	85%	1,433	5%	1,593	5%	1,172	4%	313	1%
Wyoming	7,880	80%	947	10%	732	7%	260	3%	23	0.2%

As of the writing of this report, GCFI data is only available at the state and national level; however, finer scale data will be released in January 2026. At the substate scale, the total value of products (TVP) is the most-similar data currently available, representing the value of products sold plus government payments, including from the Conservation Reserve Program (CRP), Wetlands Reserve Program (WRP), Farmable Wetlands Program (FWP), Conservation Reserve Enhancement Program (CREP), and others.

For reference, tables 4 and 5 compare the percentage of small and midsize family farms by GCFI to the percentage of farms by the closest TVP categories.

TABLE 4 | *Nearest gross cash farm income (GCFI) small family farm definition proxy in total value of products (TVP) sold, 2022*

	TVP below \$250,000	GFCI below \$350,000
Service area	88%	90%
Colorado	91%	93%
Idaho	86%	89%
Montana	82%	85%
Oregon	91%	93%
Washington	87%	90%
Wyoming	87%	90%

TABLE 5 | *Nearest gross cash farm income (GCFI) midsize family farm definition proxy in total value of products (TVP) sold, 2022*

	TVP below \$500,000	GFCI below \$1,000,000
Service area	93%	96%
Colorado	95%	97%
Idaho	91%	95%
Montana	91%	96%
Oregon	94%	97%
Washington	90%	95%
Wyoming	94%	97%

In the service area, 76% of the 162,151 farms have a TVP below \$50,000 (Tables 6 and 7). Oregon has the highest number (28,930) and percentage (81%) of farms with a TVP below \$50,000.

Listed below are the substate regions with the highest number of farms with a TVP below \$50,000:

- Colorado's Southwest region
- Idaho's East region
- Montana's South Central region
- Oregon's Northwest region
- Washington's Western region
- Wyoming's Northwest region

TABLE 6 | *Percent of farms by total value of products sold in the service area by state, 2022*

	Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$249,999	\$250,000 to \$499,999	\$500,000 or more
Service area	76%	6%	6%	5%	7%
Colorado	80%	5%	5%	4%	5%
Idaho	75%	5%	6%	5%	9%
Montana	64%	8%	10%	8%	9%
Oregon	81%	5%	5%	3%	6%
Washington	78%	4%	5%	4%	10%
Wyoming	69%	8%	11%	7%	6%

TABLE 7 | Number of farms by total value of products (TVP) sold in the service area by state and substate region, 2022

		Less than \$50,000	\$50,000 to \$99,999	\$100,000 to \$249,999	\$250,000 to \$499,999	\$500,000 or more
Colorado	Service area	123,297	8,987	10,250	7,588	12,029
	Colorado total	29,651	1,955	2,003	1,396	1,836
	East Central	7,281	445	522	415	675
	Northeast	6,777	483	453	400	530
	NW and Mountain	2,948	196	191	120	105
	San Luis Valley	977	99	141	104	159
	Southeast	3,526	268	293	182	216
	Southwest	8,142	464	403	175	151
Idaho	Idaho total	17,097	1,220	1,392	1,079	2,089
	East	5,604	452	565	430	734
	North	4,205	163	196	142	255
	South Central	2,117	273	335	274	668
	Southwest	5,171	332	296	233	432
Montana	Montana total	15,487	1,913	2,517	2,048	2,301
	Central	2,380	327	429	317	342
	North Central	1,953	383	569	582	672
	Northeast	1,484	298	329	403	546
	Northwest	4,506	316	304	132	104
	South Central	2,510	246	367	206	235
	Southeast	860	167	329	274	214
	Southwest	1,794	176	190	134	188
Oregon	Oregon total	28,930	1,714	1,693	1,146	2,064
	North Central	994	115	122	109	284
	Northeast	2,701	209	238	196	234
	Northwest	16,204	795	735	483	1,029
	Southeast	4,139	349	407	258	422
	Southwest	4,892	246	191	100	95
Washington	Washington total	24,904	1,362	1,528	1,212	3,070
	Central	4,995	368	494	364	802
	East Central	1,911	193	336	335	1,109
	Northeast	3,270	123	116	51	122
	Southeast	1,533	169	133	169	470
	Western	13,195	509	449	293	567
Wyoming	Wyoming total	7,228	823	1,117	707	669
	Northeast	1,691	190	328	176	123
	Northwest	1,971	201	274	153	179
	South Central	832	108	109	103	106
	Southeast	1,689	233	308	209	180
	West	1,045	91	98	66	81

Farm size by acreage

In 2022, 162,124 farms in the service area had acreage in production (Table 8). About half (83,875) of farms had less than 50 acres in production, and the remaining 78,249 had 50 or more acres in production.

TABLE 8 | *Number of farms by acreage in production, 2022*

		Acres						
		1 to 9	10 to 49	50 to 139	140 to 259	260 to 499	500 to 999	1,000 or more
Colorado	Service area	34,056	49,819	22,023	13,346	10,714	9,490	22,676
	Colorado total	5,286	10,900	5,819	3,844	3,093	2,771	5,101
	East Central	669	2,705	1,404	895	841	817	2,007
	Northeast	1,621	2,565	1,391	880	701	565	893
	NW and Mountain	315	1,079	642	452	286	272	514
	San Luis Valley	105	280	303	242	171	167	212
	Southeast	471	779	621	583	538	514	979
	Southwest	2,105	3,492	1,458	792	556	436	496
Idaho	Idaho total	5,785	6,977	2,974	1,876	1,566	1,384	2,315
	East	1,767	2,020	969	798	633	611	987
	North	631	1,880	938	451	341	293	427
	South Central	906	938	460	286	323	257	497
	Southwest	2,481	2,139	607	341	269	223	404
Montana	Montana total	1,706	5,366	2,813	2,360	2,222	2,008	7,791
	Central	235	803	473	369	282	301	1,332
	North Central	89	311	331	395	452	426	2,155
	Northeast	32	199	240	276	393	390	1,530
	Northwest	840	2,243	829	514	328	248	360
	South Central	240	910	496	358	410	302	848
	Southeast	66	138	120	151	140	154	1,075
	Southwest	204	762	324	297	217	187	491
Oregon	Oregon total	11,327	12,502	4,559	2,205	1,572	1,190	2,192
	North Central	330	312	179	151	102	111	439
	Northeast	917	914	389	354	213	243	548
	Northwest	7,366	7,520	2,329	817	577	337	300
	Southeast	1,164	1,648	754	492	398	336	783
Washington	Southwest	1,550	2,108	908	391	282	163	122
	Washington total	9,140	11,700	4,215	2,019	1,374	1,255	2,373
	Central	2,294	2,375	922	435	320	251	426
	East Central	535	542	454	470	421	477	985
	Northeast	519	1,589	698	324	188	142	222
Wyoming	Southeast	345	552	326	213	180	230	628
	Western	5,447	6,642	1,815	577	265	155	112
	Wyoming total	812	2,374	1,643	1,042	887	882	2,904
	Northeast	122	512	359	202	209	187	917
	Northwest	282	842	514	293	204	211	432
	South Central	104	203	180	130	97	108	436
	Southeast	131	383	354	307	280	288	876
	West	173	434	236	110	97	88	243

As shown in Table 9, 52% of farms in the six-state region have less than 50 acres in production. Oregon (67%) and Washington (64%) have the highest percentage of farms with less than 50 acres in production. Montana (32%) and Wyoming (28%) have the highest percentage of farms with 1,000 acres or more in production.

TABLE 9 | Percent of farms by farm size (acres) and state, 2022

	Acres						
	1 to 9	10 to 49	50 to 139	140 to 259	260 to 499	500 to 999	1,000 or more
Service area	21%	31%	14%	8%	7%	6%	14%
Colorado	14%	30%	16%	10%	8%	8%	14%
Idaho	25%	30%	13%	8%	7%	6%	10%
Montana	7%	22%	12%	10%	9%	8%	32%
Oregon	32%	35%	13%	6%	4%	3%	6%
Washington	28%	36%	13%	6%	4%	4%	7%
Wyoming	8%	23%	16%	10%	8%	8%	28%

Farms that sell processed or value-added products

Value-added products are defined by the USDA as commodities that are transformed into products worth more than the originally produced commodity through further manufacture or processing. Table 10 shows the number and percentage of farms in the service area that sell value-added products and their respective value-added sales. Three percent of farms in the region sell value-added products. The Western region of Washington has the highest number of farms that sell value-added products. Oregon accounts for 52% and Washington accounts for 37% of all value-added product sales in the service area.

TABLE 10 | *Count, percentage, and sales of farms that sell processed or value-added agricultural products, 2022*

		Count	Percent	Sales
Colorado	Service area	4,828	3%	\$478,142,000
	Colorado total	893	2%	\$20,870,000
	East Central	175	2%	\$2,388,000
	Northeast	258	3%	\$4,781,000
	NW and Mountain	125	4%	\$2,688,000
	San Luis Valley	24	2%	\$397,000
	Southeast	54	1%	\$1,103,000
	Southwest	257	3%	\$9,513,000
Idaho	Idaho total	432	2%	\$13,059,000
	East	86	1%	\$780,000
	North	138	3%	\$1,348,000
	South Central	40	1%	\$4,686,000
	Southwest	168	3%	\$6,245,000
Montana	Montana total	375	2%	\$14,696,000
	Central	51	1%	\$2,071,000
	North Central	32	1%	\$749,000
	Northeast	19	1%	\$37,000
	Northwest	174	3%	\$9,130,000
	South Central	42	1%	\$1,560,000
	Southeast	15	1%	\$363,000
	Southwest	42	2%	\$786,000
Oregon	Oregon total	1,578	4%	\$248,509,000
	North Central	36	2%	\$3,565,000
	Northeast	74	2%	\$5,899,000
	Northwest	1,006	5%	\$153,692,000
	Southeast	140	3%	\$2,189,000
	Southwest	322	6%	\$83,164,000
Washington	Washington total	1,350	4%	\$178,912,000
	Central	207	3%	\$69,172,000
	East Central	30	1%	\$830,000
	Northeast	146	4%	\$1,771,000
	Southeast	57	2%	\$27,976,000
	Western	910	6%	\$79,163,000
Wyoming	Wyoming total	200	2%	\$2,096,000
	Northeast	49	2%	\$355,000
	Northwest	73	3%	\$1,102,000
	South Central	23	2%	\$351,000
	Southeast	34	1%	\$201,000
	West	21	2%	\$87,000

Enterprises farm and food business survey respondents have and want to start

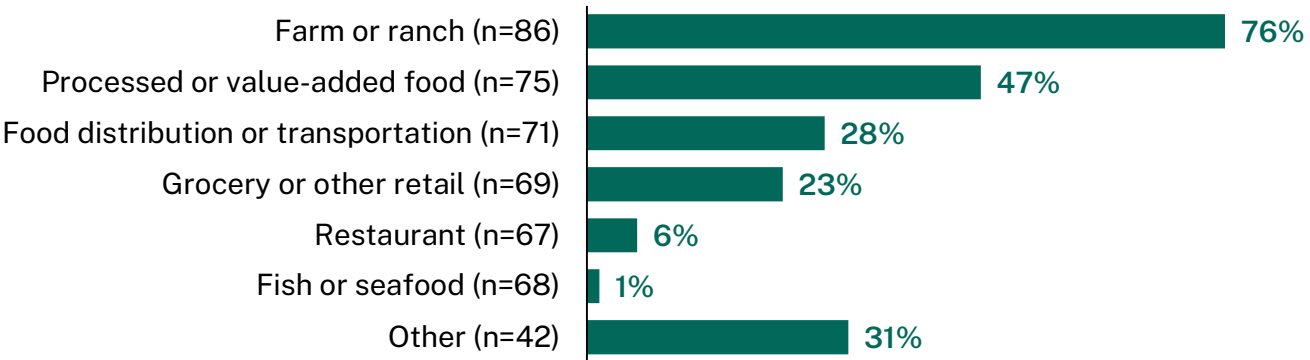
Figure 13 shows the percentage of respondents that operate the types of farm and food businesses we asked about in the survey. Respondents could select all categories that apply to them. The most common response was farm and ranch (76%), and just under half have a processed or value-added food business (47%).

Respondents who indicated they have a farm or ranch were asked what they currently produce (Figure 14). Eighty percent of those with a farm or ranch said they currently produce field crops, which is unsurprising as we are summarizing results for those who said they currently have or are interested in starting a business that grows or processes grains, pulses, or pseudocereals. Of the subset of farm and food business survey respondents who currently have a farm or ranch:

- 20 (31%) currently only produce field crops,
- 32 (49%) currently produce field crops and at least one other crop or animal, and
- 13 (20%) do not currently grow field crops at all (n=65).

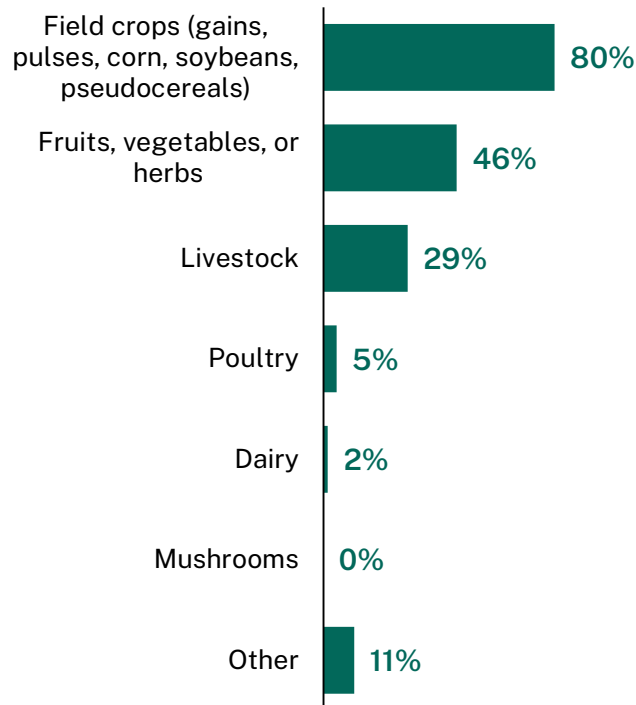
Many of those who have or are interested in starting a business that grows or processes row crops like grains, pulses, or pseudocereals also have or are interested in starting other types of farm and food ventures. For example, 46% of those who have or are interested in starting a field crop-related enterprise currently produce fruits, vegetables, or herbs and 29% of them currently raise livestock (Figure 14). Figure 15 shows the type of value-added food products respondents are currently making. Respondents had the opportunity to list the processed or value-added products they currently make, if applicable. Their responses are provided in Table 11.

FIGURE 13 | *Type of business(es) currently operated by survey respondents who have or are interested in starting a business that grows or processes grains, pulses, or pseudocereals. They could select all that applied to them.*



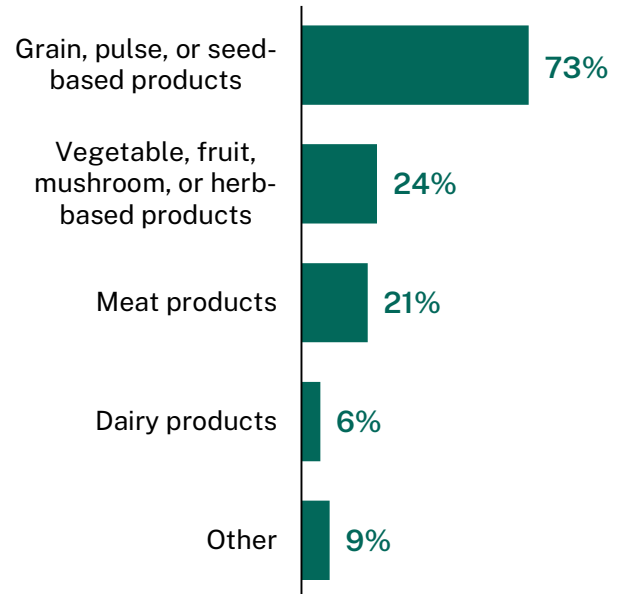
Other responses: Orchard fruits, cheese, cleaning devices for spices, coops, CSA, food banks, cottage bakery, direct to consumer market, direct to consumer butcher lambs, farm stand (2), farmers market manager, fee for service slaughter and processing, food hub, grain elevator, honey, chocolate, nonprofit farm to food bank/school, plant research, post-harvest grain processor, coffee roaster, rural agriculture research and health, sprouts, wholesaler.

FIGURE 14 | What respondents who have or are interested in starting a business that grows or processes grains, pulses, or pseudocereals currently produce (n=65). They selected all that applied.



Other responses: Alfalfa, cut flowers (4), dye plants, eggs (2), hay/haylage/straw (2), garden starts, honey (2), seed potatoes, sprouts, trout/sturgeon/caviar, vegetable/herb/flower seeds, wine (2).

FIGURE 15 | Type of **value-added foods** respondents who have or are interested in starting a business that grows or processes grains, pulses, or pseudocereals currently produce (n=33). They selected all that applied.



Other responses: Hard apple cider, mead, cider, cocktail bitters and syrups, coffee, confections, eggs, garlic braids and tinctures, black garlic, honey, livestock feed, pastries, pet treats, restaurant and brewery, olive oil and vinegar.

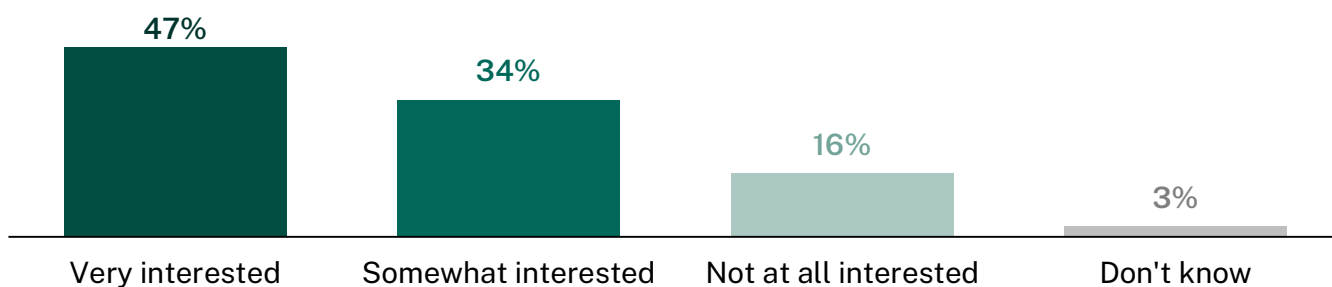
TABLE 11 | Primary processed or value-added food products made by farm and food survey respondents (unedited responses) (n=24)

Product
Animal feed
Black Garlic Products
Cleaned and bagged grains, pulse and oilseed crops; flour
Flour with one of our specialty grains and frozen meat for individual sale.
Flours, rolled oats, and whole grain berries for the homeowner to process themselves
Freezer Beef USDA
Hard apple cider
Hard Cider, Mead, Hummus, Pesto, Carrot Habanero Hot Sauce, Walnut Butter, Energy Bars
Legumes and grains

Product
Lightly processed fruits and vegetables for wholesale markets. Starting with retail packaging
Malted grain for brewers and distillers currently; for millers, bakers, and confectionery in the future.
Packaged blueberries, wine
Pasta, pizza, oil, vinegar, seasoning
Portuguese custard tarts
Rolled oats, flour
Snack food from pulse crops and grain
Stone milled organic flour and baked goods
Tempeh, tempeh hummus, tempeh salads. Tempeh is a bean-based protein. We currently use black-eyed peas and yellow split peas but are transitioning to pardina lentils, millet and hopefully more WA grown pulses.
Tortillas
We make a healthy, tasty Kamut wheat snack
We sell value added cuts of meat. We are currently adding meat boxes with recipes.
Whole and 1/2 live butcher lambs directly to the consumer
Whole grain flour

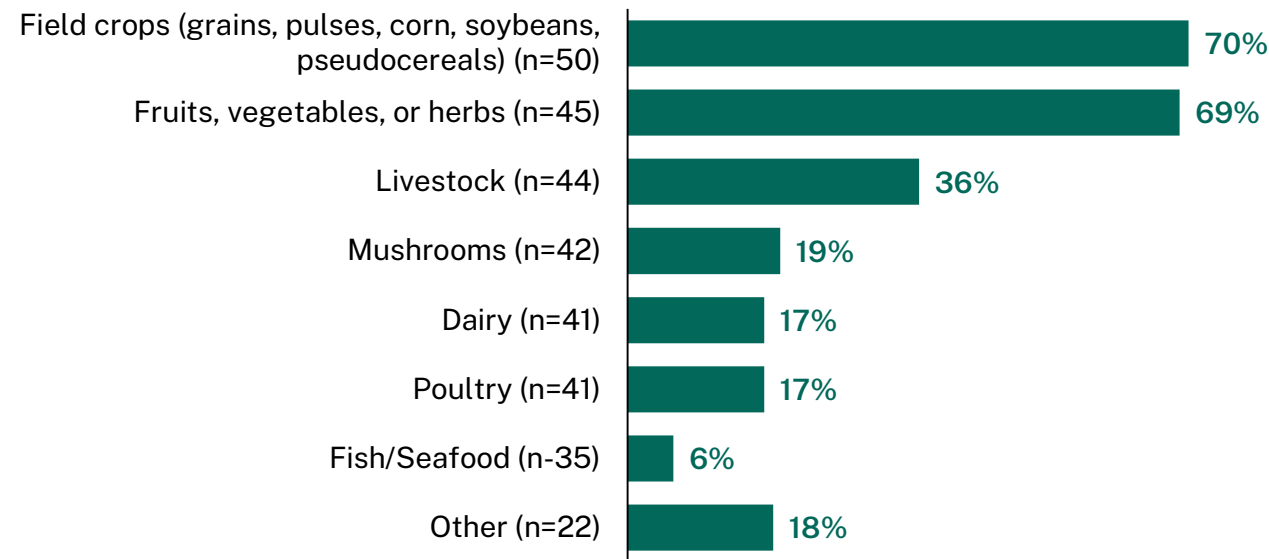
Respondents who are not already making processed or value-added products were asked, “How interested are you, if at all, in making a processed or value-added food product to sell?” Eighty-one percent are either “very interested” (47%) or “somewhat interested” (34%) (n=38) (Figure 16).

FIGURE 16 | *Of those who do not already, farm and food business survey respondents’ level of interest in making processed or value-added products to sell (n=38)*



Survey participants who said they do not currently have a farm or food business were asked if they are interested in starting one. Thirty-five respondents (70%) who do not already are interested in starting a business that grows or makes value-added products from field crops (Figure 17). A large proportion (69%) of respondents are also interested in starting a business that grows or processes fruits, vegetables, or herbs.

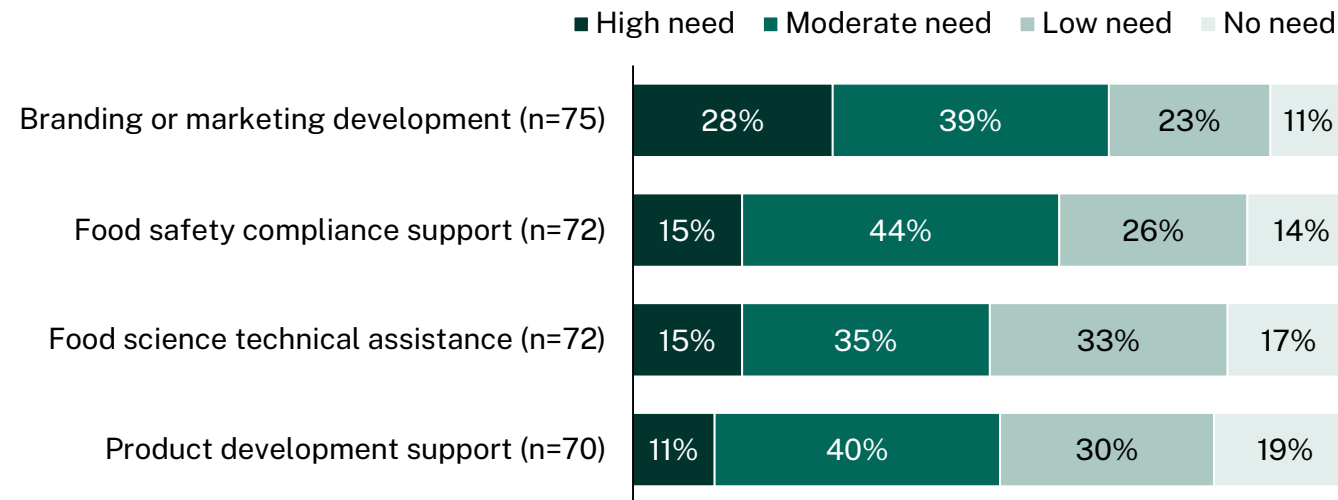
FIGURE 17 | *Percent of farm and food business survey respondents interested in starting a business that grows select foods or makes value-added products from them (respondents could select all that applied and those who answered ‘not applicable’ are not included)*



TA farm and food businesses need related to value-added products

The survey asked farm and food business respondents to indicate the extent, if at all, they need select types of technical assistance relevant to value-added products (Figure 18). The majority said they have high or moderate need for all the types of support presented; however, the highest need for the largest percentage is branding or marketing development support.

FIGURE 18 | *Value-added technical assistance needs of farm and food business survey respondents that grow or process grains, pulses, and other field crops*



Supports TA providers currently offer related to value-added products

Technical assistance survey respondents are offering supports relevant to businesses that have or want to start selling value-added products:

- 56% provide value-added processing support (n=75),
- 49% offer food safety compliance or advising (n=76),
- 43% support product development (n=76), and
- 16% provide food science technical assistance (n=73).

Production characteristics: Field crops grown

Farms producing common grains

Tables 12 and 13 summarize the distribution of farms and acres of commonly grown grains in the service area: barley, corn (for grain), oats, durum wheat, spring wheat, and winter wheat.

In the service area, the most grown grain is winter wheat, followed by spring wheat, barley, corn (for grain), durum wheat, and oats (Table 13). Forty-two percent of farms in the service area produce winter wheat. Below is a list of the most grown grain type grown at farms, followed by a second if the number was relatively high.

- **Colorado:** Winter wheat is the most common grain, followed by corn (for grain). The majority of both are grown in the East Central region.
- **Idaho:** Winter wheat is the most common grain grown, followed by barley. The majority of winter wheat is grown in the North and East regions, and the majority of barley is grown in the East region.
- **Montana:** The two most common grains grown are spring and winter wheat. Most spring wheat is grown in the North Central and Northeast regions. The majority of winter wheat is grown in the North Central region.
- **Oregon:** The most grown grain is winter wheat. The majority of winter wheat is grown in the North Central and Northeast regions.
- **Washington:** The most grown grain is winter wheat. The majority of winter wheat is grown in the East Central and Southeast regions.
- **Wyoming:** The most grown grains are barley and corn (for grain). The majority of barley is grown in the Northwest region. The majority of corn (for grain) is grown in the Southeast region.

9,993 farms produce winter wheat.

4,356 farms produce spring wheat; 50% are in Montana (2,250,252 acres).

3,904 farms produce barley; 39% are in Montana (797,149 acres) and 34% in Idaho (538,504 acres).

3,759 farms produce corn; 48% are in Colorado (1,026,245 acres).

706 farms produce Durum wheat; 92% are in Montana (635,317 acres).

618 farms produce oats; 30% are in Montana (19,778).

Figures 19 through 24 map the number of farms by common grains grown in the service area on a county scale.

TABLE 12 | Number of farms and acres operated that produce common grains by state and substate region, 2022

		Barley		Corn (for grain)		Oats		Wheat, Durum		Wheat, Spring		Wheat, Winter	
		Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres
	Service area	3,904	1,519,814	3,759	1,416,861	618	47,326	706	639,199	4,536	3,061,284	9,993	6,868,527
Colorado	Colorado total	208	43,739	1,814	1,026,245	69	3,273	9	(D)	69	5,250	2,172	1,256,736
	East Central	7	182	893	711,652	9	72	*	*	9	50	1,294	933,880
	Northeast	63	5,753	574	233,776	11	863	*	*	20	1,213	558	235,960
	NW and Mountain	2	(D)	5	(D)	2	(D)	*	*	*	*	9	5,109
	San Luis Valley	118	37,606	2	(D)	24	1,994	5	(D)	24	1,875	15	1,132
	Southeast	5	(D)	232	71,130	5	(D)	3	(D)	2	(D)	191	75,835
	Southwest	13	198	108	9,687	18	344	1	(D)	14	2,112	105	4,820
Idaho	Idaho total	1,322	538,504	648	121,339	115	8,776	50	3,882	918	312,177	1,706	732,586
	East	657	344,207	73	12,702	21	2,217	32	3,808	462	231,582	500	273,025
	North	146	26,880	4	(D)	57	4,037	2	(D)	191	41,703	469	313,497
	South Central	463	162,588	211	47,516	23	1,284	6	(D)	156	30,677	343	79,475
	Southwest	56	4,829	360	61,121	14	1,238	10	74	109	8,215	394	66,589
Montana	Montana total	1,512	797,149	319	65,897	187	19,778	647	635,317	2,260	2,250,252	2,457	2,237,353
	Central	231	132,832	21	4,296	32	4,914	19	2,521	194	90,011	367	357,802
	North Central	676	489,296	36	12,944	42	3,452	211	121,495	1,043	925,060	1,314	1,371,889
	Northeast	200	68,934	71	20,909	54	8,121	397	505,665	722	1,140,050	315	270,732
	Northwest	49	6,052	23	2,269	12	501	2	(D)	55	7,503	78	11,830
	South Central	193	54,106	93	14,833	19	1,012	3	680	71	23,465	193	164,445
	Southeast	44	13,801	60	9,219	11	707	12	4,956	95	60,818	98	33,140
	Southwest	119	32,128	15	1,427	17	1,071	3	(D)	80	3,345	92	27,515
Oregon	Oregon total	141	17,986	224	45,670	103	7,847	*	*	289	40,296	1,182	695,449
	North Central	29	6,241	17	20,904	1	(D)	*	*	45	15,065	262	361,914
	Northeast	49	5,649	53	11,115	8	180	*	*	78	12,779	372	260,269
	Northwest	24	764	40	354	80	5,252	*	*	106	6,253	385	35,114
	Southeast	35	5,202	99	13,248	14	2,415	*	*	60	6,199	157	37,340
	Southwest	4	130	15	49	*	*	*	*	*	*	6	812
Washington	Washington total	400	62,056	415	102,210	58	2,525	*	*	975	451,815	2,261	1,922,251
	Central	24	2,830	84	39,883	9	28	*	*	64	48,126	186	184,305
	East Central	67	8,381	237	55,783	9	395	*	*	325	144,227	928	916,113
	Northeast	80	10,605	2	(D)	17	1,061	*	*	150	54,097	227	108,534
	Southeast	159	33,508	64	6,482	8	961	*	*	395	203,520	878	710,708
	Western	70	6,732	28	62	15	80	*	*	41	1,845	42	2,591
Wyoming	Wyoming total	321	60,380	339	55,500	86	5,127	*	*	25	1,494	215	24,152
	Northeast	18	2,315	7	60	15	1,089	*	*	7	(D)	24	(D)
	Northwest	217	44,334	135	17,230	42	1,885	*	*	9	732	17	1,571
	South Central	13	1,469	6	638	1	(D)	*	*	*	*	1	(D)
	Southeast	30	6,585	188	37,572	25	2,153	*	*	6	642	172	22,581
	West	43	5,677	3	(D)	3	(D)	*	*	3	120	1	(D)

TABLE 12 | Number (and percent) of farms that grow common grains by type and state, 2022. For example, 92% of the service area’s 706 farms that grow durum wheat are in Montana.

	Barley	Corn (for grain)	Oats	Durum wheat	Spring wheat	Winter wheat
Service area	3,904 (100%)	3,759 (100%)	618 (100%)	706 (100%)	4,536 (100%)	9,993 (100%)
Colorado	208 (5%)	1,814 (48%)	69 (11%)	9 (1%)	69 (2%)	2,172 (22%)
Idaho	1,322 (34%)	648 (17%)	115 (19%)	50 (7%)	918 (20%)	1,706 (17%)
Montana	1,512 (39%)	319 (8%)	187 (30%)	647 (92%)	2,260 (50%)	2,457 (25%)
Oregon	141 (4%)	224 (6%)	103 (17%)	*	289 (6%)	1,182 (12%)
Washington	400 (10%)	415 (11%)	58 (9%)	*	975 (21%)	2,261 (23%)
Wyoming	321 (8%)	339 (9%)	86 (14%)	*	25 (0.6%)	215 (2%)

FIGURE 19 | Number of farms producing barley in the service area by county, 2022

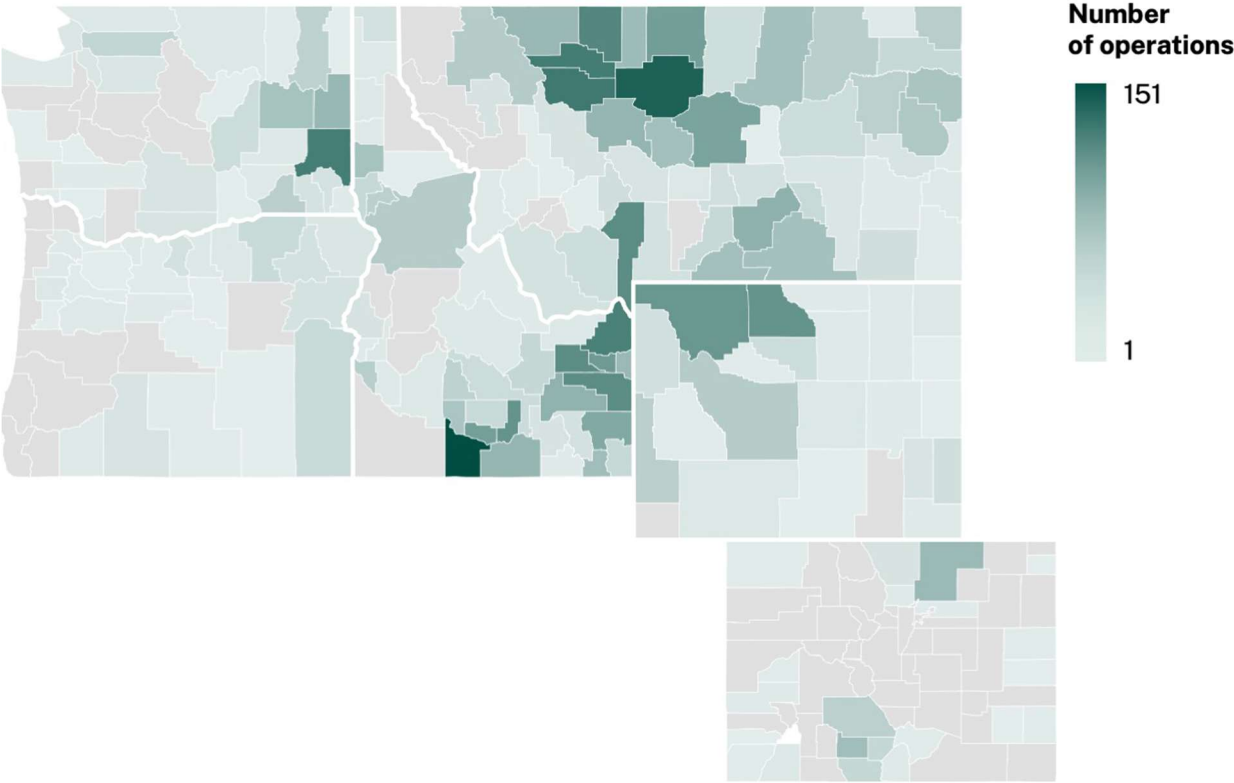


FIGURE 20 | *Number of farms producing corn for grain in the service area by county, 2022*

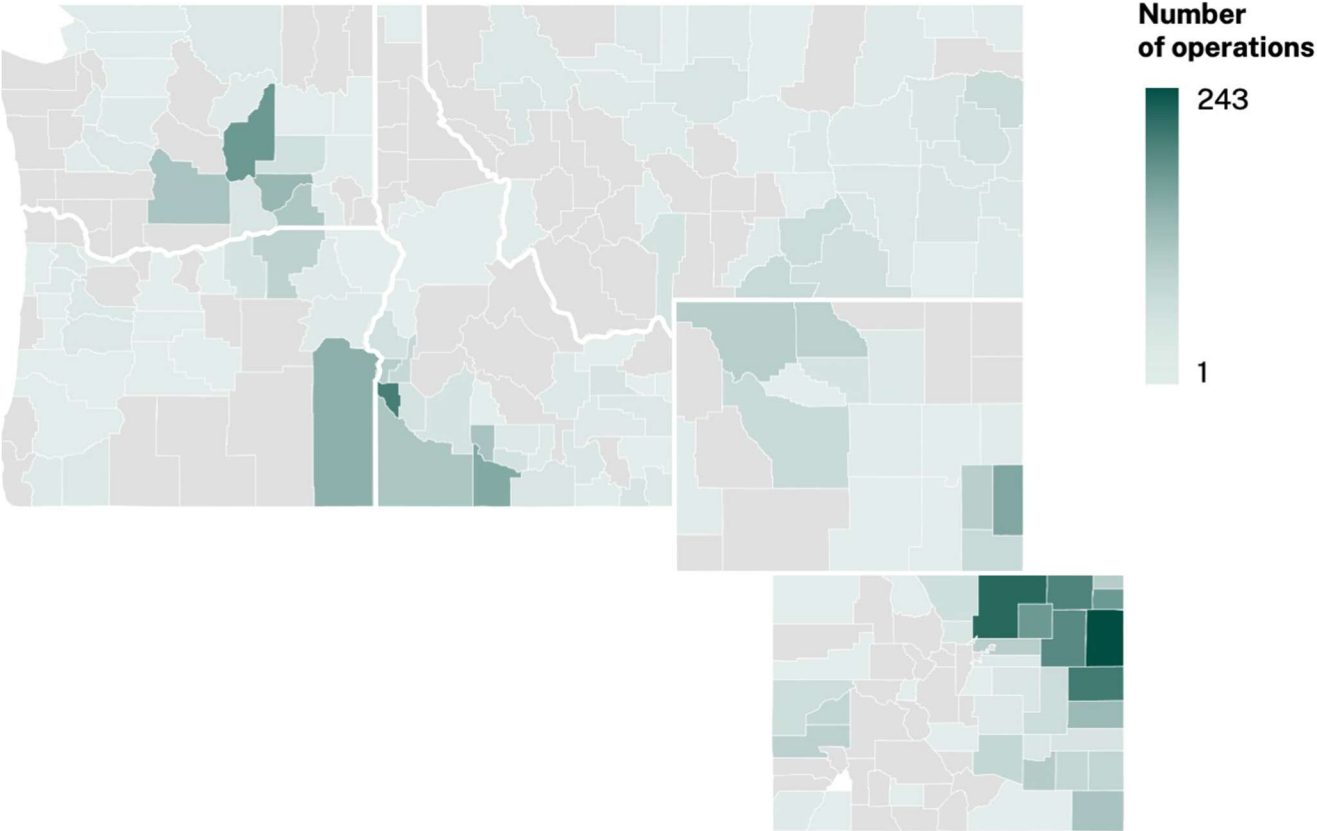


FIGURE 21 | *Number of farms producing oats in the service area by county, 2022*

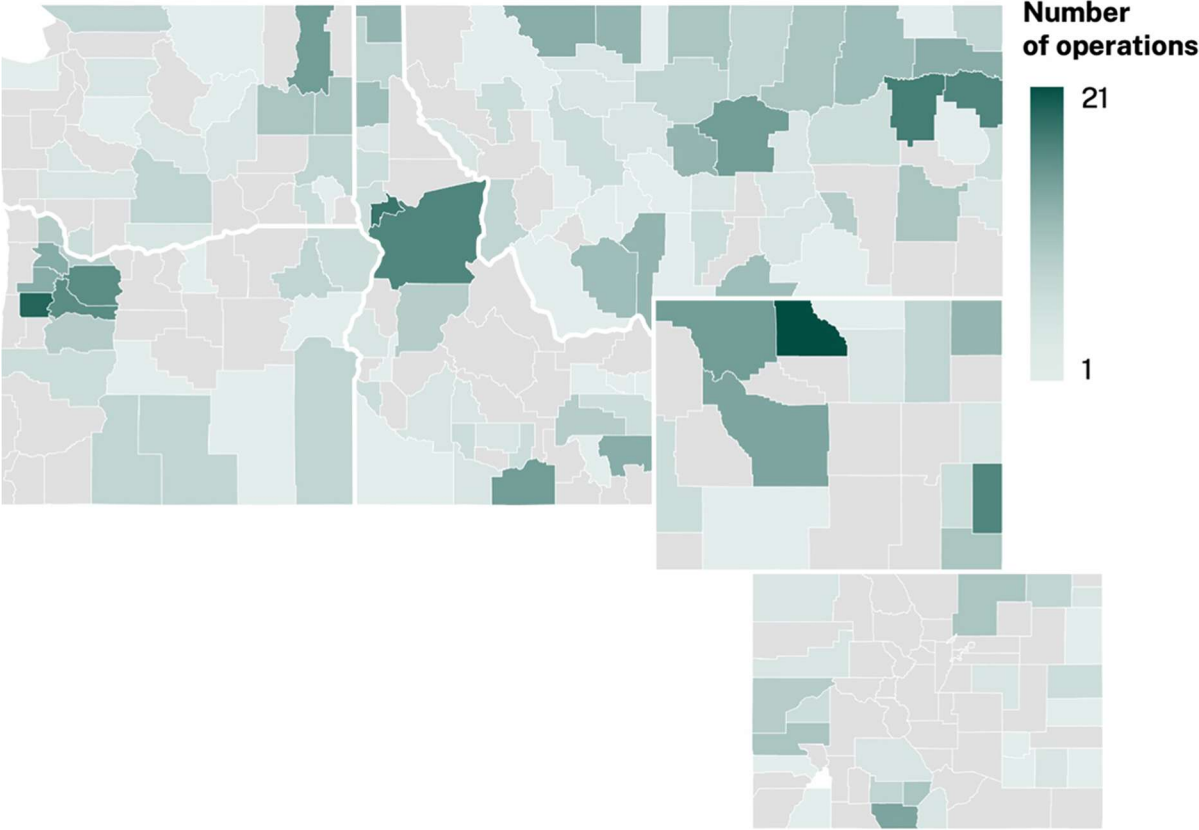


FIGURE 22 | *Number of farms producing durum wheat in the service area by county, 2022*

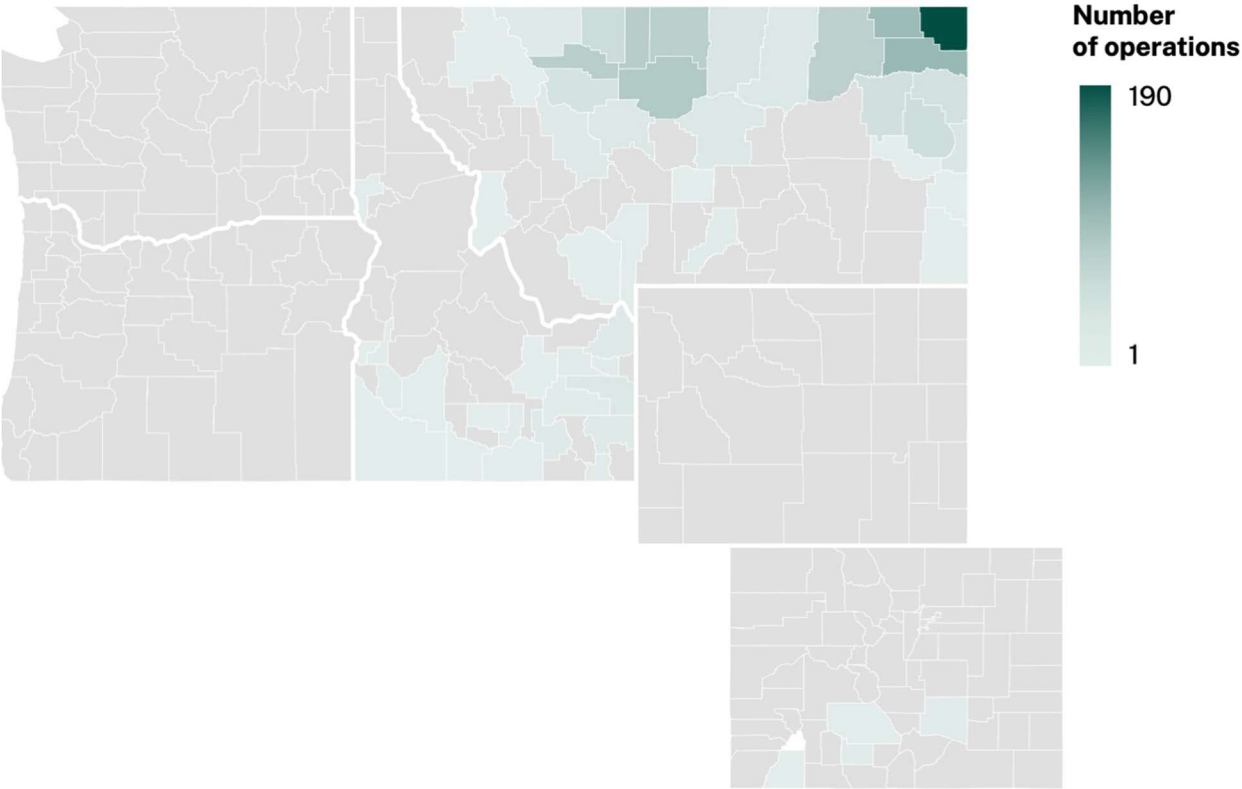


FIGURE 23 | *Number of farms producing spring wheat in the service area by county, 2022*

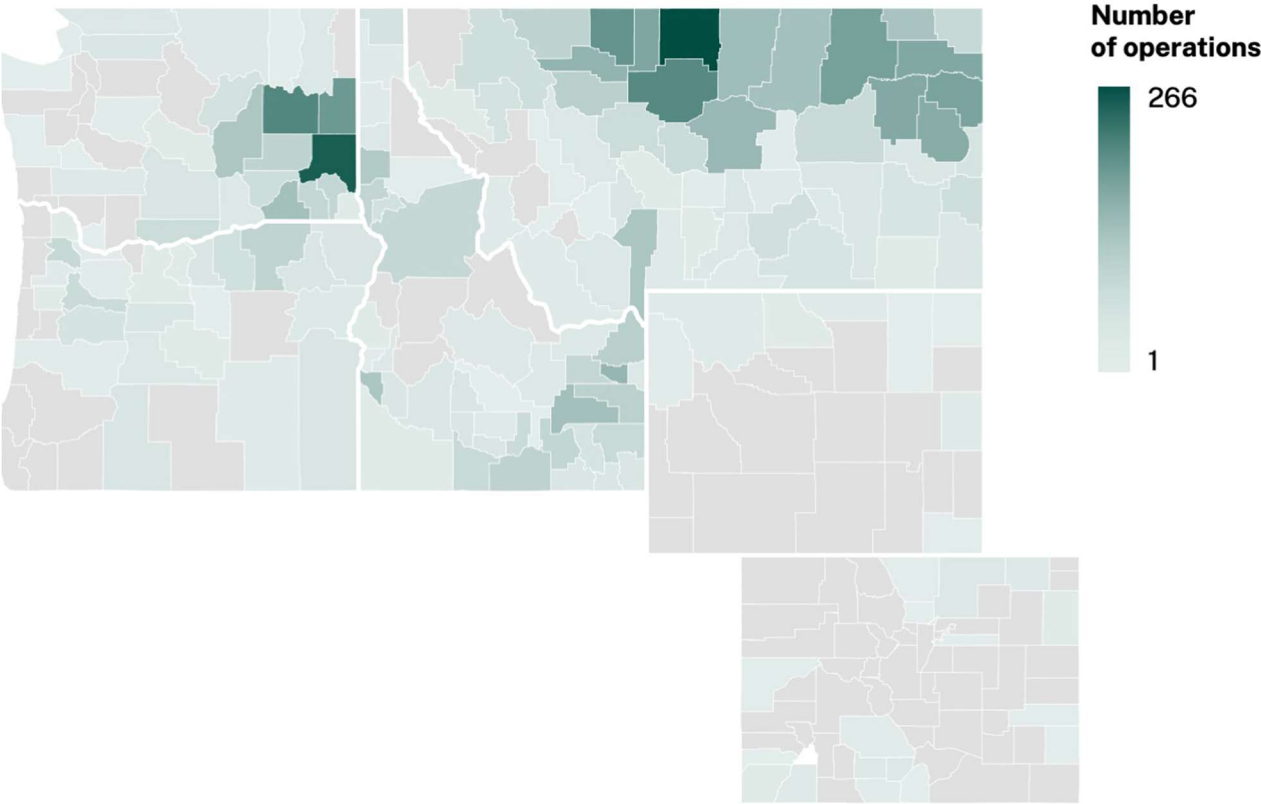
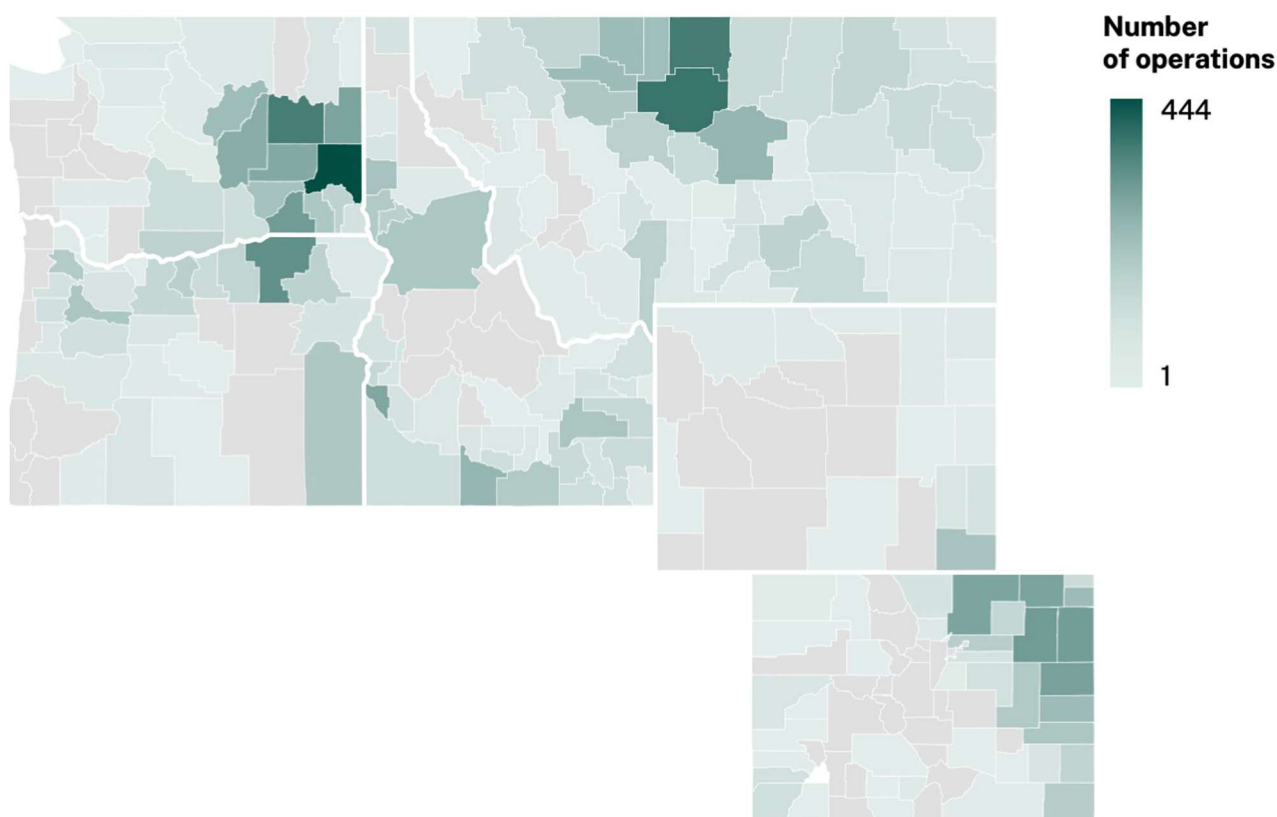


FIGURE 24 | Number of farms producing winter wheat in the service area, 2022



Farms producing less-common grains

Tables 14 and 15 display information on less commonly grown grains in the service area: emmer and spelt, proso millet, rye, sorghum, and triticale.

Table 15 displays the count of farms and their percentage distribution within the service area by state. Nearly all farms growing proso millet and sorghum are in Colorado. The majority of emmer and spelt is grown in Idaho and Montana. In the service area, sorghum is the most grown grain of the less commonly grown grain types, followed by proso millet, triticale, rye, and emmer and spelt. Sixty-two percent of farms growing sorghum and 80% of farms growing proso millet are in Colorado's East Central region.

Figures 25 through 29 map the number of farms in the service area that grow less-common grains by county.

685 farms produce sorghum; 98% are in Colorado (358,644 acres).

566 farms produce proso millet; 96% are in Colorado (332,669 acres).

131 farms produce triticale; these are spread relatively evenly across the region, except Wyoming (12,048 acres).

76 farms produce rye; 36% are in Oregon (248 acres) and 28% in Colorado (374 acres).

9 farms produce emmer and spelt; 44% are in Idaho.

TABLE 14 | *Number of farms and acres operated that produce less common grain types by state and substate region, 2022*

		Emmer and spelt		Proso millet		Rye		Sorghum		Triticale	
		Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres
Colorado	Service area	9	(D)	596	338,199	76	865	685	358,644	131	12,048
	Colorado total	1	(D)	573	332,669	21	374	671	358,644	33	3,493
	East Central	*	*	433	266,509	9	110	372	221,359	5	(D)
	Northeast	*	*	136	66,160	2	(D)	93	31,556	11	2,793
	NW and Mountain	*	*	*	*	2	(D)	1	(D)	2	(D)
	San Luis Valley	*	*	*	*	5	264	2	(D)	1	(D)
	Southeast	*	*	3	(D)	*	*	194	105,722	11	700
	Southwest	1	(D)	1	(D)	3	(D)	9	7	3	(D)
Idaho	Idaho total	4	(D)	*	*	*	0	5	(D)	26	1,920
	East	3	(D)	*	*	*	*	*	*	7	(D)
	North	*	*	*	*	*	*	*	*	*	*
	South Central	1	(D)	*	*	*	*	*	*	9	1,214
	Southwest	*	*	*	*	*	*	5	(D)	10	706
Montana	Montana total	3	(D)	2	(D)	6	(D)	5	(D)	26	1,920
	Central	*	*	*	*	2	(D)	1	(D)	1	(D)
	North Central	3	(D)	*	*	2	(D)	*	*	10	1,920
	Northeast	*	*	*	*	*	*	1	(D)	5	(D)
	Northwest	*	*	*	*	2	(D)	*	*	1	(D)
	South Central	*	*	*	*	*	*	*	*	5	(D)
	Southeast	*	*	*	*	*	*	1	(D)	2	(D)
	Southwest	*	*	2	(D)	*	*	2	(D)	2	(D)
Oregon	Oregon total	*	*	*	*	27	248	1	(D)	14	1,709
	North Central	*	*	*	*	*	*	*	*	1	(D)
	Northeast	*	*	*	*	3	60	*	*	*	*
	Northwest	*	*	*	*	10	76	1	(D)	9	1,709
	Southeast	*	*	*	*	14	112	*	*	4	(D)
	Southwest	*	*	*	*	*	*	*	*	*	*
Washington	Washington total	1	(D)	*	*	18	243	1	(D)	28	3,006
	Central	*	*	*	*	1	(D)	*	*	2	(D)
	East Central	1	(D)	*	*	4	(D)	*	*	16	1,974
	Northeast	*	*	*	*	*	*	*	*	10	1,032
	Southeast	*	*	*	*	1	(D)	*	*	*	*
	Western	*	*	*	*	12	243	1	(D)	*	*
Wyoming	Wyoming total	*	*	21	5,530	4	(D)	2	(D)	4	(D)
	Northeast	*	*	2	(D)	*	*	*	*	*	*
	Northwest	*	*	*	*	1	(D)	*	*	*	*
	South Central	*	*	*	*	*	*	*	*	*	*
	Southeast	*	*	19	5,530	3	(D)	2	(D)	4	(D)
	West	*	*	*	*	*	*	*	*	*	*

TABLE 15 | Number and percent distribution of farms by grain type and state, 2022. For example, 11% of the service area’s nine farms that grow emmer and spelt are in Colorado.

	Emmer and spelt		Proso millet		Rye		Sorghum		Triticale	
	Count	%	Count	%	Count	%	Count	%	Count	%
Service area	9	100%	596	100%	76	100%	685	100%	131	100%
Colorado	1	11%	573	96%	21	28%	671	98%	33	25%
Idaho	4	44%	0	0.0%	0	0.0%	5	1%	26	20%
Montana	3	33%	2	0.3%	6	8%	5	1%	26	20%
Oregon	0	0.0%	0	0.0%	27	36%	1	0.1%	14	11%
Washington	1	11%	0	0.0%	18	24%	1	0.1%	28	21%
Wyoming	0	0.0%	21	4%	4	5%	2	0.3%	4	3%

FIGURE 25 | Number of farms producing emmer and spelt in the service area by county, 2022

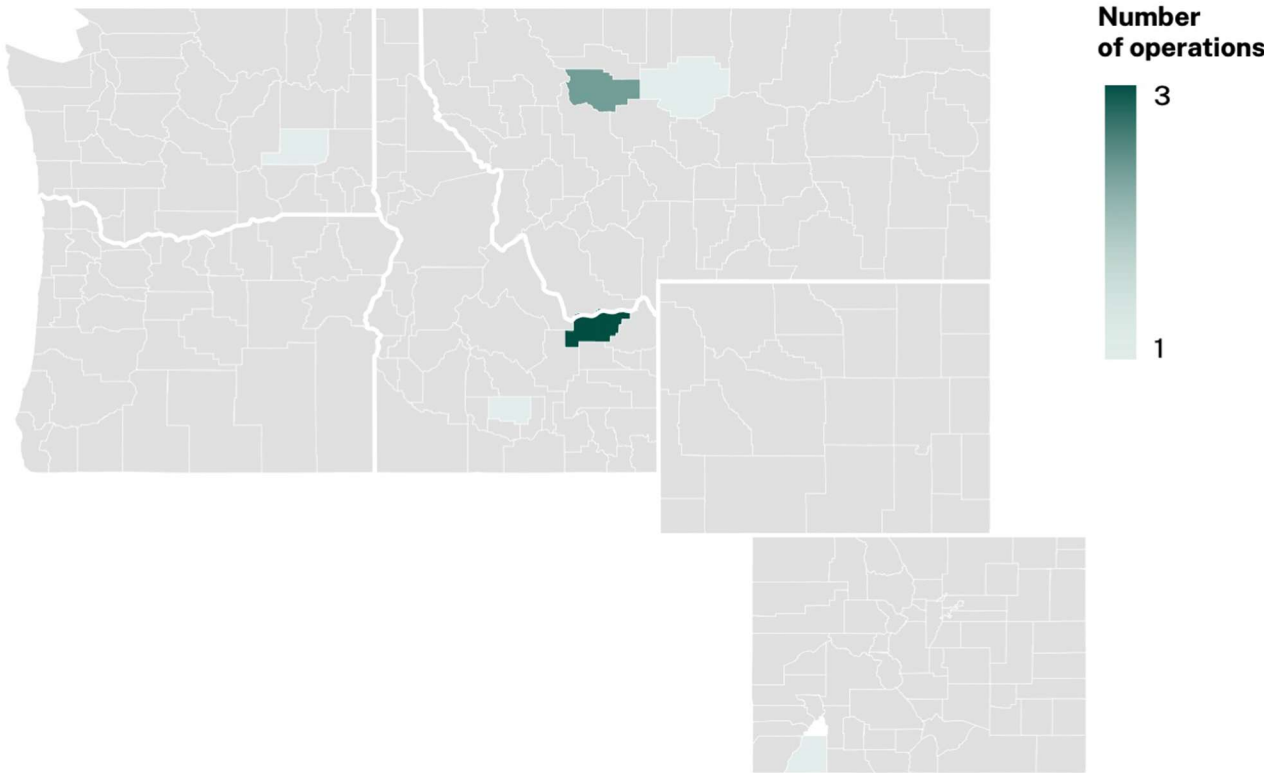


FIGURE 26 | *Number of farms producing proso millet in the service area by county, 2022*

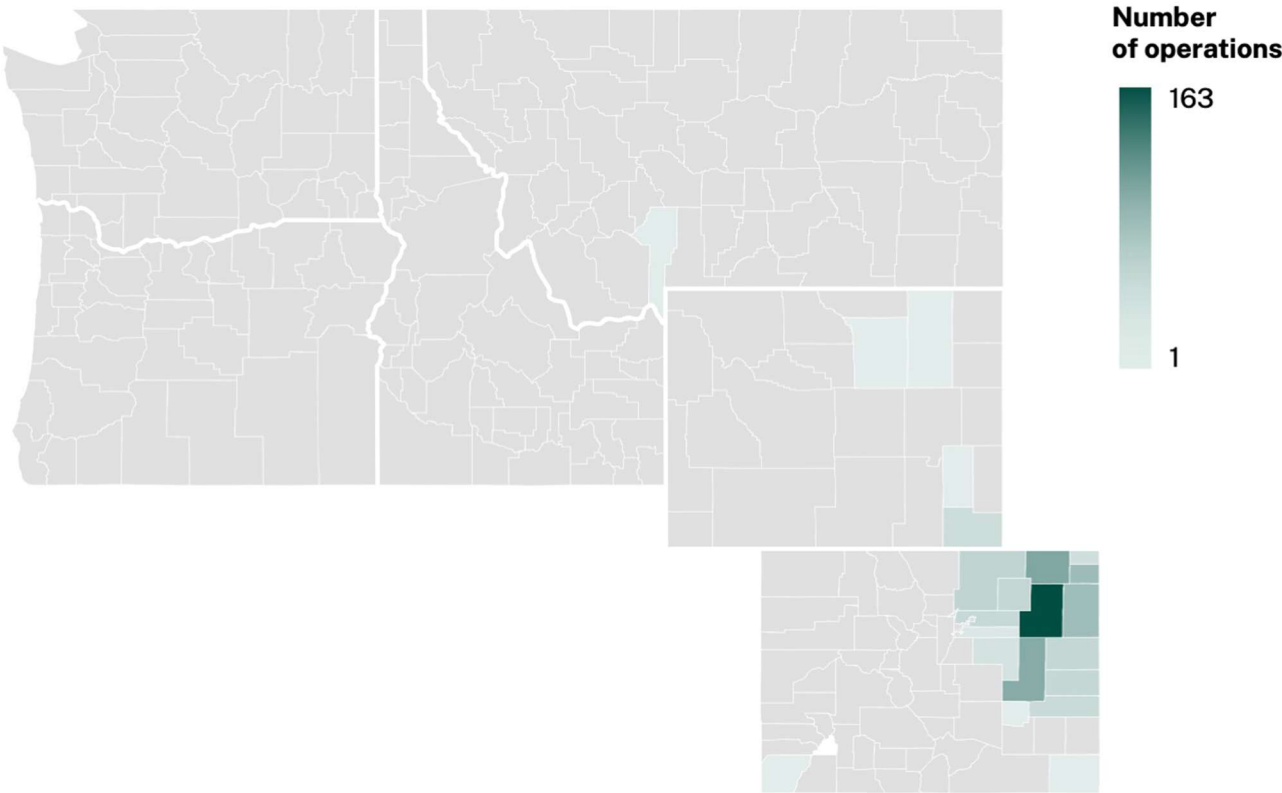


FIGURE 27 | *Number of farms producing rye in the service area by county, 2022*

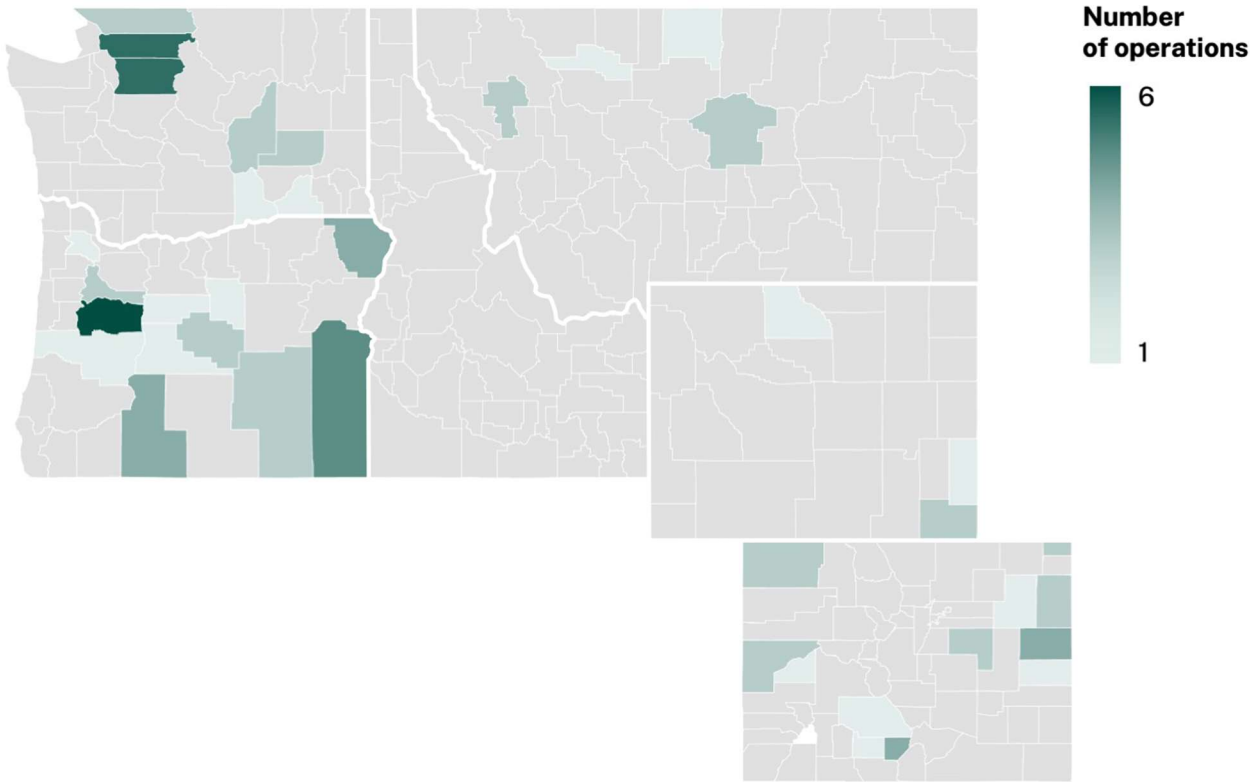


FIGURE 28 | *Number of farms producing sorghum in the service area by county, 2022*

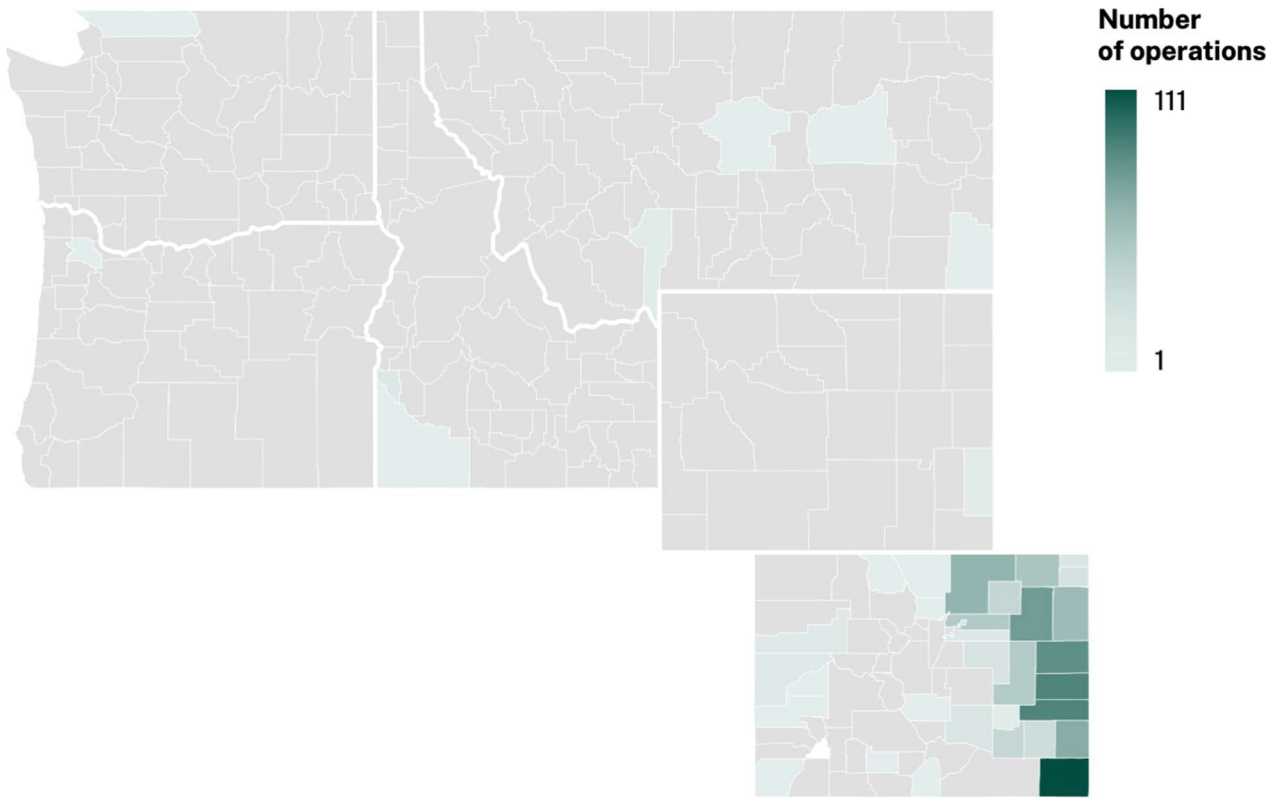
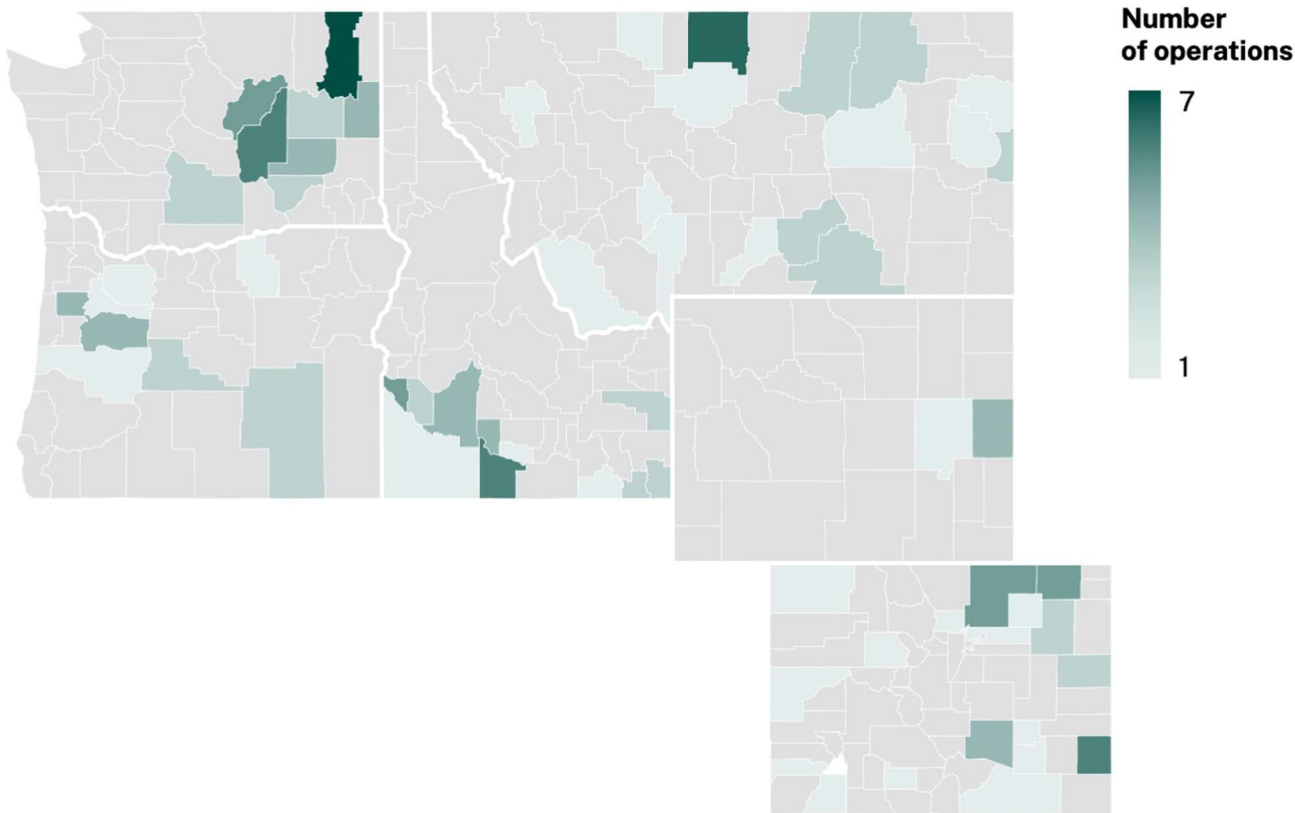


FIGURE 29 | *Number of farms producing triticale in the service area by county, 2022*



Farms producing pulses

Table 16 displays the number and percentage distribution of farms in the service area that grow pulses by type. Seventy-nine percent of farms that grow lentils and 63% of farms that grow dry peas are in Montana. Combined, Idaho, Montana, and Washington grow 98% of chickpeas, 57% of dry beans, 96% of dry peas, and nearly 100% of lentils.

671 farms produce chickpeas; 46% are in Montana (157,941 acres).

663 farms produce dry beans; 34% are in Idaho (31,992 acres).

1,368 farms produce dry peas; 63% are in Montana (492,434 acres).

843 farms produce lentils; 78% are in Montana (452,406 acres).

TABLE 16 | Number and percent distribution of farms by pulse type and state, 2022. For example, 22% of the service area's 671 farms that grow chickpeas are in Idaho.

State	Chickpeas		Dry beans		Dry peas		Lentils	
	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Service area	671	100%	663	100%	1,368	100%	843	100%
Colorado	*	*	155	23%	12	0.9%	5	0.6%
Idaho	146	22%	227	34%	155	11%	54	6%
Montana	308	46%	26	4%	865	63%	670	79%
Oregon	15	2%	30	5%	38	3%	1	0.1%
Washington	201	30%	122	18%	293	21%	117	14%
Wyoming	1	0.1%	103	16%	5	0.4%	1	0.1%

Table 17 displays the number of farms and acres that grow pulses by type. Below is a list of the highest concentration of farms in substate regions by pulse type:

- **Chickpeas:** Idaho's North region, Montana's North Central region, and Washington's Southeast region.
- **Dry beans:** Colorado's East region, Idaho's South Central region, and Washington's East Central region
- **Dry peas:** Montana's North Central and Northeast regions, and Washington's Southeast region.
- **Lentils:** Montana's Northeast and North Central regions.

Figures 30 through 33 map the distribution of farms by pulse type and county.

TABLE 17 | *Number of farms and acres operated that grow pulses by state and substate region, 2022*

		Chickpeas		Dry beans		Dry peas		Lentils	
		Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres
	Service area	671	308,569	663	107,615	1,368	604,325	843	509,028
Colorado	Colorado total	*	*	155	29,368	12	801	5	(D)
	East Central	*	*	66	15,055	4	(D)	4	(D)
	Northeast	*	*	34	5,111	3	801	*	*
	NW and Mountain	*	*	*	*	*	*	*	*
	San Luis Valley	*	*	1	(D)	4	(D)	*	*
	Southeast	*	*	12	880	*	*	*	*
	Southwest	*	*	42	8,322	1	(D)	1	(D)
Idaho	Idaho total	146	57,792	227	31,992	155	23,558	54	13,279
	East	2	(D)	6	1,121	11	300	2	(D)
	North	141	57,792	12	2,260	95	20,612	52	13,279
	South Central	*	*	148	21,916	32	1,840	*	*
	Southwest	3	(D)	61	6,695	17	806	*	*
Montana	Montana total	308	157,941	26	2,033	865	492,434	670	452,406
	Central	22	9,132	*	*	33	12,693	28	8,274
	North Central	192	107,918	2	(D)	325	177,447	235	141,012
	Northeast	85	40,891	13	1,558	416	274,252	373	295,584
	Northwest	1	(D)	*	*	14	1,988	3	(D)
	South Central	5	(D)	4	(D)	25	6,461	7	(D)
	Southeast	1	(D)	5	475	35	17,306	20	7,536
	Southwest	2	(D)	2	(D)	17	2,287	4	(D)
Oregon	Oregon total	15	12	30	4,008	38	7,535	1	(D)
	North Central	*	*	*	*	2	(D)	*	*
	Northeast	8	(D)	7	207	13	2,769	1	(D)
	Northwest	6	12	10	100	12	4,445	*	*
	Southeast	1	(D)	10	3,677	8	315	*	*
	Southwest	*	*	3	24	3	6	*	*
Washington	Washington total	201	92,824	122	26,721	293	79,997	117	43,343
	Central	*	*	7	(D)	5	2,058	*	*
	East Central	11	1,361	90	21,975	80	15,424	4	(D)
	Northeast	23	7,868	1	(D)	33	8,883	51	20,585
	Southeast	167	83,595	17	4,403	163	53,272	62	22,758
	Western	*	*	7	343	12	360	*	*
Wyoming	Wyoming total	1	(D)	103	13,493	5	(D)	1	(D)
	Northeast	*	*	*	*	*	*	1	(D)
	Northwest	*	*	72	7,111	2	(D)	*	*
	South Central	*	*	1	(D)	*	*	*	*
	Southeast	1	(D)	29	6,382	3	(D)	*	*
	West	*	*	1	(D)	*	*	*	*

FIGURE 30 | *Number of operations producing chickpeas in the service area by county, 2022*

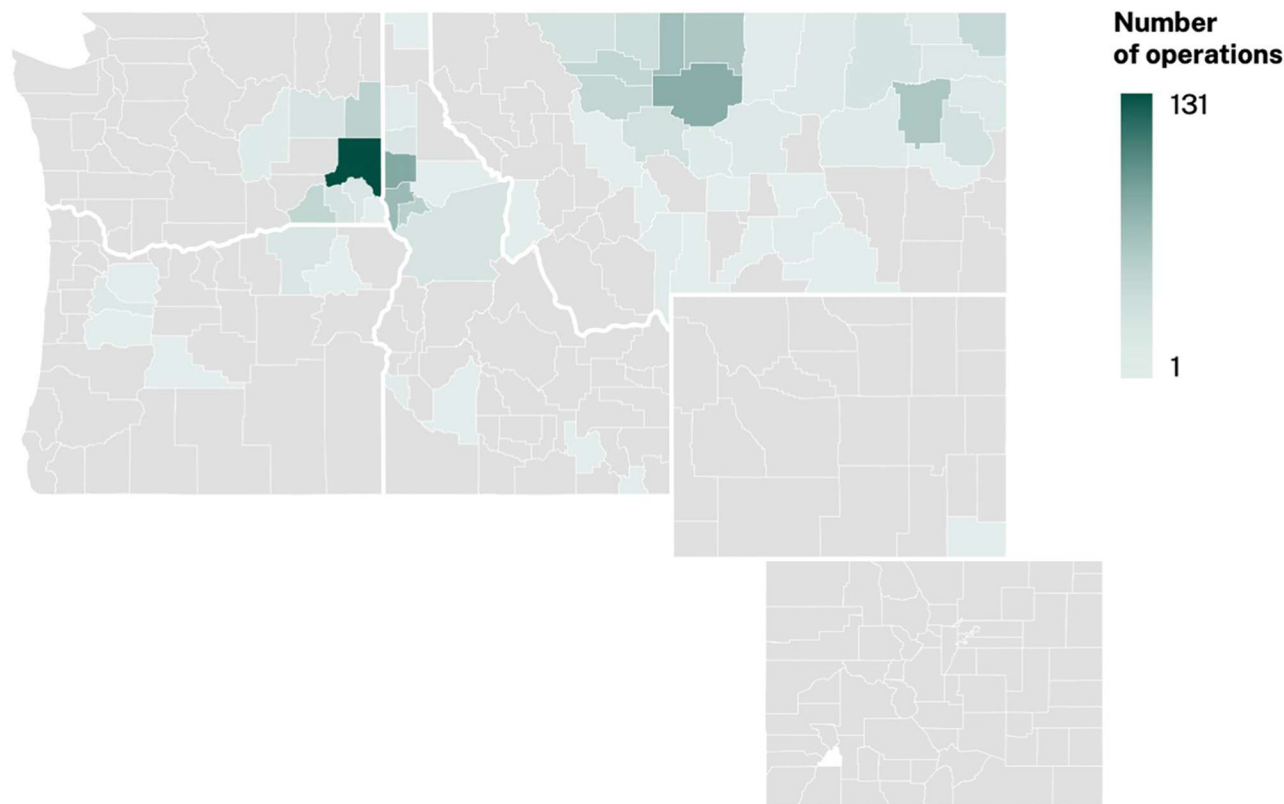


FIGURE 31 | *Number of operations producing dry beans in the service area by county, 2022*

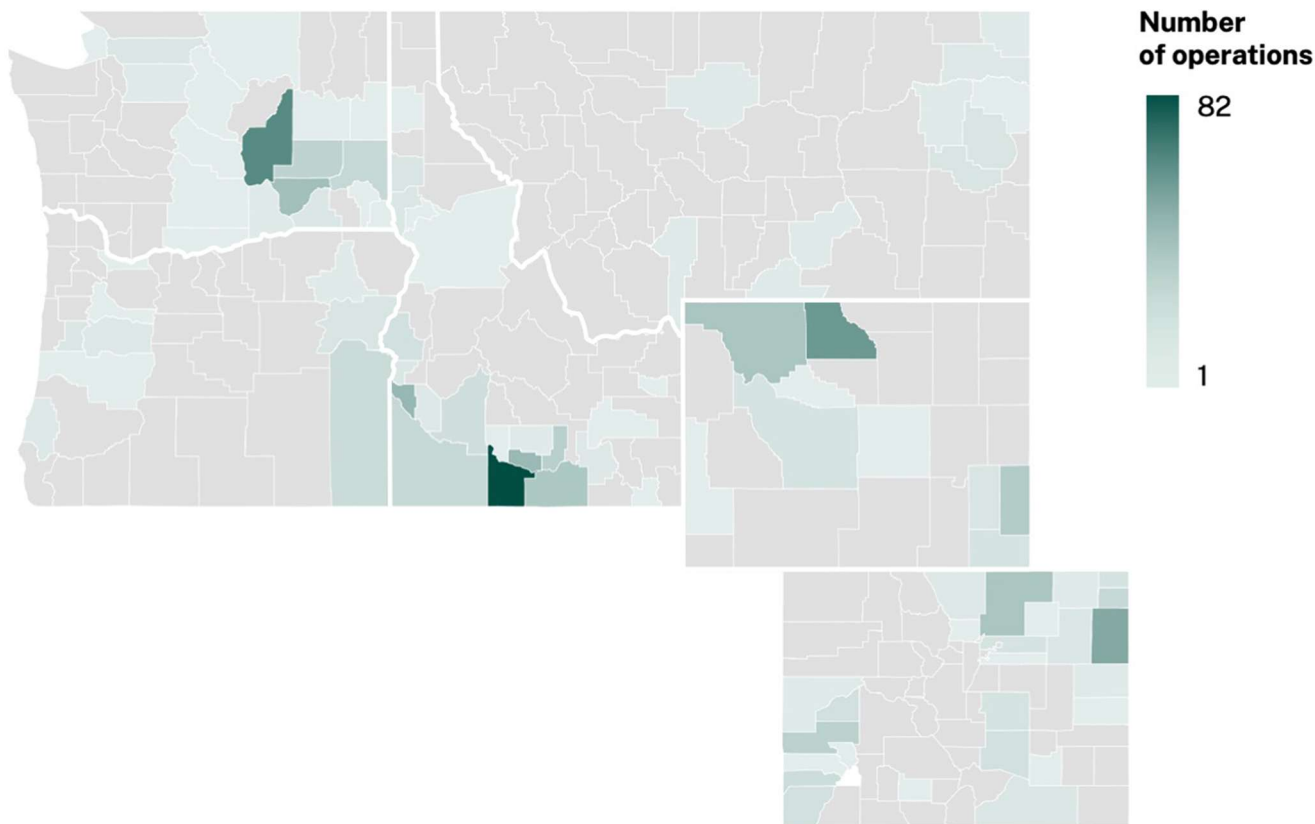


FIGURE 32 | *Number of operations producing dry peas in the service area by county, 2022*

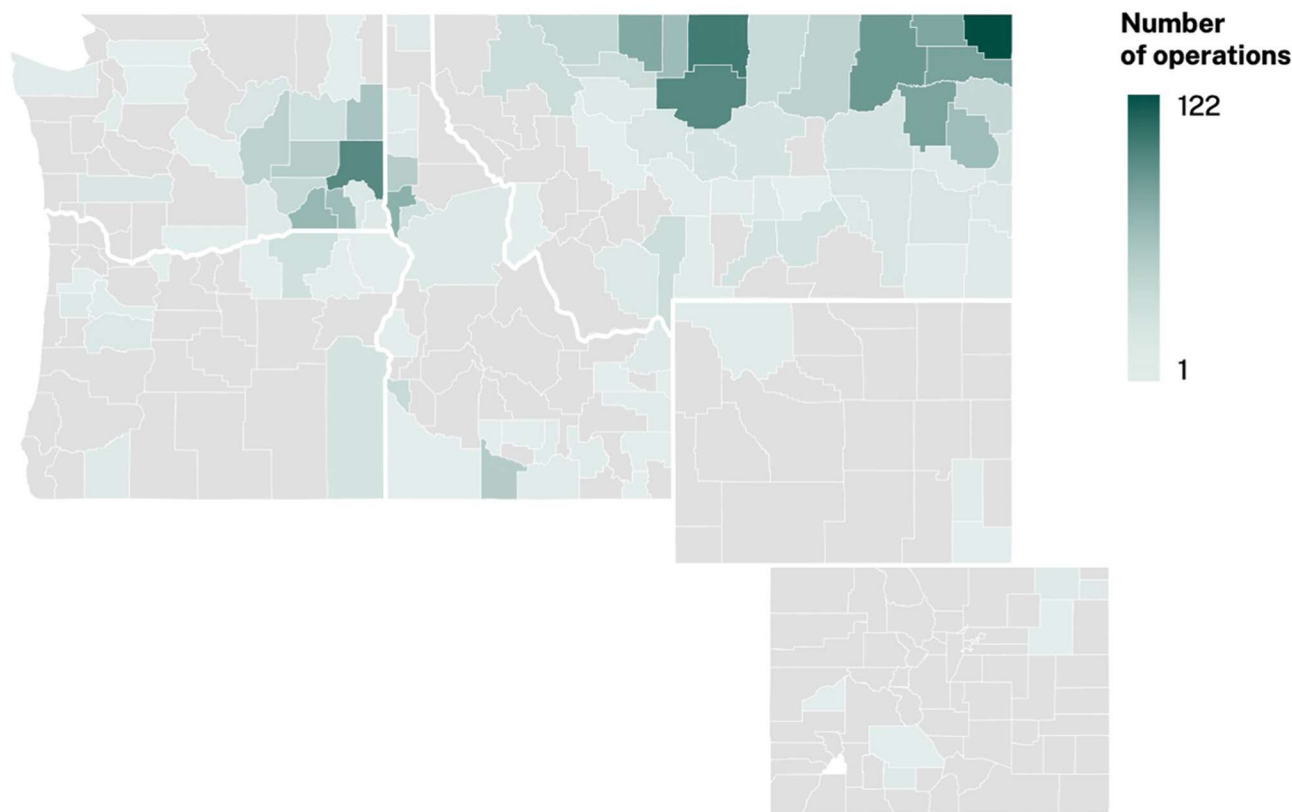
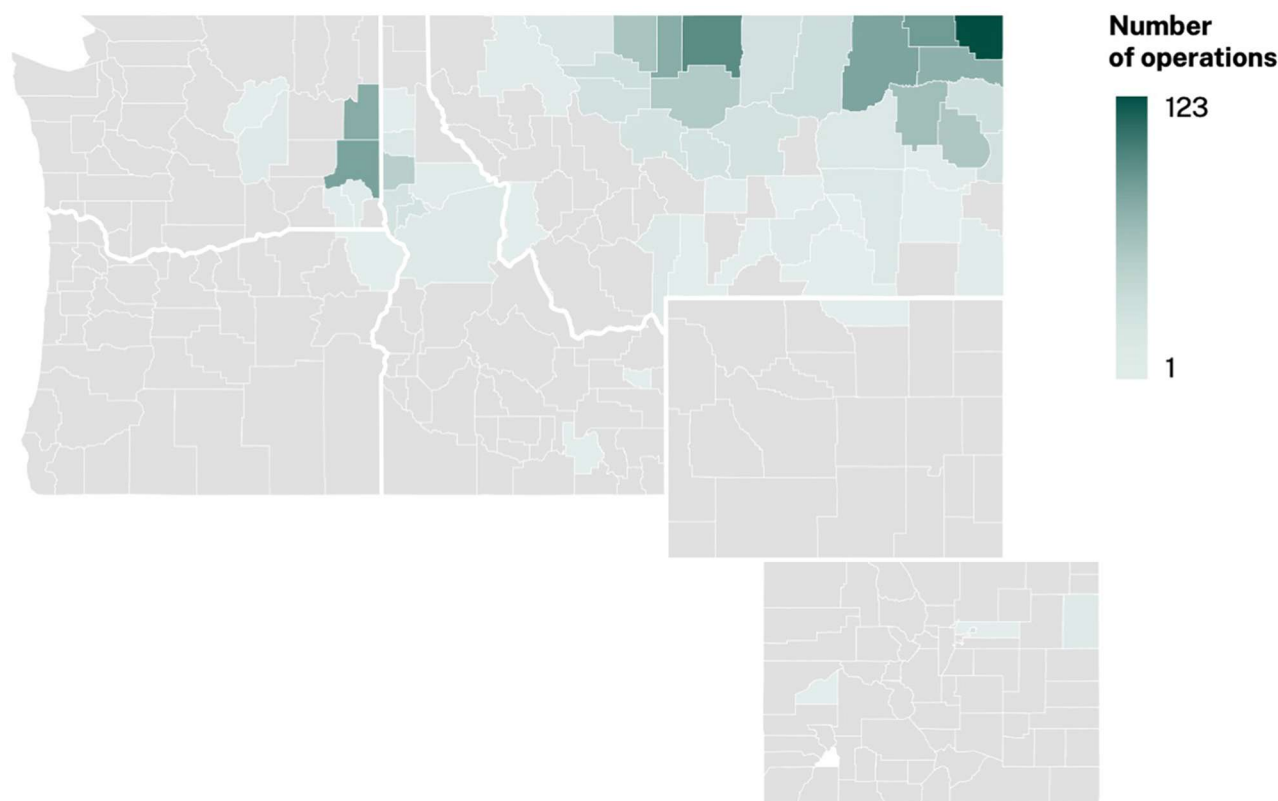


FIGURE 33 | *Number of operations producing lentils in the service area by county, 2022*



Farms producing seeds and other select crops

Table 18 displays the number and percent distribution of farms that grow seeds and other select crops by type and state. Seventy-eight percent of buckwheat is grown in Washington, 75% of canola is grown in Montana and Washington, 92% of flaxseed is grown in Montana, 74% of mustard is grown in Montana, 81% of sunflower seeds are grown in Colorado, Oregon, and Washington, 81% of soybeans are grown in Colorado and Montana.

TABLE 18 | Number and percent distribution of farms by seed and other select crop type by state, 2022. For example, 92% of the service area's 189 farms that grow flaxseed are in Montana.

State	Buck-wheat	Canola	Flaxseed	Mustard	Sunflower	Potatoes	Soybeans
Service area	49 (100%)	895 (100%)	189 (100%)	303 (100%)	197 (100%)	2,112 (100%)	157 (100%)
Colorado	1 (2%)	14 (2%)	*	*	94 (48%)	384 (18%)	63 (40%)
Idaho	*	179 (20%)	9 (5%)	50 (17%)	10 (5%)	529 (25%)	8 (5%)
Montana	3 (6%)	334 (37%)	174 (92%)	224 (74%)	18 (9%)	177 (8%)	64 (41%)
Oregon	6 (12%)	31 (3%)	2 (1%)	11 (4%)	28 (14%)	395 (19%)	6 (4%)
Washington	38 (78%)	337 (38%)	3 (2%)	18 (6%)	38 (19%)	593 (28%)	3 (2%)
Wyoming	1 (2%)	*	1 (0.5%)	*	9 (5%)	34 (2%)	13 (8%)

Table 19 displays the number of farms and acres operated that grow seeds, pseudocereals, and other select crops by type. Below is a list of the highest concentration of farms in substate regions by type:

- Buckwheat: Washington's East Central region.
- Canola: Montana's Northeast and North Central regions, Idaho's North region, and Washington's Southeast region.
- Flaxseed: Montana's Northeast and North Central regions.
- Mustard: Montana's Northeast and North Central regions.
- Sunflower: Colorado's East Central region.
- Potatoes: Idaho's East and South Central regions, and Washington's East Central region.
- Soybeans: Montana's North Central region, and Colorado's East Central region.

Figures 34 through 40 map the number of farms that grow seeds and other select crops by county.

TABLE 19 | Number of farms and acres operated that produce seeds and other select crops by type by state and substate region, 2022

		Buckwheat		Canola		Flaxseed		Mustard		Sunflower		Potatoes		Soybeans	
		Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres
Colorado	Service area	49	7,738	895	331,861	189	77,009	303	143,612	197	64,934	2,112	543,597	157	17,843
	Colorado total	1	(D)	14	4,109	*	*	*	*	94	51,806	384	16,665	63	8,732
	East Central	*	*	2	(D)	*	*	*	*	75	44,693	40	7	31	5,302
	Northeast	*	*	*	*	*	*	*	*	10	1,257	53	27	13	2,024
	NW and Mountain	*	*	*	*	*	*	*	*	*	*	30	19	*	*
	San Luis Valley	*	*	12	4,109	*	*	*	*	*	*	141	15,866	*	*
	Southeast	*	*	*	*	*	*	*	*	7	5,856	14	669	15	1,298
Idaho	Southwest	1	(D)	*	*	*	*	*	*	2	(D)	106	77	4	108
	Idaho total	*	*	179	60,322	9	(D)	50	13,676	10	787	529	283,203	8	(D)
	East	*	*	22	3,675	4	(D)	38	12,104	*	*	342	178,791	2	(D)
	North	*	*	157	56,647	*	*	4	(D)	1	(D)	37	5	1	(D)
	South Central	*	*	*	*	*	*	3	1,520	*	*	85	92,658	1	(D)
Montana	Southwest	*	*	*	*	5	(D)	5	52	9	787	65	11,749	4	(D)
	Montana total	3	(D)	334	141,761	174	77,009	224	128,041	18	4,275	177	11,007	64	8,182
	Central	*	*	28	10,464	12	999	5	(D)	3	(D)	17	1,330	1	(D)
	North Central	*	*	126	44,777	75	29,061	185	89,079	1	(D)	20	48	*	*
	Northeast	*	*	119	74,177	79	45,699	33	38,962	5	2,290	4	(D)	47	6,879
	Northwest	2	(D)	30	8,220	1	(D)	*	*	*	*	87	3,003	*	*
	South Central	*	*	9	529	1	(D)	1	(D)	2	(D)	6	6	10	1,303
	Southeast	1	(D)	11	1,622	4	1,250	*	*	7	1,985	3	(D)	4	(D)
Oregon	Southwest	*	*	11	1,972	2	(D)	*	*	*	*	40	6,620	2	(D)
	Oregon total	6	(D)	31	4,693	2	(D)	11	(D)	28	923	395	48,671	6	(D)
	North Central	*	*	3	(D)	*	*	1	(D)	3	(D)	30	23,482	*	*
	Northeast	2	(D)	20	3,735	1	(D)	5	(D)	8	840	47	19,405	2	(D)
	Northwest	4	(D)	8	958	1	(D)	4	(D)	12	75	227	74	1	(D)
	Southeast	*	*	*	*	*	*	1	(D)	*	*	55	5,696	3	(D)
Washington	Southwest	*	*	*	*	*	*	*	*	5	8	36	14	*	*
	Washington total	38	7,738	337	120,976	3	(D)	18	1,895	38	4,206	593	184,043	3	(D)
	Central	*	*	8	1,590	*	*	*	*	5	351	51	42,521	*	*
	East Central	32	6,436	102	37,313	1	(D)	5	(D)	23	3,378	185	113,885	*	*
	Northeast	*	*	82	22,262	1	(D)	3	1,345	2	(D)	53	28	2	(D)
	Southeast	6	1,302	145	59,811	1	(D)	4	550	8	477	12	12,682	1	(D)
Wyoming	Western	*	*	*	*	*	*	6	(D)	*	*	292	14,927	*	*
	Wyoming total	1	(D)	*	*	1	(D)	*	*	9	2,937	34	8	13	929
	Northeast	*	*	*	*	*	*	*	*	*	*	9	1	*	*
	Northwest	*	*	*	*	*	*	*	*	2	(D)	15	4	8	240
	South Central	*	*	*	*	*	*	*	*	*	*	*	*	1	(D)
	Southeast	1	(D)	*	*	1	(D)	*	*	7	2,937	4	(D)	4	689
West	West	*	*	*	*	*	*	*	*	*	*	6	3	*	*

FIGURE 34 | *Number of farms producing buckwheat in the service area by county, 2022*

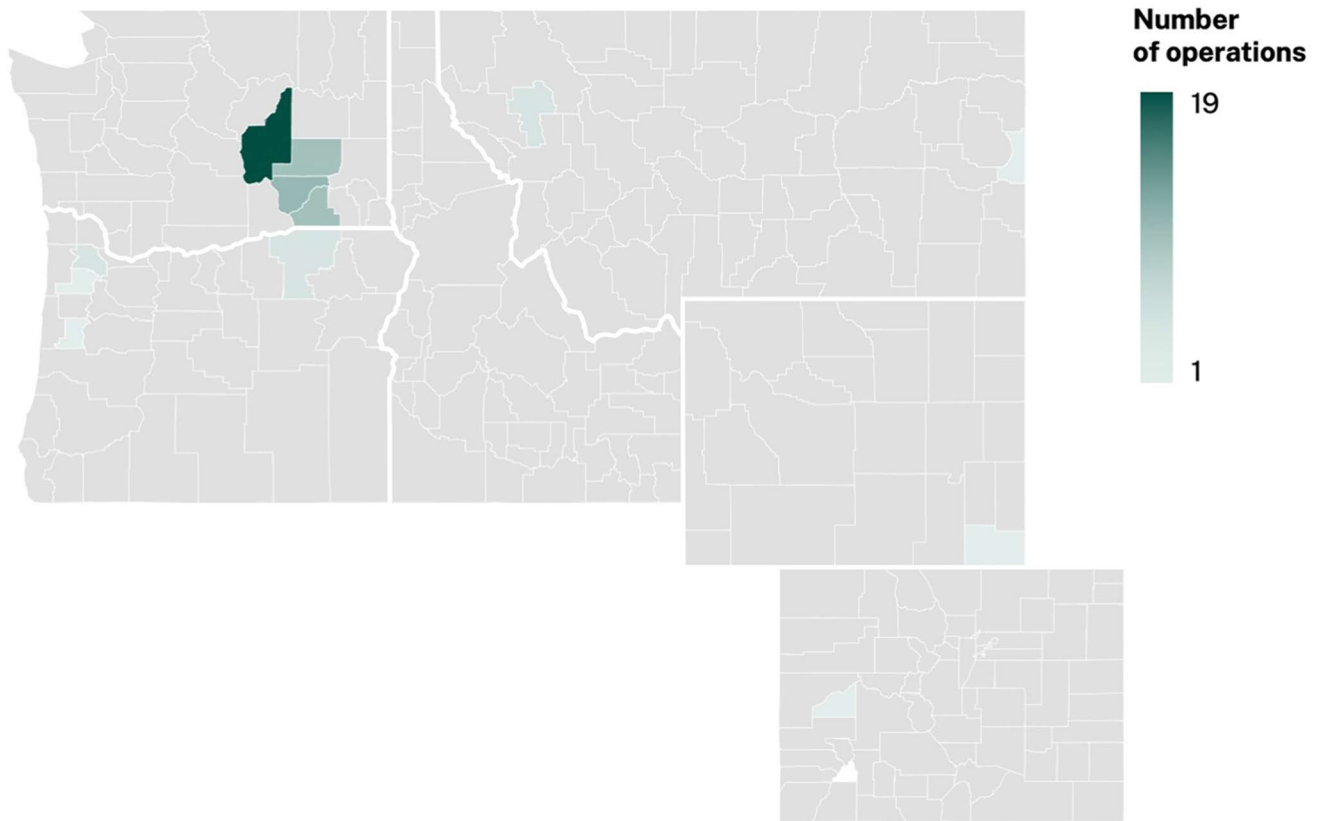


FIGURE 35 | *Number of farms producing canola in the service area by county, 2022*

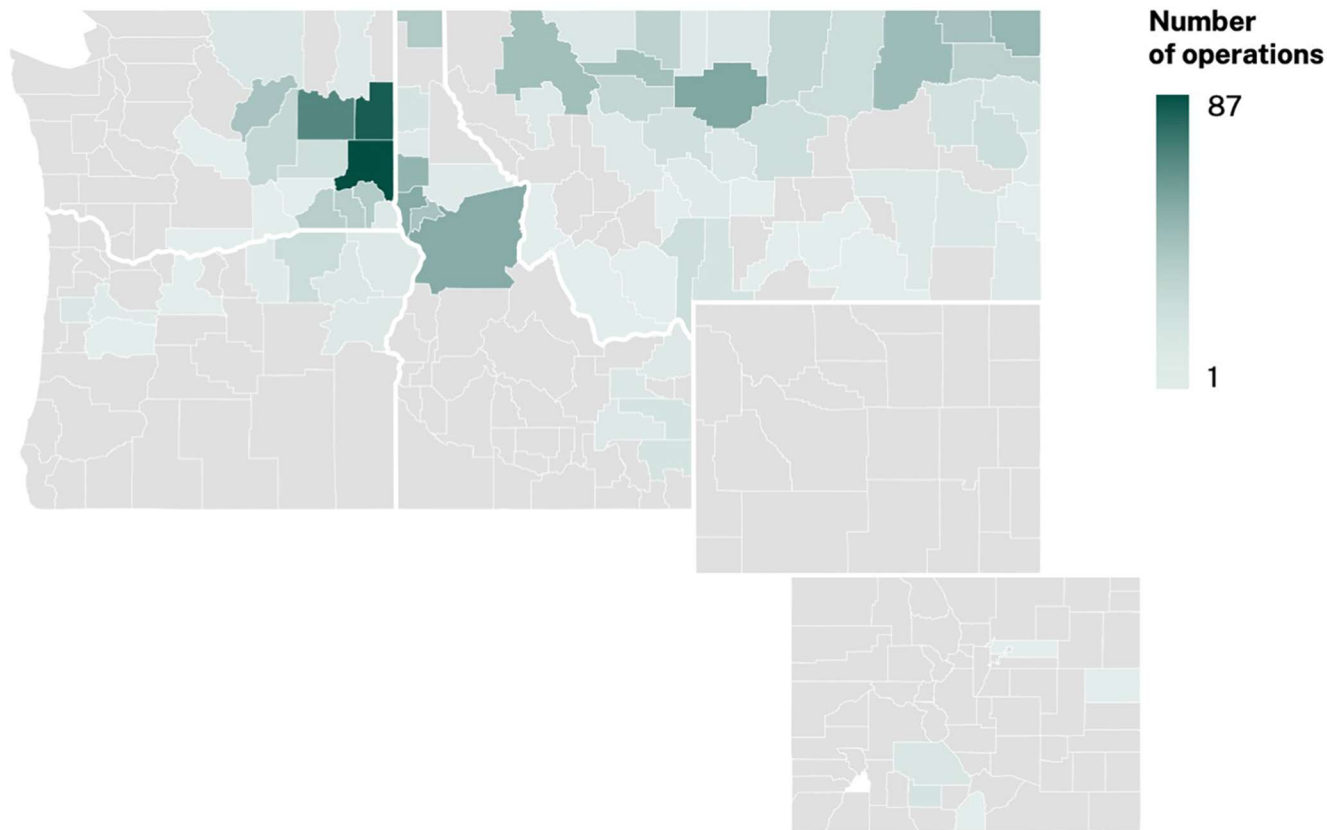


FIGURE 36 | *Number of farms producing flaxseed in the service area by county, 2022*

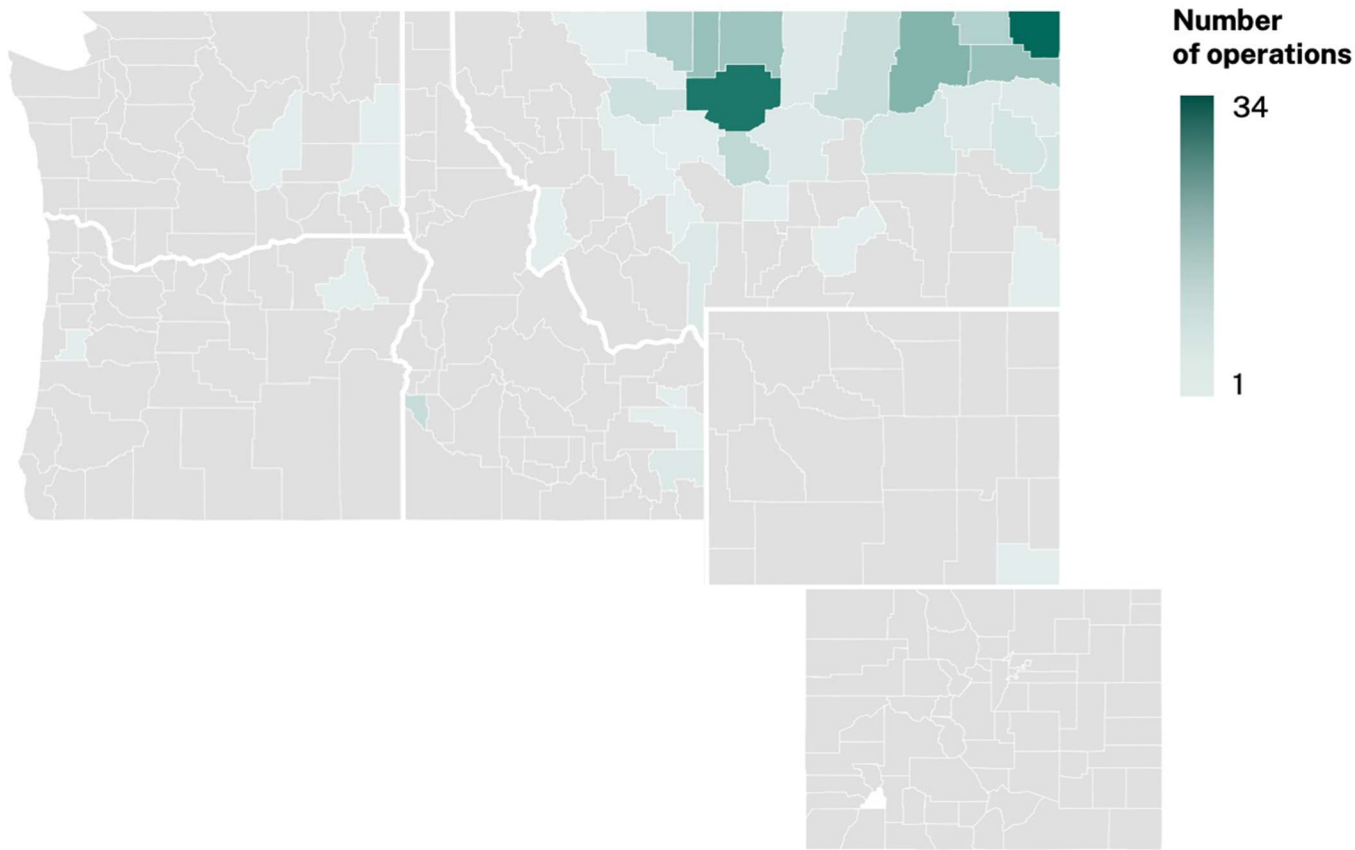


FIGURE 37 | *Number of farms producing mustard in the service area by county, 2022*

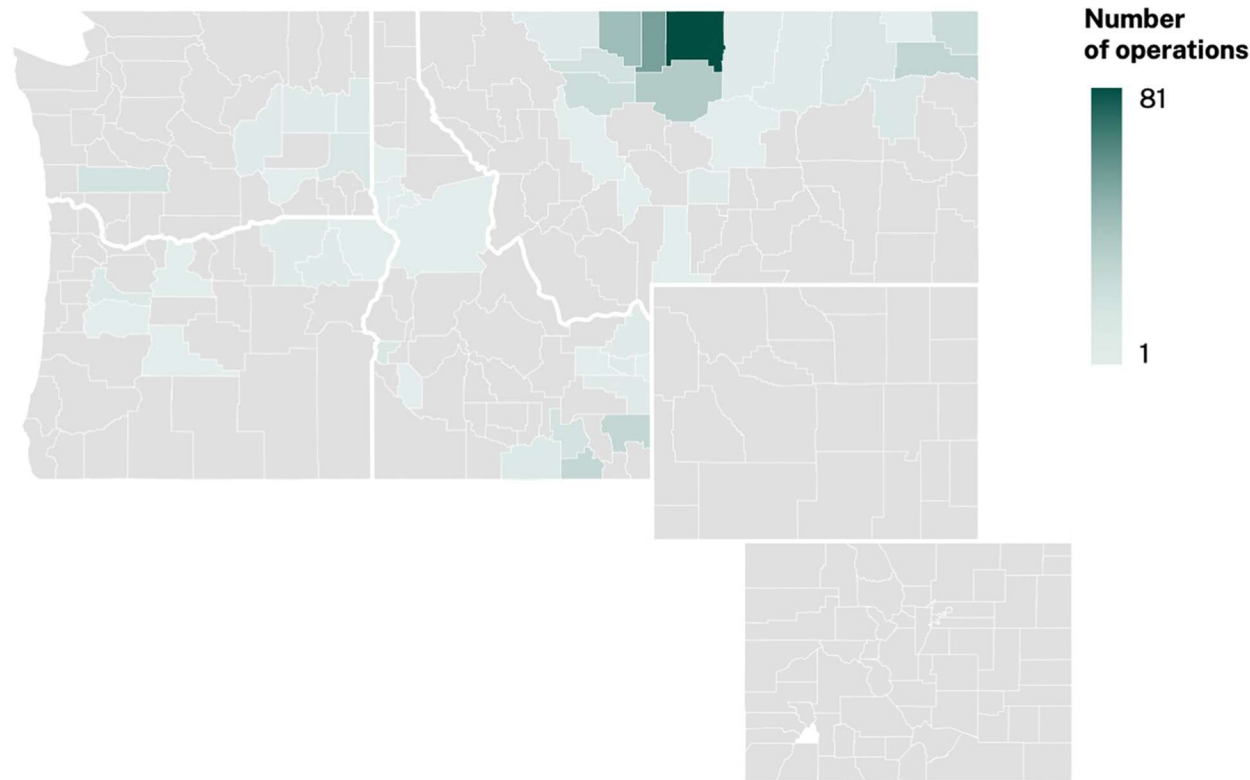


FIGURE 38 | *Number of farms producing potatoes in the service area by county, 2022*

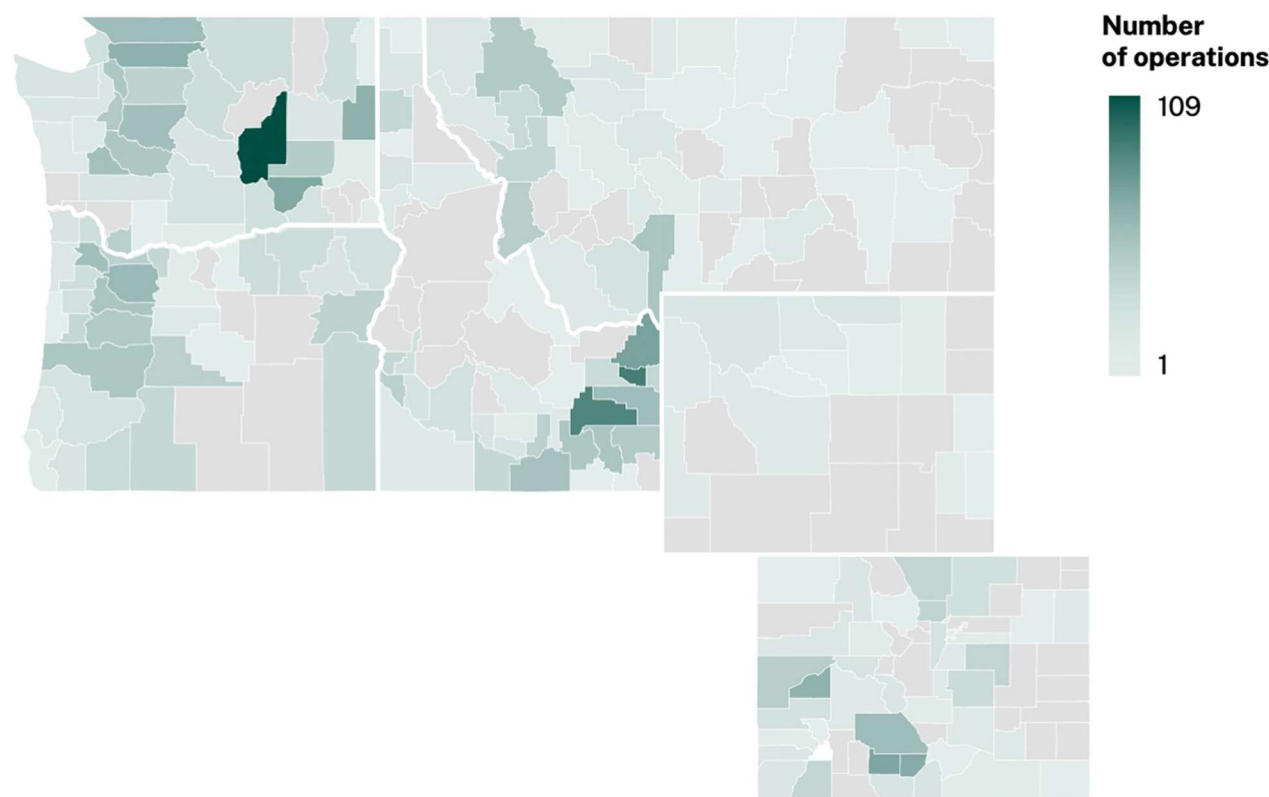


FIGURE 39 | *Number of farms producing soybeans in the service area by county, 2022*

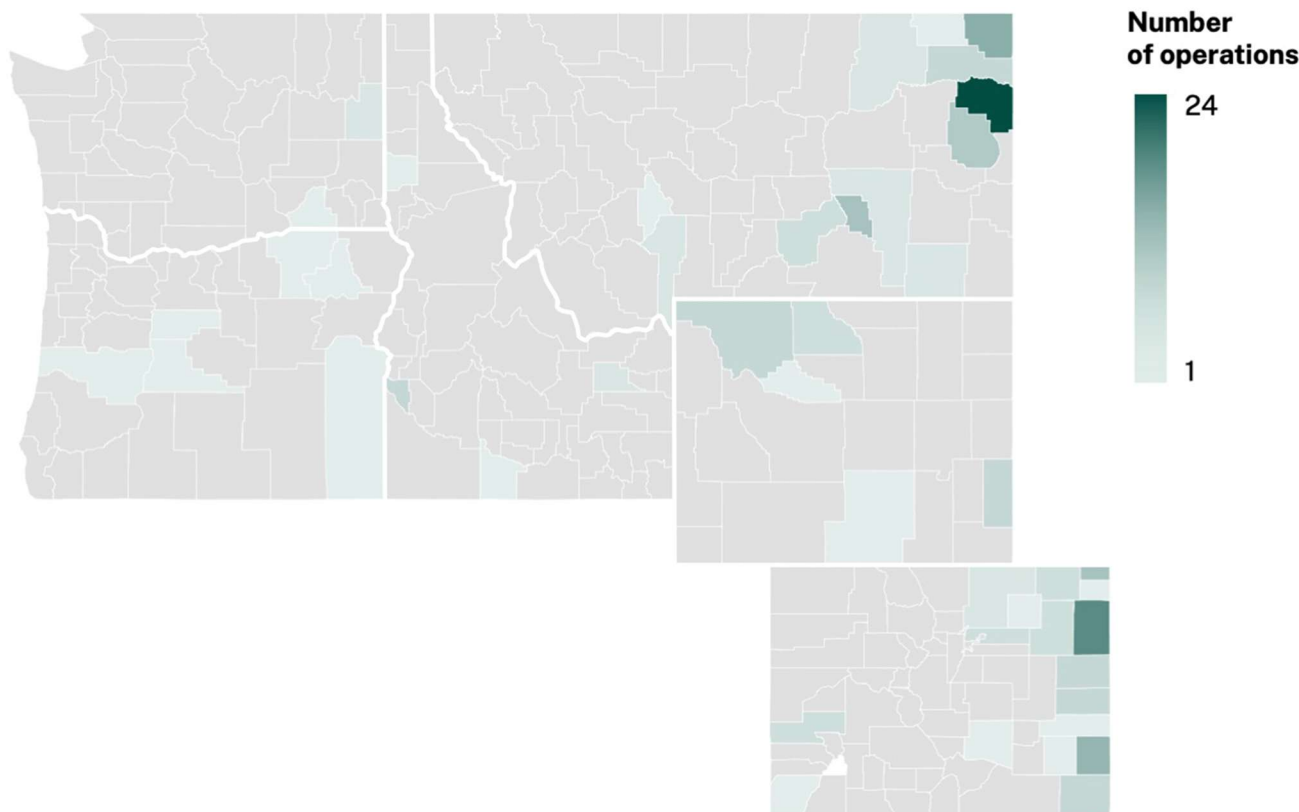
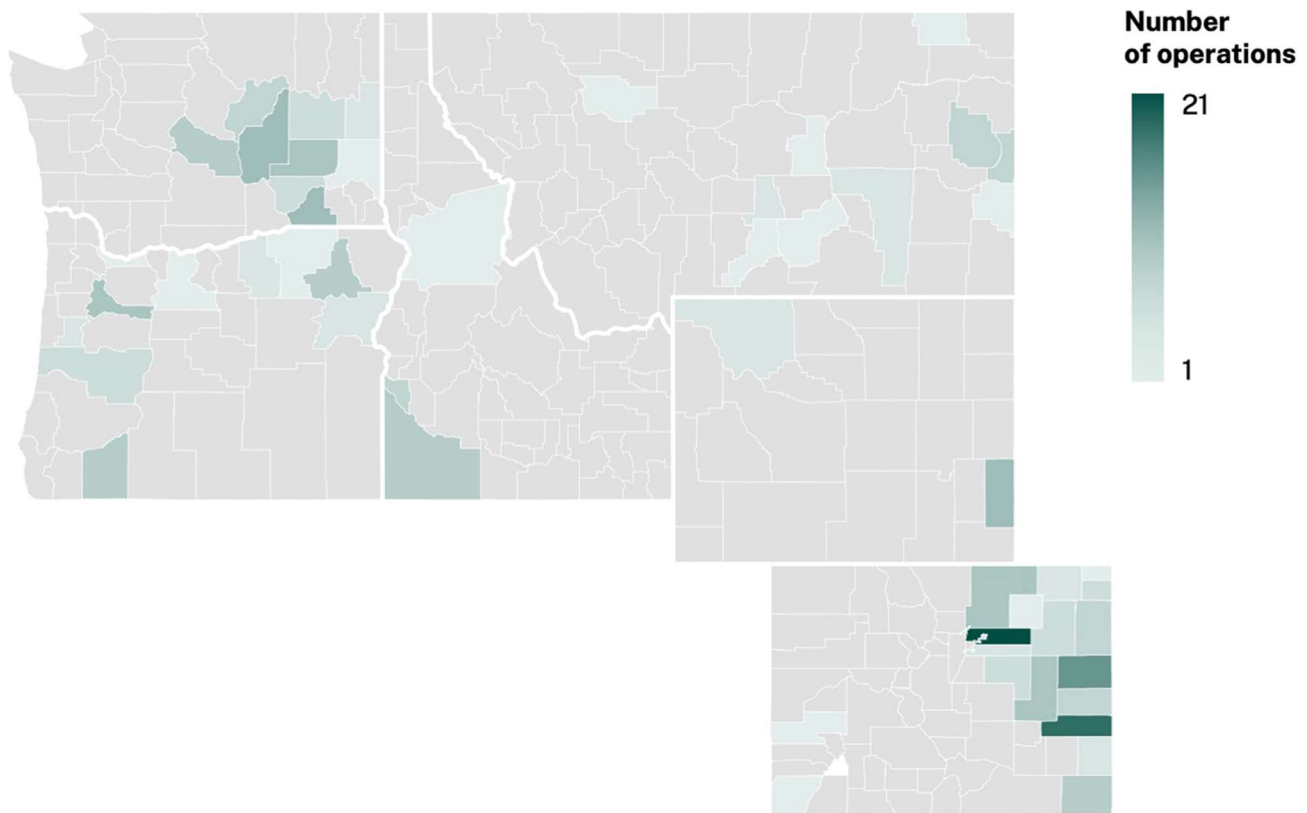


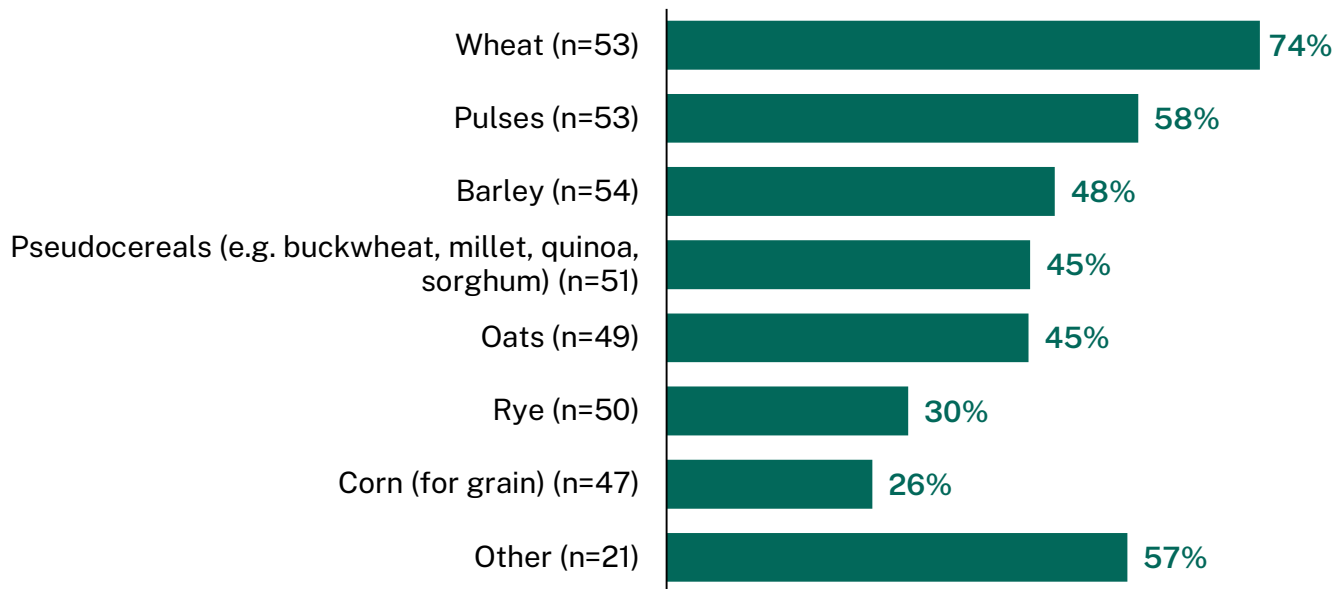
FIGURE 40 | *Number of farms producing sunflower seeds in the service area by county, 2022*



Crops farm and food business survey respondents currently grow/process and are interested in growing/processing

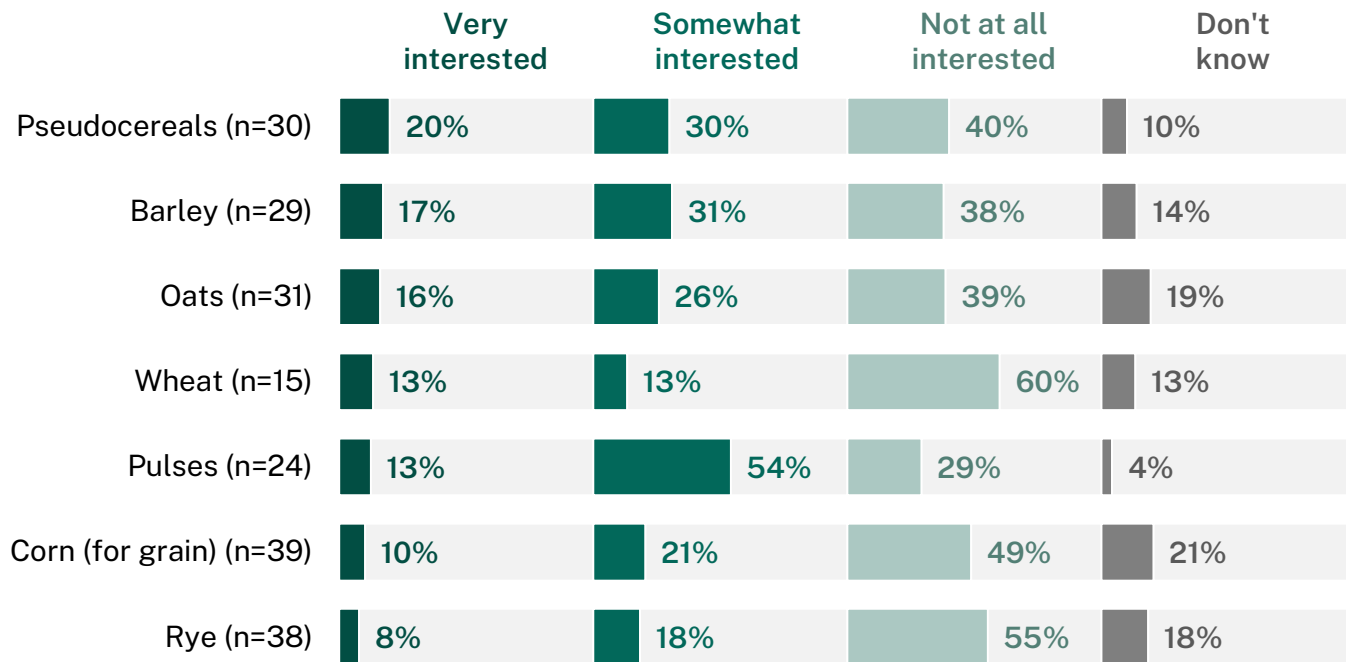
Farm and food business survey respondents who grow or process field crops were asked to specify what types (Figure 41). The majority grow or process wheat (74%) and pulses (58%), and 45% of respondents who grow or process field crops currently grow or process pseudocereals such as buckwheat, millet, quinoa, and sorghum. Respondents were asked to indicate their interest in growing or processing row crops they do not already grow or process. Half of respondents who do not already said they are somewhat or very interested in growing or processing pseudocereals and 67% who do not already said they are somewhat or very interested in growing or processing pulses (Figure 42).

FIGURE 41 | *Types of row crops grown or processed by farm and food business survey respondents*



Other responses: Ancient grains like Khorasan and spelt, canola (3), flax (3), gluten-free grains, hay, heritage/heirloom grains, Kernza, mustard seed, rice, safflower (2), sunflowers, triticale.

FIGURE 42 | *Farm and food business survey respondents' interest in growing or processing crops they do not already grow or process*



The survey asked farm and food business respondents to briefly describe the primary barriers or challenges they experience that impact their ability to grow, process, or sell ‘climate-resilient’ grains and pulses. Their responses are summarized by theme in Table 20 and available in full in Appendix B. Many respondents cited weather and climate as a challenge for growing grains in their area, along with a lack of appropriate infrastructure.

TABLE 20 | Themes from the farm and food business survey: primary challenges that impact their ability to grow, process, or sell climate-resilient grains and pulses (n=35)

Theme	Example quotes
Buyer education	"Customers want it, but getting the people in between the growers/processors and the consumer to understand what that means and the market premium."
	"Lack of marketing and sales strategy support is a big deal for us because there is a large degree of education that needs to be woven into the strategy for commercialization of these crops/products. It is not as easy as marketing something else."
	"Public awareness of farming practices."
Climate	"I'm not sure what climate-resilient grains and pulses would be. We grew garbanzo beans this last season and had a total crop failure due to weather, irrigation knowledge and weeds that got out of control."
	"Brittle environment and lack of rainfall."
	"Farm ground prices are quickly becoming home prices and climate change."
	"Lack of rain."
Labor	"Weather both for growing and storing grain."
	"We're a very small operation and don't have staff time devoted to "sales."
	"Money and labor."
Infrastructure	"Acreage and labor."
	"Access to mission-aligned capital, with the savvy and patience required to bring complex infrastructure projects and operational partnerships through to fruition."
	"Portable mills, threshers and winnowers."
	"Harvest infrastructure, post-harvest infrastructure, milling, dry storage."
	"It costs almost as much to have something malted as you can then sell the malted grain for. Would be nice to have our own malting equipment!"
	"No local/regional place to clean/dehull kernza and flake it."

Theme	Example quotes
	"There are some real issues with processing grains and pulses. There is a big need for de-hullers, cleaners and mills to help farmers produce these products."
Markets	"Time to find markets. Markets that accept crops at scale versus farmers market quantities." "There's such a limited market, or seems to be where we live. Even if there was, there isn't anybody we could sell direct to." "Our experience was that markets were fairly limited as most major grocery stores cannot do not work with small distributors, and there was slow interest for direct sales." "Market development."
Sourcing	"Finding growers...whose product we can access via shipping or trucking that doesn't inflate the price beyond what we can afford in quantities a small business can manage that can be verified as 100% WA-grown" "We can't find competitively priced Colorado milled flour that's retail ready in 1 or 2 lb. packages."
Transportation	"Transportation and packing is resource intensive and carbon based." "Transportation to all markets can be difficult, especially if rail is needed as BN has little interest in servicing small customers."

Production practices

Organic or transitioning to organic production

Just over 1% of farms in the service area (2,642 total) are certified under USDA's National Organic Program (NOP) production practices or have acres transitioning to organic production (Table 21). Farms that use USDA organic production marketing claims must either be USDA-certified or qualify for an exemption by selling \$5,000 or less in organic products annually.

The majority of these farms are concentrated in Oregon and Washington, which account for 65% of the farms using USDA organic production practices and 63% of the farms transitioning to organic (Table 22). Figures 43 and 44 illustrate the distribution of certified organic farms and farms in transition by county.

TABLE 21 | Number of operations certified or transitioning into USDA-certified organic and percentage of total farms, by state and region (including those exempt from certification), 2022. For example, 1.0% of all farms in Montana are certified organic, while 3% of farms in North Central Montana hold certification.

		Organic Count	%	Transitioning Count	%
Colorado	Service area	2,377	1%	265	0.2%
	Colorado total	315	0.9%	33	0.1%
	East Central	34	0.4%	7	0.1%
	Northeast	73	0.8%	10	0.1%
	NW and Mountain	8	0.2%	1	0.0%
	San Luis Valley	66	4%	*	*
	Southeast	25	0.6%	5	0.1%
	Southwest	109	1%	10	0.1%
Idaho	Idaho total	227	1.0%	35	0.2%
	East	60	0.8%	6	0.1%
	North	27	0.5%	16	0.3%
	South Central	100	3%	6	0.2%
	Southwest	40	0.6%	7	0.1%
Montana	Montana total	240	1.0%	23	0.1%
	Central	13	0.3%	5	0.1%
	North Central	115	3%	6	0.1%
	Northeast	16	0.5%	5	0.2%
	Northwest	69	1%	5	0.1%
	South Central	12	0.3%	2	0.1%
	Southeast	7	0.4%	*	*
	Southwest	8	0.3%	*	*
Oregon	Oregon total	590	1.7%	63	0.2%
	North Central	25	2%	5	0.3%
	Northeast	26	0.7%	*	*
	Northwest	350	2%	38	0.2%
	Southeast	92	2%	5	0.1%
	Southwest	97	2%	15	0.3%
Washington	Washington total	939	2.9%	103	0.3%
	Central	319	5%	45	0.6%
	East Central	204	5%	30	0.8%
	Northeast	14	0.4%	3	0.1%
	Southeast	11	0.4%	2	0.1%
	Western	391	3%	23	0.2%
Wyoming	Wyoming total	66	0.6%	8	0.1%
	Northeast	1	0.0%	*	*
	Northwest	7	0.3%	*	*
	South Central	3	0.2%	*	*
	Southeast	53	2%	8	0.3%
	West	2	0.1%	*	*

TABLE 22 | *Distribution of farms that use USDA organic production practices and have acres transitioning to organic by state, 2022. For example, 13% of the service area’s 2,377 farms that use NOP organic production practices are in Colorado.*

	Organic		Transitioning	
	Count	%	Count	%
Service area	2,377	100%	265	100%
Colorado	315	13%	33	12%
Idaho	227	10%	35	13%
Montana	240	10%	23	9%
Oregon	590	25%	63	24%
Washington	939	40%	103	39%
Wyoming	66	3%	8	3%

FIGURE 43 | *Number of farms with certified organic production in the service area by county, 2022*

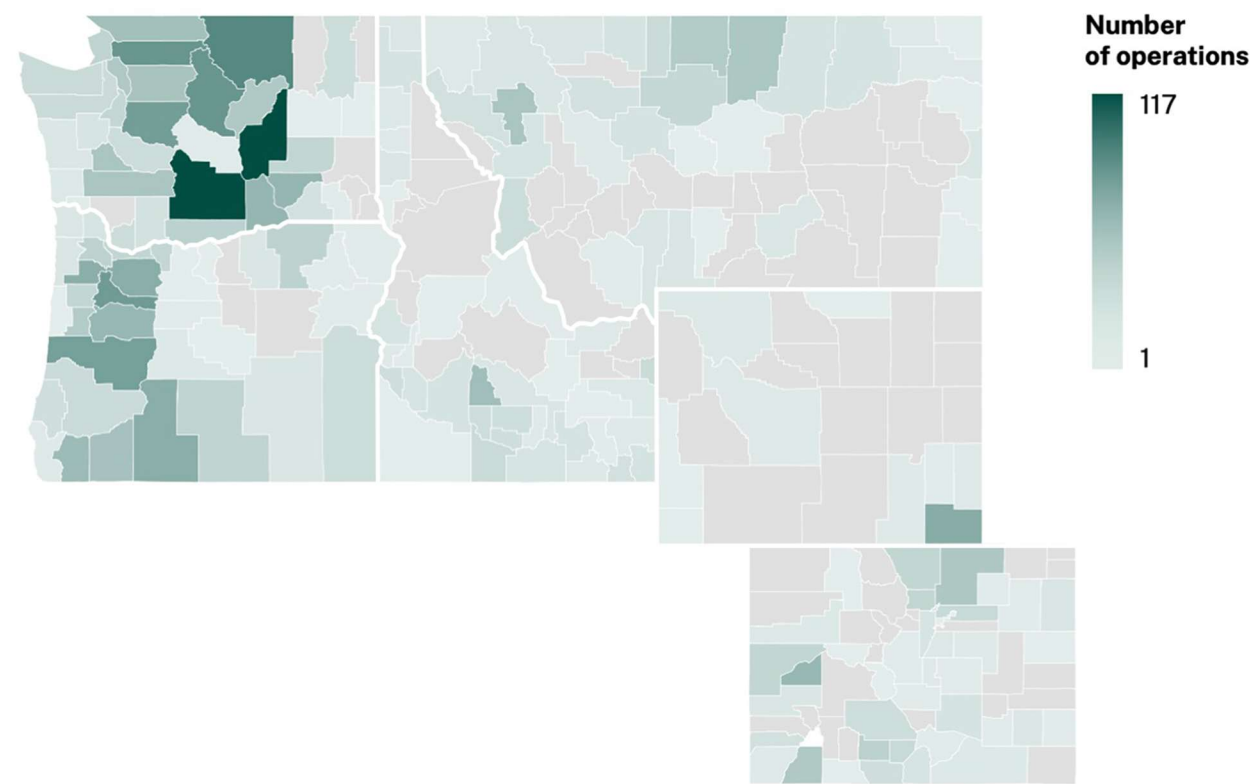
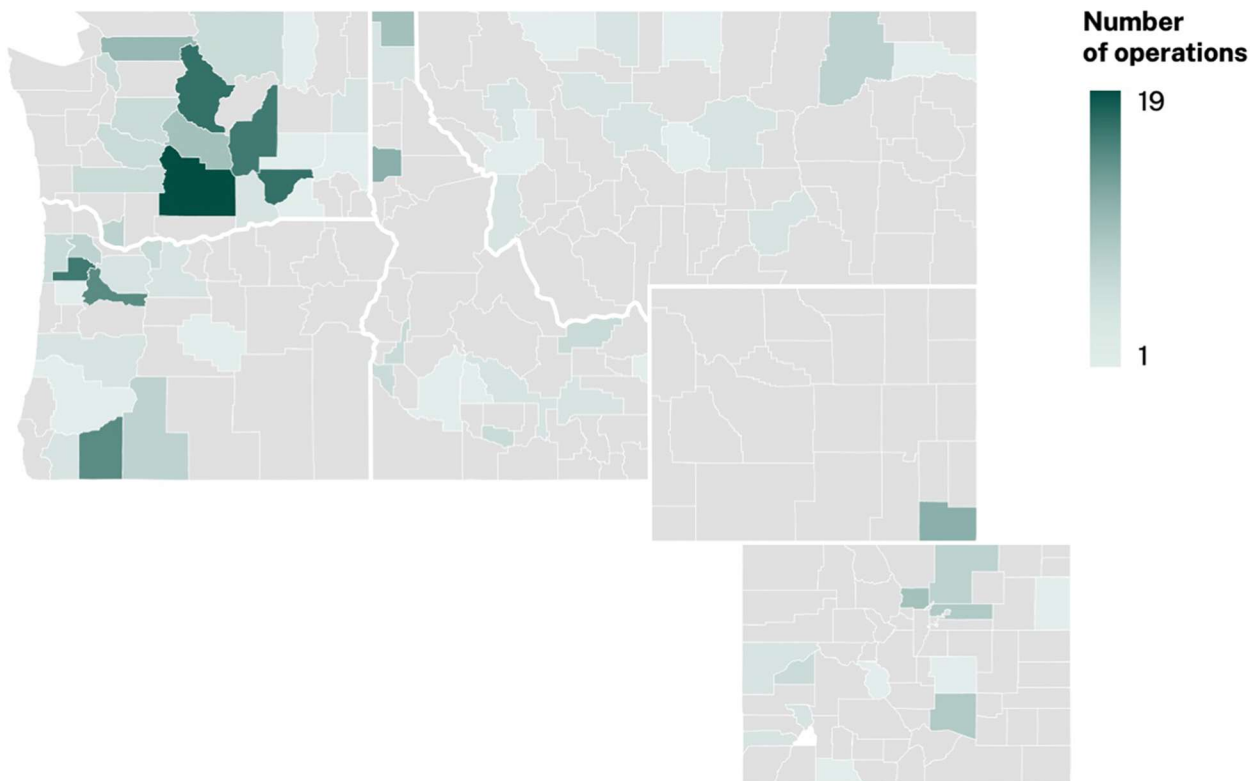


FIGURE 44 | *Number of farms transitioning into organic production in the service area by county, 2022*



Conservation practices

Farms across the service area implement a range of conservation practices. Table 23 defines the six practices included in the 2022 Census of Agriculture: conservation easements, no tillage, conservation tillage, reduced tillage, cover crops, and precision agriculture. Table 24 shows the number of farms in the service area that use each conservation practice and the percentage of farms in the service area implementing each practice, by state. For example, 36% of conservation easements in the six-state region are in Colorado and 28% of farms using cover crops are in Oregon. Of the six practices, the most widely used conservation practice in the service area is no till, with 11% of farms currently using no-till production practices (Table 25).

Figures 45-49 map the number of farms in each county by conservation practice type.

TABLE 23 | *USDA NASS definitions of select conservation practices, 2022*

Conservation practice	Definition
Conservation easements	Legal agreement voluntarily entered into by a property owner and a qualified conservation organization such as a land trust or government agency.
No tillage	Leaves 100% of the soil surface covered by crop residue after planting and does not disturb the soil.
Conservation tillage (excluding no till)	Leaves 30% or more of the soil surface covered by crop residue after planting.
Reduced tillage (excluding no till)	Leaves between 15% and up to 30% of the soil surface covered.
Cover crop	A crop planted primarily to manage soil fertility, soil quality, water, weeds, pests, diseases, or wildlife.
Precision agriculture	Practices that use technology to improve agricultural productivity or efficiency by connecting the practice to a digital environment for crop or livestock production.

TABLE 24 | *Number and percent distribution of farms by conservation practice by state, 2022. For example, 26% of farms that use no-till in the service area are in Colorado.*

	Conservation Easements	No Tillage	Conservation Tillage (excluding no till)	Cover crop	Precision Agriculture
Service area	5,139 (100%)	17,793 (100%)	13,716 (100%)	9,698 (100%)	14,177 (100%)
Colorado	1,867 (36%)	4,603 (26%)	3,875 (28%)	1,958 (20%)	3,107 (22%)
Idaho	427 (8%)	1,798 (10%)	2,102 (15%)	1,326 (14%)	2,717 (19%)
Montana	882 (17%)	4,241 (24%)	2,233 (16%)	1,109 (11%)	3,178 (22%)
Oregon	536 (10%)	3,320 (19%)	2,283 (17%)	2,691 (28%)	2,101 (15%)
Washington	1,197 (23%)	3,055 (17%)	2,533 (18%)	2,099 (22%)	2,364 (17%)
Wyoming	230 (4%)	776 (4%)	690 (5%)	515 (5%)	710 (5%)

TABLE 25 | Number and percent of farms that implement select conservation practices by type, state, and substate region, 2022. For example, 9% of all farms in the service area use precision agricultural practices compared to 12% of farms in Idaho that do.

		Conservation Easements	No Tillage	Conservation Tillage (excluding no till)	Cover crop	Precision Agriculture
Colorado	Service area	5,139 (3%)	17,793 (11%)	13,716 (8%)	9,698 (6%)	14,177 (9%)
	Colorado total	1,867 (5%)	4,603 (12%)	3,875 (11%)	1,958 (5%)	3,107 (8%)
	East Central	256 (3%)	1,595 (17%)	1,262 (14%)	366 (4%)	1,143 (12%)
	Northeast	412 (5%)	1,164 (13%)	1,047 (12%)	452 (5%)	959 (11%)
	NW and Mountain	379 (11%)	301 (8%)	186 (5%)	134 (4%)	131 (4%)
	San Luis Valley	101 (7%)	221 (15%)	235 (16%)	127 (9%)	180 (12%)
	Southeast	245 (5%)	405 (9%)	491 (11%)	188 (4%)	342 (8%)
Idaho	Southwest	474 (5%)	917 (10%)	654 (7%)	691 (7%)	352 (4%)
	Idaho total	427 (2%)	1,798 (8%)	2,102 (9%)	1,326 (6%)	2,717 (12%)
	East	200 (3%)	560 (7%)	595 (8%)	377 (5%)	894 (11%)
	North	144 (3%)	568 (11%)	497 (10%)	311 (6%)	500 (10%)
	South Central	36 (1%)	263 (7%)	488 (13%)	271 (7%)	709 (19%)
Montana	Southwest	47 (0.7%)	407 (6%)	522 (8%)	367 (6%)	614 (9%)
	Montana total	882 (4%)	4,241 (17%)	2,233 (9%)	1,109 (5%)	3,178 (13%)
	Central	136 (4%)	586 (15%)	289 (8%)	198 (5%)	381 (10%)
	North Central	126 (3%)	1,644 (40%)	567 (14%)	167 (4%)	1,240 (30%)
	Northeast	67 (2%)	902 (29%)	549 (18%)	107 (3%)	689 (23%)
	Northwest	284 (5%)	333 (6%)	226 (4%)	295 (6%)	157 (3%)
	South Central	100 (3%)	333 (9%)	277 (8%)	123 (3%)	308 (9%)
	Southeast	24 (1%)	233 (13%)	158 (9%)	91 (5%)	168 (9%)
Oregon	Southwest	145 (6%)	210 (8%)	167 (7%)	128 (5%)	235 (9%)
	Oregon total	536 (2%)	3,320 (9%)	2,283 (6%)	2,691 (8%)	2,101 (6%)
	North Central	57 (4%)	255 (16%)	145 (9%)	120 (7%)	220 (14%)
	Northeast	74 (2%)	335 (9%)	308 (9%)	160 (4%)	382 (11%)
	Northwest	290 (2%)	1,667 (9%)	1,095 (6%)	1,624 (8%)	935 (5%)
	Southeast	52 (0.9%)	425 (8%)	419 (8%)	315 (6%)	405 (7%)
Washington	Southwest	63 (1%)	638 (12%)	316 (6%)	472 (9%)	159 (3%)
	Washington total	1,197 (4%)	3,055 (10%)	2,533 (8%)	2,099 (7%)	2,364 (7%)
	Central	110 (2%)	424 (6%)	391 (6%)	537 (8%)	407 (6%)
	East Central	92 (2%)	489 (13%)	595 (15%)	244 (6%)	864 (22%)
	Northeast	74 (2%)	343 (9%)	284 (8%)	245 (7%)	216 (6%)
	Southeast	114 (5%)	521 (21%)	536 (22%)	94 (4%)	471 (19%)
Wyoming	Western	807 (5%)	1,278 (9%)	727 (5%)	979 (7%)	406 (3%)
	Wyoming total	230 (2%)	776 (7%)	690 (7%)	515 (5%)	710 (7%)
	Northeast	37 (1%)	126 (5%)	83 (3%)	124 (5%)	113 (5%)
	Northwest	82 (3%)	248 (9%)	248 (9%)	200 (7%)	265 (10%)
	South Central	24 (2%)	81 (6%)	54 (4%)	40 (3%)	50 (4%)
	Southeast	33 (1%)	225 (9%)	263 (10%)	96 (4%)	229 (9%)
	West	54 (4%)	96 (7%)	42 (3%)	55 (4%)	53 (4%)

FIGURE 45 | *Number of farms that have a conservation easement in the service area by county, 2022*

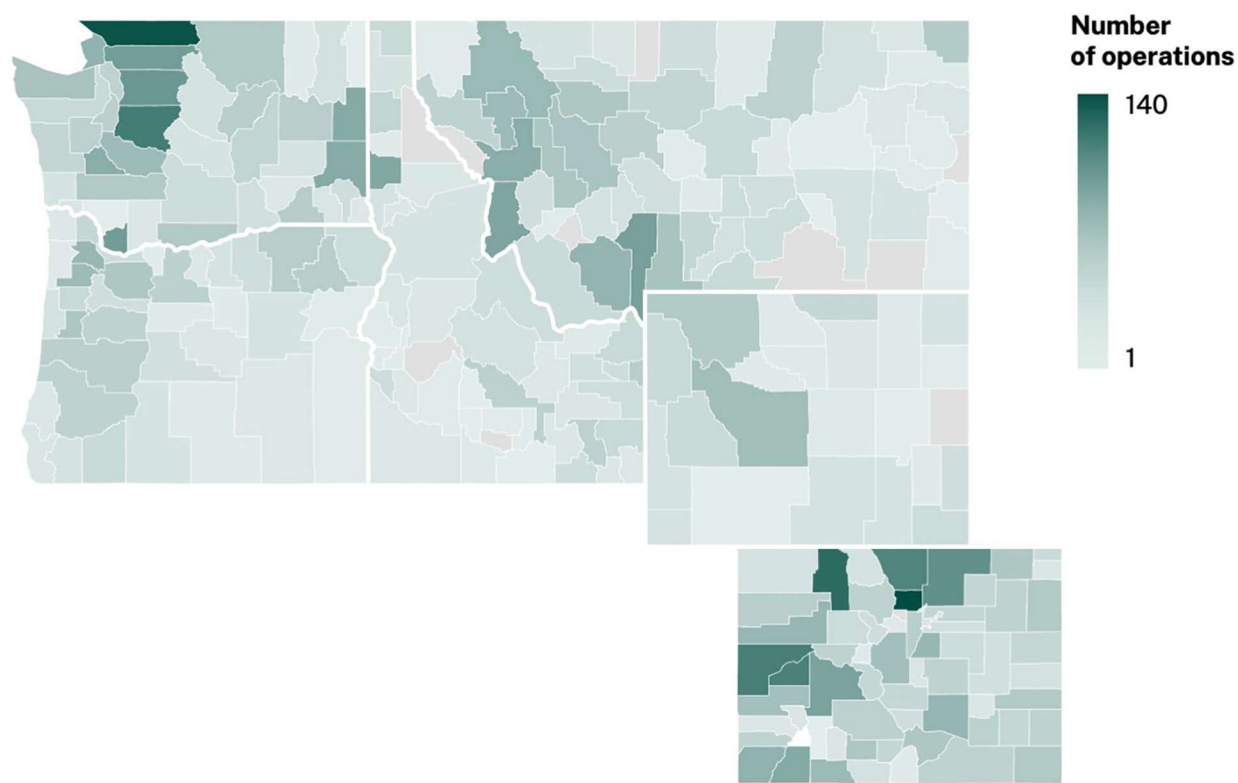


FIGURE 46 | *Number of farms that practice conservation tillage (excluding no till) in the service area by county, 2022*

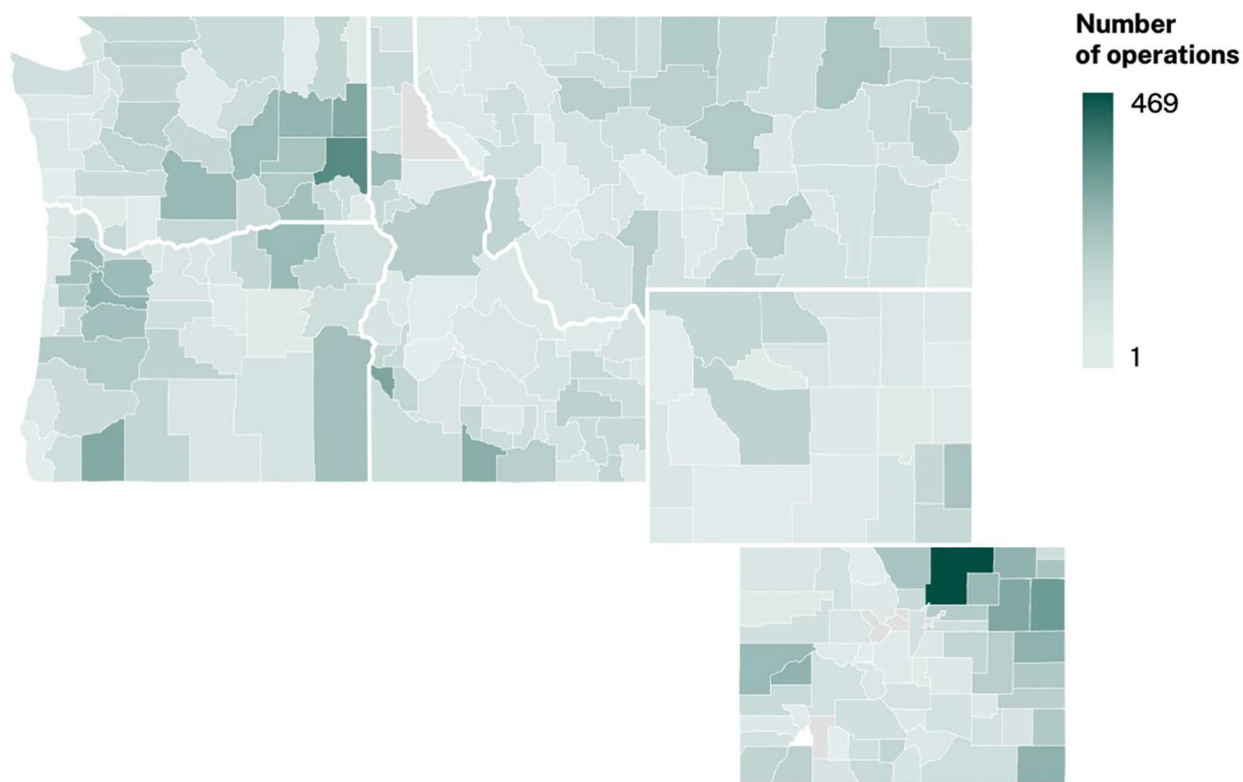


FIGURE 47 | *Number of farms that practice no till in the service area by county, 2022*

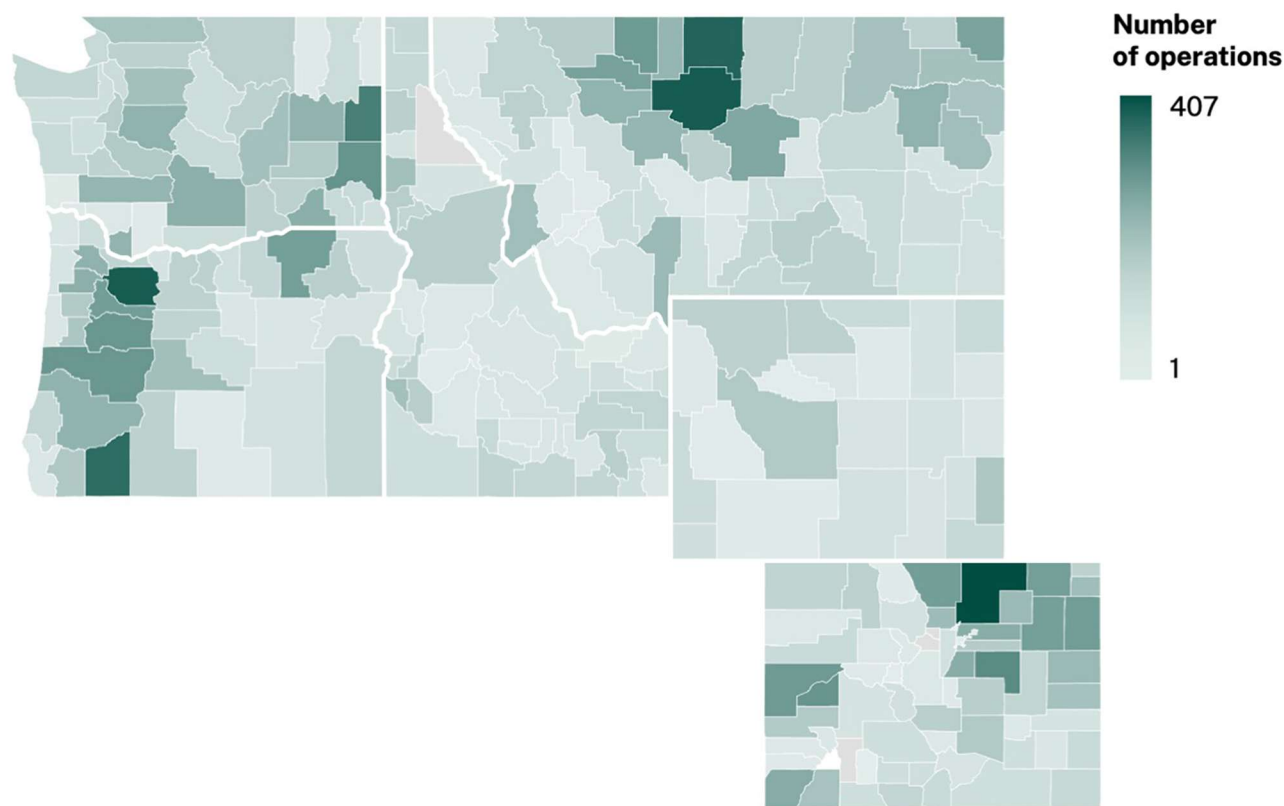


FIGURE 48 | *Number of farms that practice cover cropping in the service area by county, 2022*

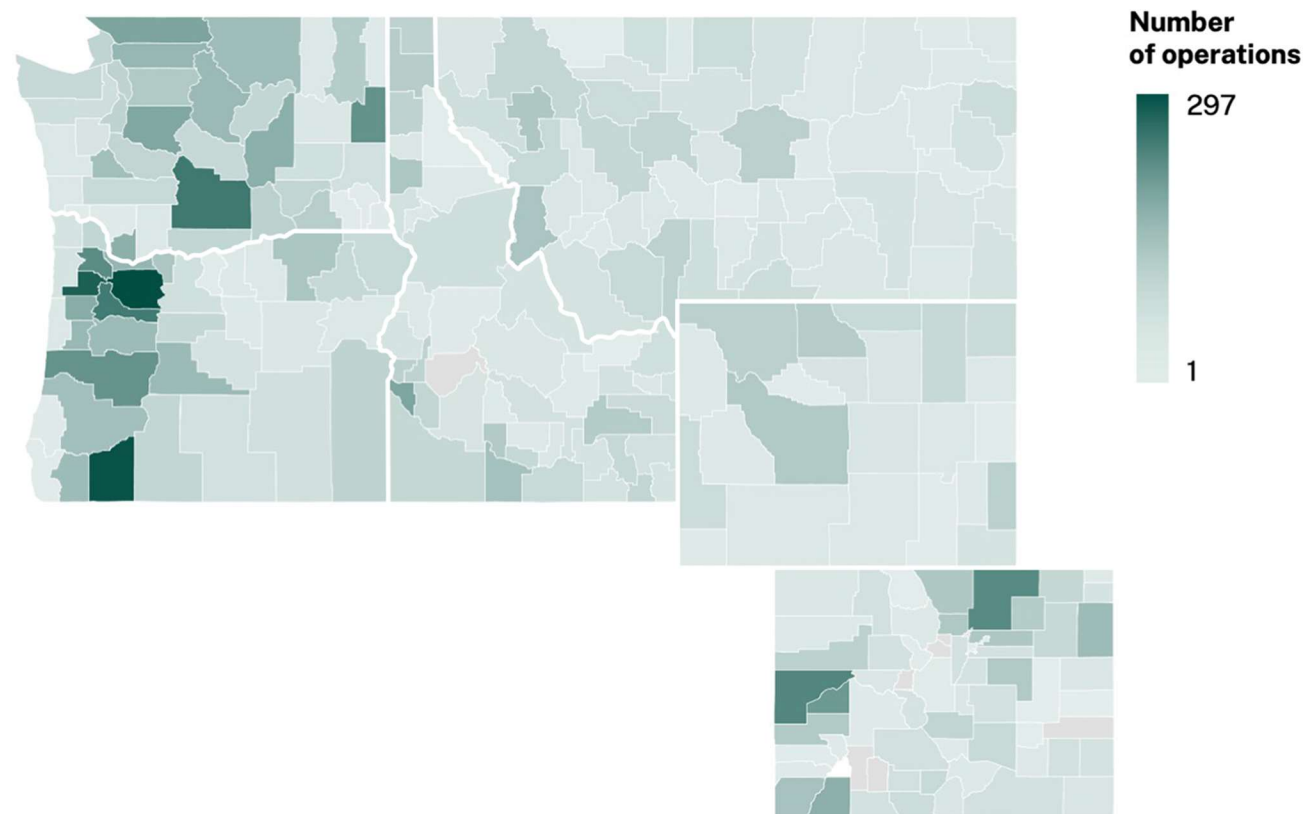
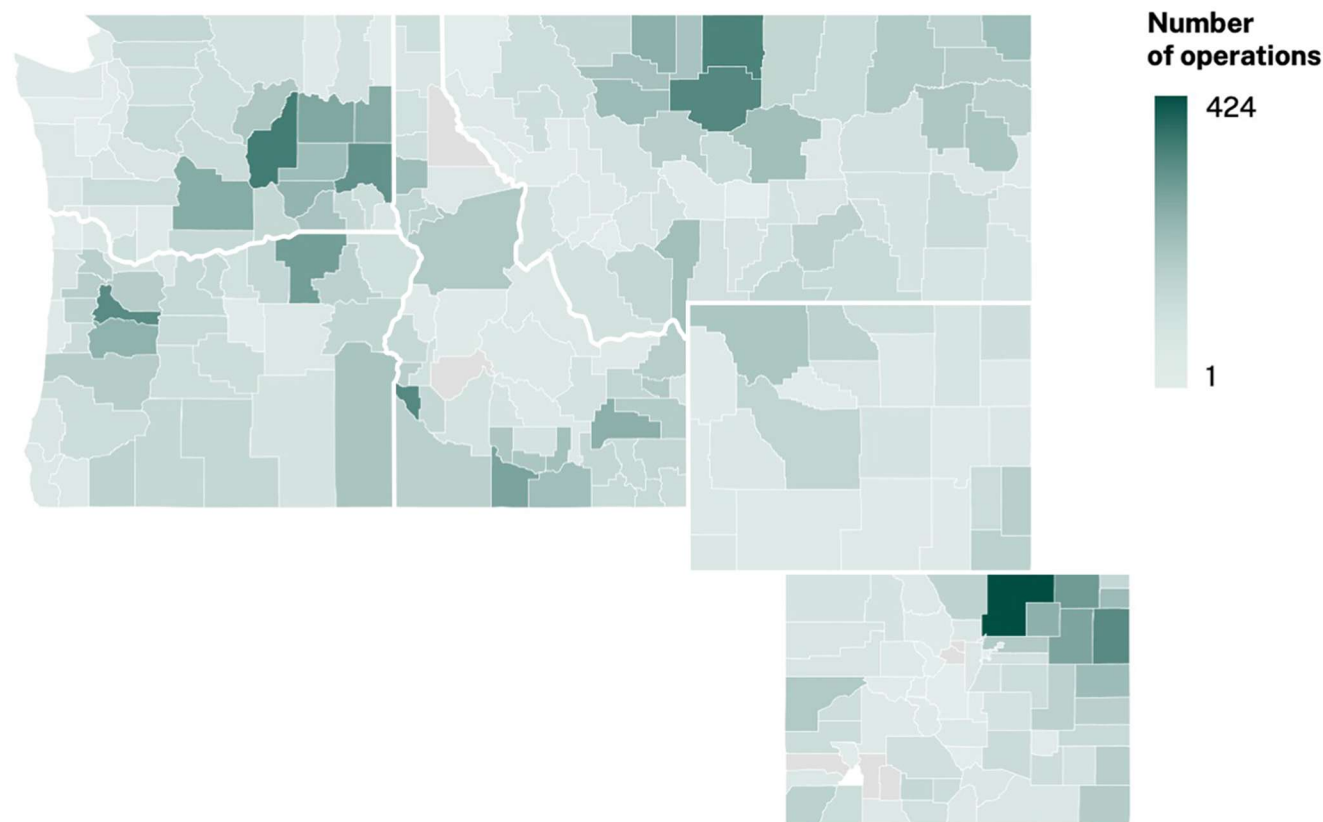


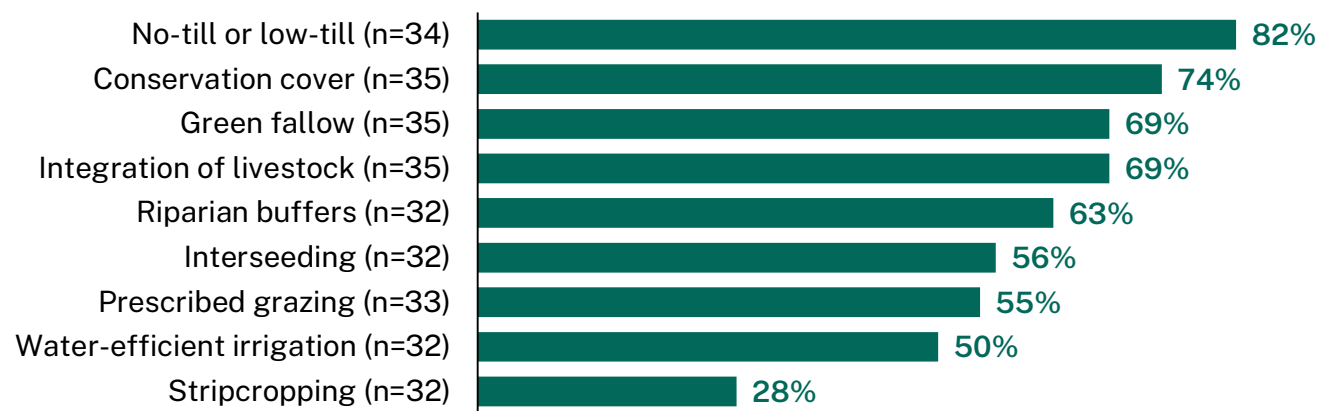
FIGURE 49 | Number of farms that practice precision agriculture in the service area by county, 2022



Practices farm and food business survey respondents are using and interested in using

The majority of farmer survey respondents who grow grains and pulses currently implement various conservation practices, including the six reported in the 2022 Census of Agriculture, along with additional practices such as riparian buffers and prescribed grazing (Figure 50).

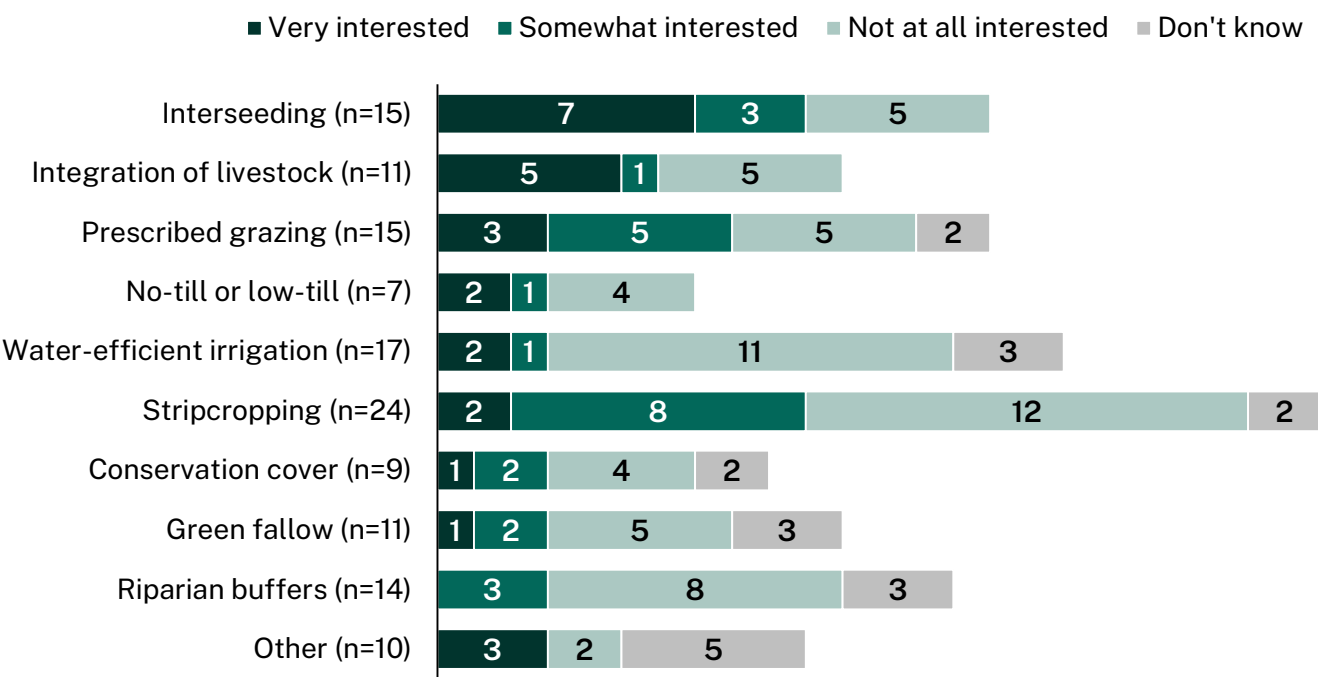
FIGURE 50 | Conservation practices used by farm business survey respondents



Other responses: Complex rotations, diverse crop rotations, long rotations (9 years), minimal synthetic inputs, pollinator-friendly habitat and farm practices, vermicomposting.

Figure 51 shows the level of interest farmer survey respondents have in adopting conservation practices they are not currently using. Interseeding and integrating livestock stood out as the practices that the largest number indicated being "very interested" in adopting, despite not currently using it.

FIGURE 51 | Conservation production practices farm business survey respondents are interested in using (if they are not already)



Other responses: Carbon sequestration, planting trees and hedgerows for erosion protection, precision agriculture techniques, wildlife habitat.

Producer characteristics

USDA NASS provided this definition of a producer for the 2022 Census:

For census purposes, the individual who was involved in decisions, or **producer**, is the person, such as a hired manager, business manager, or other person primarily responsible for the on-site, day-to-day operation of the farm or ranch business in 2022. This may have been accomplished by either doing the work or directly supervising the work. The producer may have worked land they owned, land rented for cash from others, acreage rented on a crop-share basis, land operated rent free, or land operated under a combination of several such arrangements.²

² https://www.nass.usda.gov/AgCensus/Report_Form_and_Instructions/2022_Report_Form/2022_Census_of_Agriculture_Report_Form_Guide.pdf

Table 26 shows the percentage of producers in each state by select demographic characteristics. The following sections provide an overview of the demographic characteristics by state and substate region.

TABLE 26 | Total number of producers and percentage of total producers by characteristic and state, 2022

Producer characteristics	Service area	CO	ID	MT	OR	WA	WY
Total count of producers	305,452	62,759	37,806	36,526	62,680	41,419	17,834
Female	41%	42%	42%	42%	46%	57%	43%
Military service, active duty now or in the past	10%	10%	9%	10%	10%	14%	9%
New/beginning (≤10 years)	31%	61%	61%	71%	65%	86%	68%
Young (<35 years old)	8%	8%	9%	7%	7%	7%	9%
Hispanic, Latino or Spanish Origin	4%	5%	3%	1%	3%	5%	2%
By single race category							
American Indian or Alaska Native	1%	1%	1%	3%	1%	1%	1%
Asian	0.7%	1%	0.3%	0.3%	1%	2%	0.1%
Black or African American	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.1%
Native Hawaiian or Other Pacific Islander	0.1%	0.1%	0.1%	0.0%	0.1%	0.3%	0.1%
Two or more races	1%	1%	1%	2%	1%	2%	1%

Women producers

As shown in Table 27, 41% of the 305,452 producers in the service area are women. Women producers collectively operate 87.2 million acres across the region. The percentage of women producers is similar across states and substate regions, with the lowest percent in Washinton's East Central Region (34%) and the highest in Oregon's Southwest and Washington's Western regions (46%). Oregon has the highest number of women producers, while Washington has the highest percentage of women producers. There are 16,448 women producers in Oregon's Northwest Region, the highest number among the substate regions. Figure 52 maps of the number of women producers in the service area by county.

Listed below are the substate regions with the highest number of producers who are women:

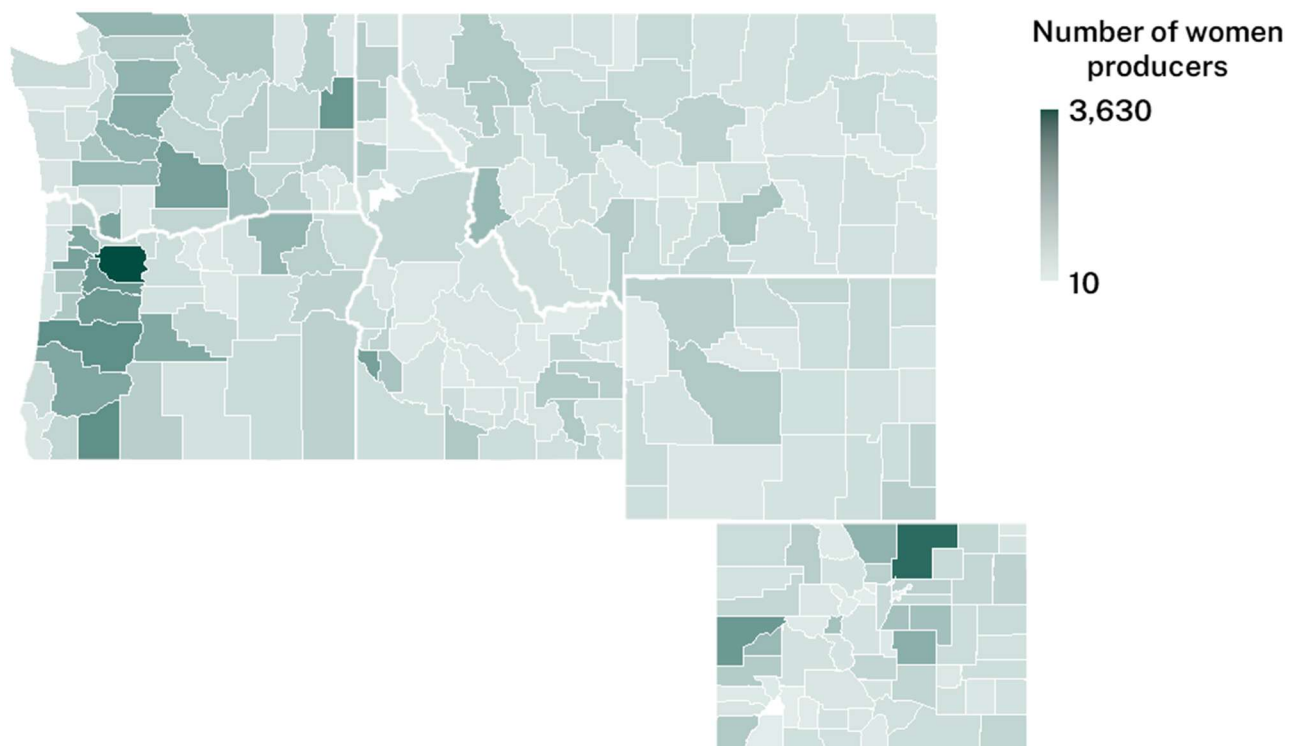
- Colorado's East Central region
- Idaho's East region
- Montana's Northwest region

- Oregon's Northwest region
- Washington's Western region
- Wyoming's Northwest region

TABLE 27 | *Number of producers, percentage of total producers, number of operations with producers, and acres operated by producers who are women by state and substate region, 2022*

		Women producers	Percent women	Number of operations	Acres operated
Colorado	Service area	126,465	41%	114,068	87,166,825
	Colorado total	27,746	41%	25,007	17,635,877
	East Central	7,259	42%	6,525	6,462,719
	Northeast	6,429	40%	5,820	2,396,835
	NW and Mountain	2,826	41%	2,520	2,025,644
	San Luis Valley	1,037	35%	911	709,691
	Southeast	3,340	40%	2,956	4,378,714
	Southwest	6,855	42%	6,275	1,662,274
Idaho	Idaho total	16,949	39%	15,634	6,186,588
	East	5,620	37%	5,129	2,741,267
	North	3,881	42%	3,565	1,072,920
	South Central	2,447	35%	2,244	1,180,600
	Southwest	5,001	42%	4,696	1,191,801
Montana	Montana total	17,830	40%	16,152	32,102,363
	Central	2,945	41%	2,652	6,084,688
	North Central	2,714	35%	2,434	7,120,802
	Northeast	1,922	36%	1,720	5,388,855
	Northwest	4,278	44%	3,970	1,273,186
	South Central	2,696	41%	2,458	3,699,762
	Southeast	1,380	39%	1,252	6,726,294
	Southwest	1,895	40%	1,666	1,808,776
Oregon	Oregon total	30,150	44%	27,100	9,089,817
	North Central	1,202	38%	1,067	1,821,236
	Northeast	2,891	42%	2,638	2,069,988
	Northwest	16,448	44%	14,808	997,468
	Southeast	4,740	44%	4,284	3,693,262
	Southwest	4,869	46%	4,303	507,863
Washington	Washington total	25,477	42%	22,747	6,813,521
	Central	5,273	39%	4,779	1,645,608
	East Central	2,611	34%	2,255	2,552,862
	Northeast	2,976	44%	2,713	701,149
	Southeast	1,813	38%	1,565	1,410,330
	Western	12,804	46%	11,435	503,572
Wyoming	Wyoming total	8,313	41%	7,428	15,338,659
	Northeast	1,961	42%	1,787	5,144,816
	Northwest	2,152	41%	1,951	1,523,276
	South Central	1,032	42%	896	3,485,335
	Southeast	2,093	41%	1,836	4,312,432
	West	1,075	40%	958	872,800

FIGURE 52 | *Number of women producers in the service area by county, 2022*



Producers with military service

As shown in Table 28, 10% of the 305,452 producers in the service area have military service, either active duty now or in the past. Those with military service collectively operate 20.2 million acres across the service area. Idaho's South Central region has the lowest percentage of producers with military service (6%) and Washington's Northeast region has the highest (14%). Figure 53 maps the number of producers with military service by county.

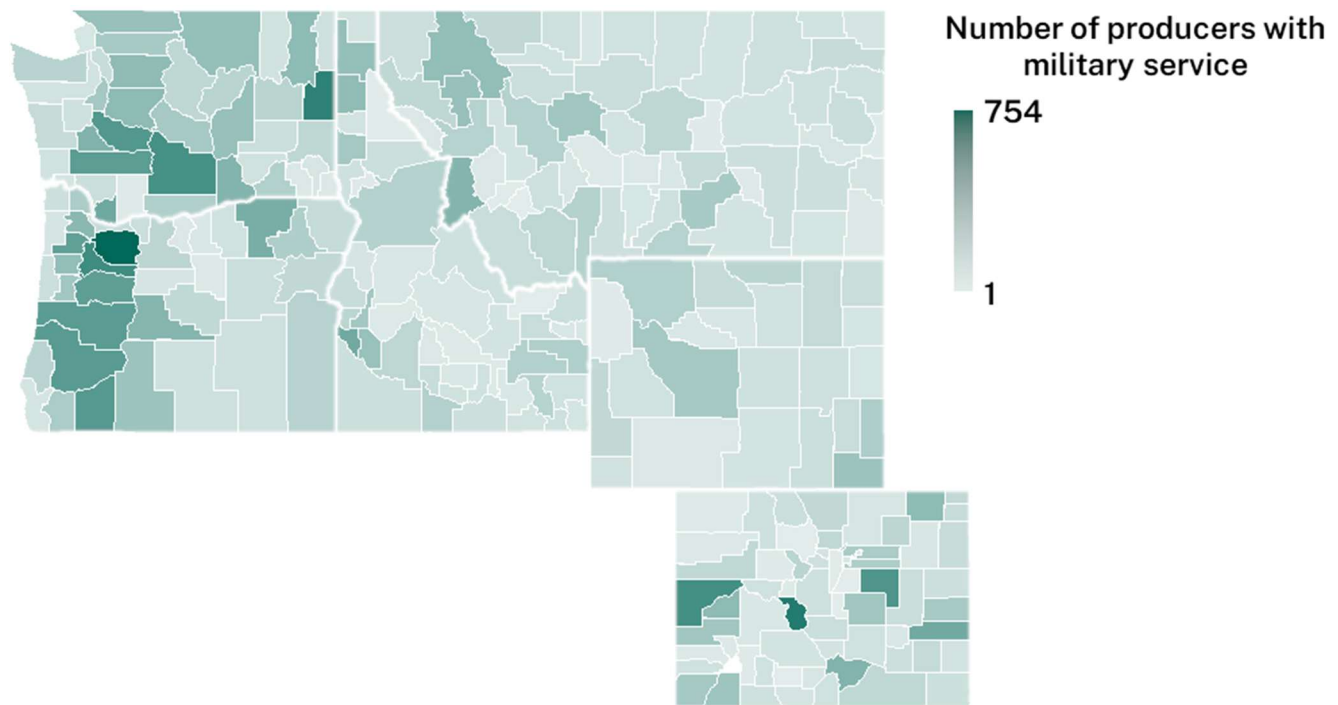
Listed below are the substate regions with the highest number of producers with military service, either active duty now or in the past:

- Colorado's East Central region
- Idaho's Southwest region
- Montana's Northwest region
- Oregon's Northwest region
- Washington's Western region
- Wyoming's Southeast region

TABLE 28 | *Number of producers, percentage of total producers, number of operations with producers, and acres operated by producers who have military service, either active duty now or in the past by state and substate region, 2022*

		Producers with military service	Percent with military service	Number of operations	Acres operated
	Service area	29,218	10%	27,537	20,203,007
Colorado	Colorado total	6,496	10%	6,125	4,108,971
	East Central	1,828	10%	1,720	1,530,836
	Northeast	1,382	9%	1,274	546,888
	NW and Mountain	537	8%	513	410,740
	San Luis Valley	242	8%	233	75,662
	Southeast	909	11%	857	926,920
	Southwest	1,598	10%	1,528	617,925
Idaho	Idaho total	3,662	8%	3,449	1,257,195
	East	1,064	7%	978	397,198
	North	1,042	11%	1,002	260,828
	South Central	402	6%	388	294,774
	Southwest	1,154	10%	1,081	304,395
Montana	Montana total	4,065	9%	3,858	7,155,161
	Central	619	9%	586	1,301,575
	North Central	556	7%	532	1,304,576
	Northeast	496	9%	451	1,228,430
	Northwest	1,153	12%	1,094	400,723
	South Central	602	9%	582	1,322,371
	Southeast	278	8%	268	1,133,579
	Southwest	361	8%	345	463,907
Oregon	Oregon total	6,691	10%	6,309	2,176,954
	North Central	283	9%	268	415,106
	Northeast	583	9%	565	329,773
	Northwest	3,575	10%	3,357	239,429
	Southeast	1,051	10%	996	1,069,581
	Southwest	1,199	11%	1,123	123,065
Washington	Washington total	6,471	11%	6,077	1,609,228
	Central	1,299	10%	1,229	465,663
	East Central	635	8%	600	537,016
	Northeast	968	14%	896	146,872
	Southeast	400	8%	379	302,362
	Western	3,169	11%	2,973	157,315
Wyoming	Wyoming total	1,833	9%	1,719	3,895,498
	Northeast	417	9%	382	1,287,706
	Northwest	479	9%	464	488,564
	South Central	184	7%	166	645,951
	Southeast	569	11%	537	1,358,097
	West	184	7%	170	115,180

FIGURE 53 | *Number of producers with military service either active duty now or in the past in the service area by county, 2022*



Producers by race

Table 29 displays producer data by race in the service area by state and substate region. Highlights from this data include the following:

- Washington's Western region has 75% of the 951 Asian producers in the state.
- Idaho's Southwest region has 14 of the 19 Black or African American producers in the state.
- Wyoming's Northwest region has 67% of the 173 American Indian or Alaska Native producers in the state.
- Oregon's Northwest region has 67% of the 616 Asian producers in the state.
- Oregon's Northwest region has 63% of the 99 Native Hawaiian or Other Pacific Islander producers in the state.

TABLE 29 | Number of producers and percent distribution of producers by race within a state by substate region, 2022. For example, 172 (34%) of Colorado's 503 American Indian or Alaska Native are in its Southwest substate region.

		American Indian or Alaska Native		Asian		Black or African American		Native Hawaiian or Other Pacific Islander		Two or more races	
		Count	%	Count	%	Count	%	Count	%	Count	%
Colorado	Service area	3,412	100%	2,202	100%	334	100%	398	100%	3,491	100%
	Colorado total	503	100%	359	100%	86	100%	86	100%	637	100%
	East Central	84	17%	109	30%	43	50%	33	38%	186	29%
	Northeast	77	15%	115	32%	14	16%	26	30%	121	19%
	NW and Mountain	31	6%	23	6%	1	1%	2	2%	34	5%
	San Luis Valley	28	6%	23	6%	1	1%	*	*	52	8%
	Southeast	111	22%	29	8%	10	12%	17	20%	87	14%
	Southwest	172	34%	60	17%	17	20%	8	9%	157	25%
Idaho	Idaho total	293	100%	144	100%	19	100%	42	100%	329	100%
	East	110	38%	42	29%	3	16%	9	21%	74	22%
	North	73	25%	30	21%	*	*	10	24%	93	28%
	South Central	19	6%	14	10%	2	11%	7	17%	21	6%
	Southwest	91	31%	58	40%	14	74%	16	38%	141	43%
Montana	Montana total	1,209	100%	117	100%	27	100%	18	100%	679	100%
	Central	41	3%	26	22%	2	7%	2	11%	100	15%
	North Central	537	44%	13	11%	7	26%	0	0%	139	20%
	Northeast	134	11%	15	13%	8	30%	1	6%	80	12%
	Northwest	251	21%	23	20%	7	26%	4	22%	185	27%
	South Central	172	14%	29	25%	3	11%	1	6%	77	11%
	Southeast	39	3%	10	9%	*	*	10	56%	48	7%
	Southwest	35	3%	1	0.9%	*	*	*	*	50	7%
Oregon	Oregon total	657	100%	616	100%	74	100%	99	100%	868	100%
	North Central	25	4%	70	11%	3	4%	2	2%	49	6%
	Northeast	88	13%	19	3%	3	4%	7	7%	81	9%
	Northwest	280	43%	412	67%	50	68%	62	63%	416	48%
	Southeast	128	19%	40	6%	9	12%	3	3%	121	14%
	Southwest	136	21%	75	12%	9	12%	25	25%	201	23%
Washington	Washington total	577	100%	951	100%	118	100%	133	100%	825	100%
	Central	197	34%	118	12%	20	17%	25	19%	220	27%
	East Central	25	4%	49	5%	8	7%	4	3%	44	5%
	Northeast	69	12%	48	5%	6	5%	11	8%	70	8%
	Southeast	13	2%	20	2%	6	5%	4	3%	28	3%
	Western	273	47%	716	75%	78	66%	89	67%	463	56%
Wyoming	Wyoming total	173	100%	15	100%	10	100%	20	100%	153	100%
	Northeast	28	16%	5	33%	4	40%	4	20%	24	16%
	Northwest	116	67%	3	20%	1	10%	*	*	88	58%
	South Central	10	6%	*	*	3	30%	2	10%	14	9%
	Southeast	15	9%	4	27%	2	20%	12	60%	25	16%
	West	4	2%	3	20%	*	*	2	10%	2	1%

Table 30 displays the distribution of producers by race and state. In the service area:

- Montana has the highest count and percentage of American Indian or Alaska native producers.
- Washington has the highest count and percentage of Asian, Black or African American, and Native Hawaiian or other Pacific Islander producers.
- Oregon has the highest count and percentage of producers reporting two or more races.

TABLE 30 | *Number of producers and percent distribution of producers by race by state, 2022. For example, 15% of the service area’s 3,412 American Indian or Alaska Native producers are in Colorado.*

	American Indian or Alaska Native		Asian		Black or African American		Native Hawaiian or other Pacific Islander		Two or more races	
	Count	%	Count	%	Count	%	Count	%	Count	%
Service area	3,412	100%	2,202	100%	334	100%	398	100%	3,491	100%
Colorado	503	15%	359	16%	86	26%	86	22%	637	18%
Idaho	293	9%	144	7%	19	6%	42	11%	329	9%
Montana	1,209	35%	117	5%	27	8%	18	5%	679	19%
Oregon	657	19%	616	28%	74	22%	99	25%	868	25%
Washington	577	17%	951	43%	118	35%	133	33%	825	24%
Wyoming	173	5%	15	1%	10	3%	20	5%	153	4%

Figures 54 through 58 map the number of producers by single race category and county.

FIGURE 54 | *Number of American Indian or Alaska Native producers in the service area by county, 2022*

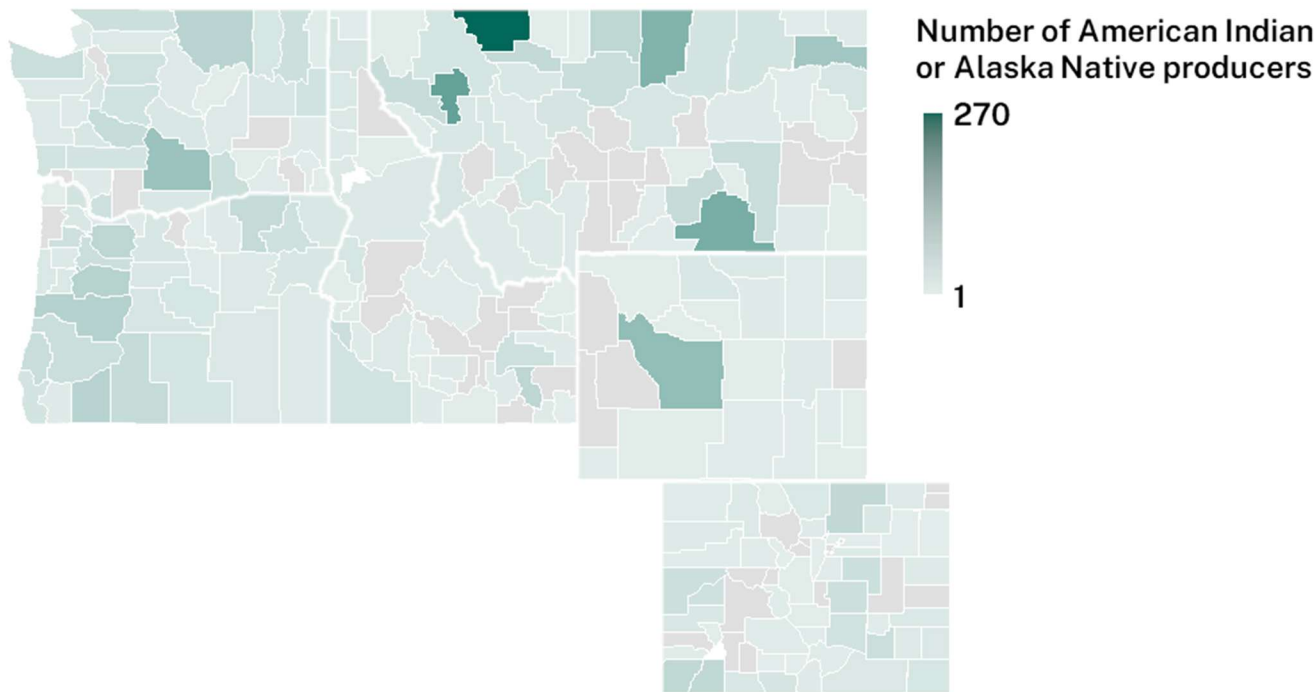


FIGURE 55 | *Number of Asian producers in the service area by county, 2022*

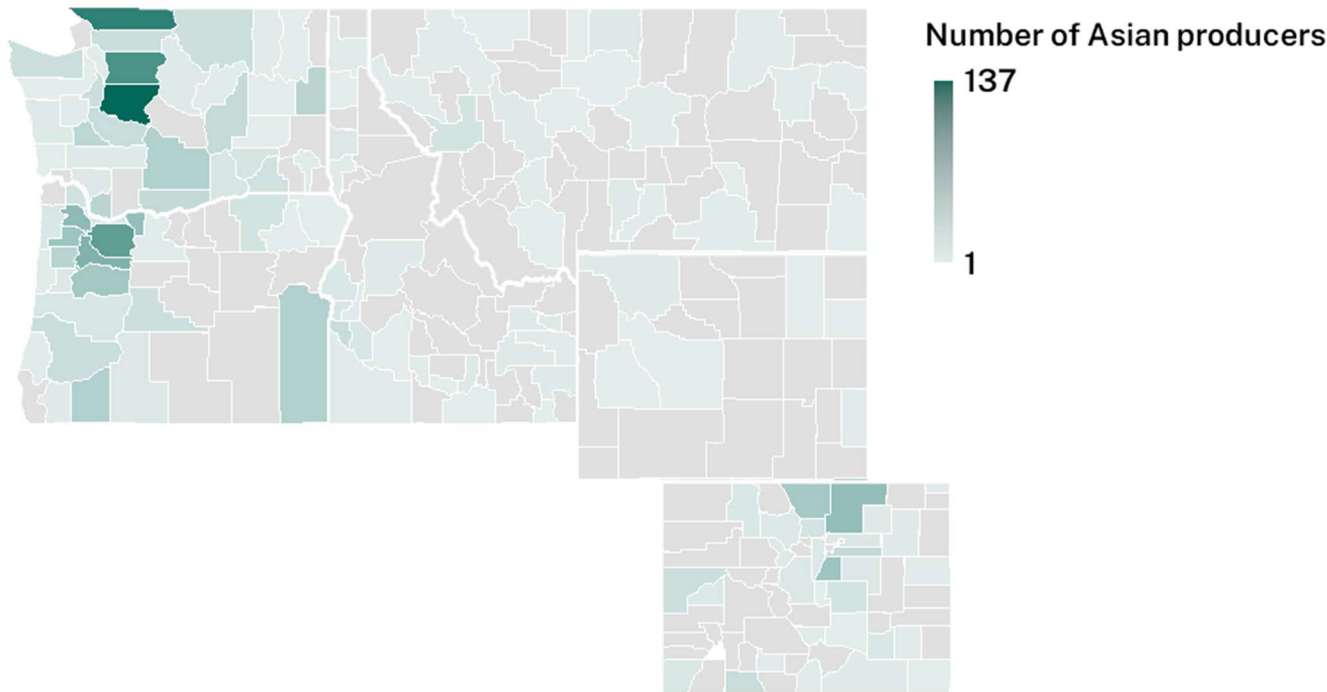


FIGURE 56 | *Number of Black or African American producers in the service area by county, 2022*

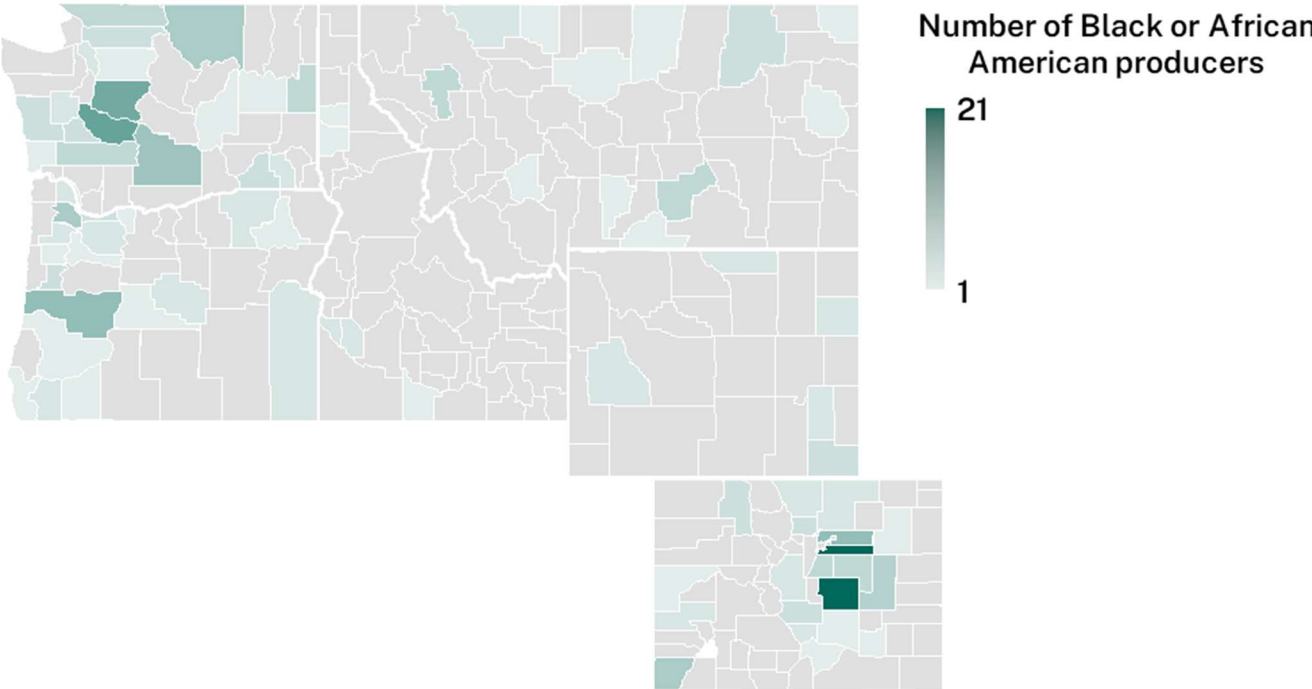


FIGURE 57 | *Number of Native Hawaiian or Other Pacific Islander producers in the service area by county, 2022*

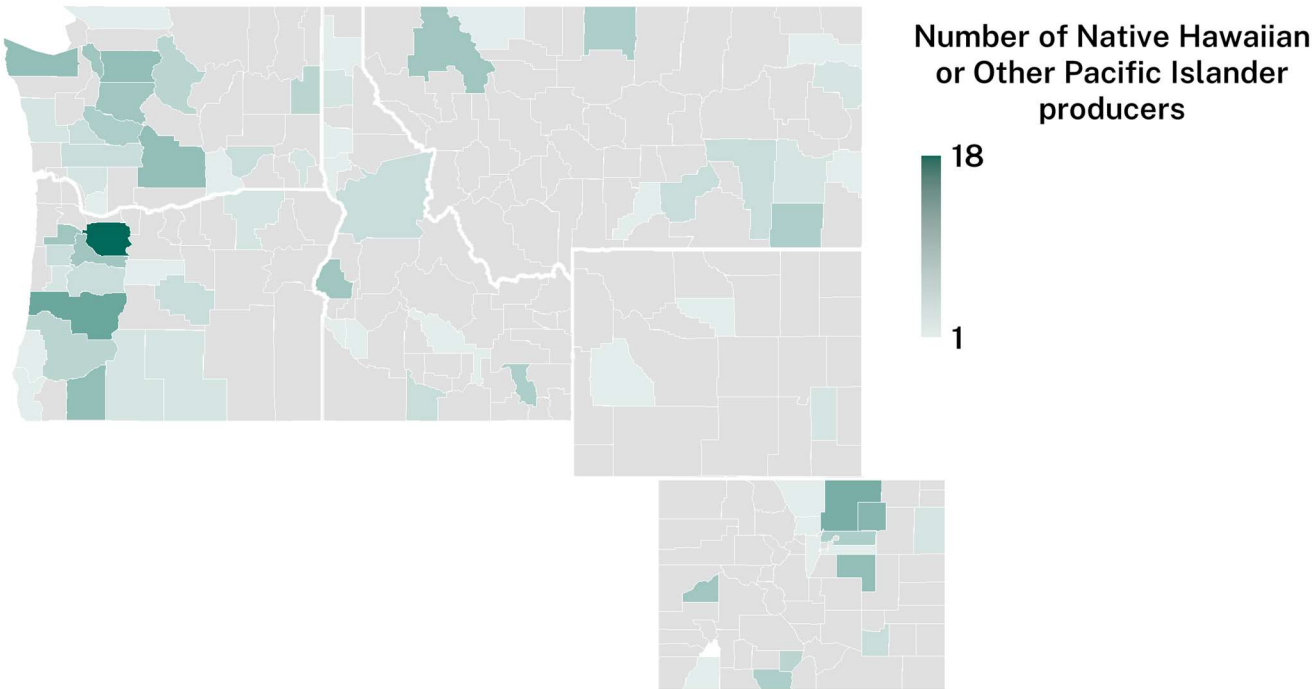
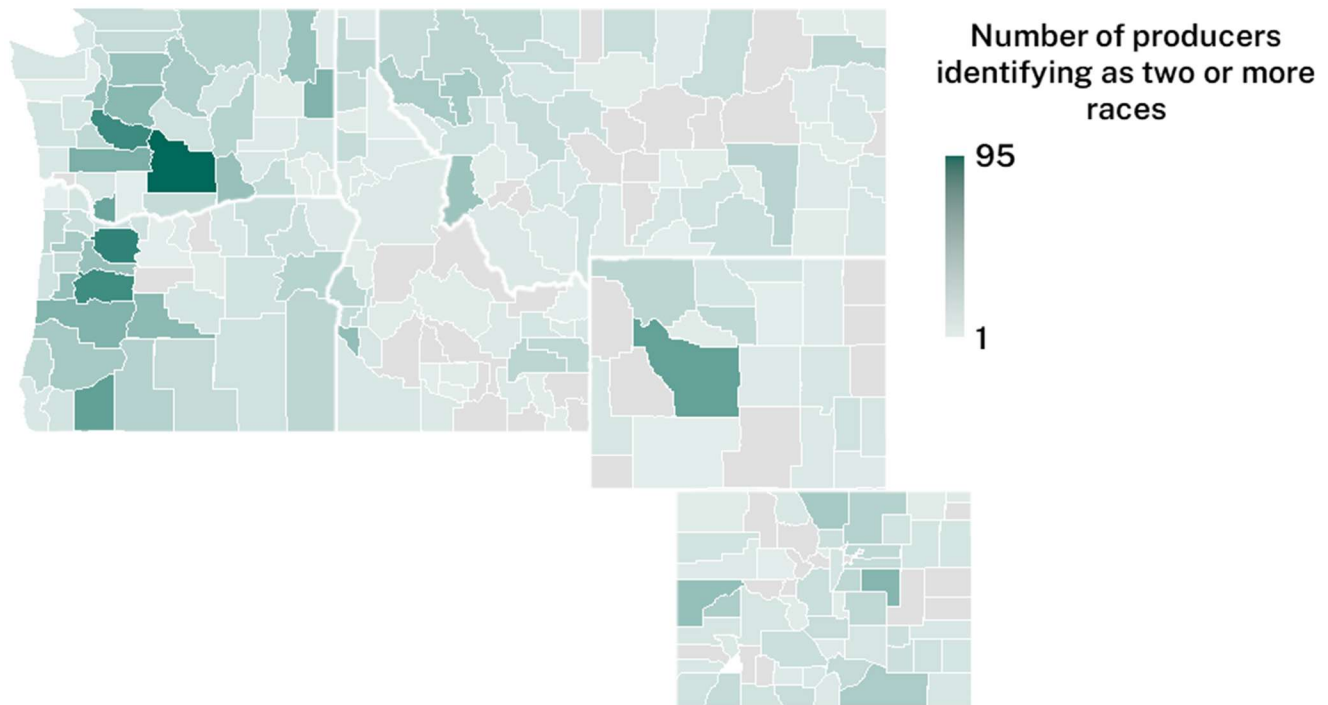


FIGURE 58 | *Number of producers identifying as two or more races in the service area by county, 2022*



Hispanic, Latino, or Spanish origin producers

As shown in Table 31, 4% of the 305,452 producers in the service area are Hispanic, Latino, or Spanish Origin. Collectively, Hispanic, Latino, or Spanish-origin producers operate 4.7 million acres across the six-state region. Twenty-five percent of producers in the San Luis Valley region in Colorado are Hispanic, Latino, or Spanish Origin, the highest percentage within the service area. By count, the highest concentration of Hispanic, Latino, or Spanish Origin producers is in Oregon's Northwest region (1,296) and Washington's Central region (1,259).

TABLE 31 | Number of producers, percentage of total producers, number of operations with producers, and acres operated by producers who are Hispanic, Latino, or Spanish Origin by state and substate region, 2022

		Hispanic, Latino, or Spanish Origin producers		Number of operations	Acres operated
		Count	%		
Colorado	Service area	10,952	4%	8,610	4,719,614
	Colorado total	3,637	5%	2,809	1,458,592
	East Central	692	4%	526	205,051
	Northeast	667	4%	560	260,292
	NW and Mountain	169	2%	144	126,076
	San Luis Valley	719	25%	463	397,664
	Southeast	558	7%	429	342,717
	Southwest	832	5%	687	126,792
Idaho	Idaho total	1,341	3%	1,091	516,829
	East	282	2%	233	84,499
	North	156	2%	142	23,325
	South Central	446	6%	322	191,650
	Southwest	457	4%	394	217,355
Montana	Montana total	526	1%	448	941,225
	Central	64	0.9%	60	72,097
	North Central	67	0.9%	61	159,412
	Northeast	75	1%	50	84,177
	Northwest	146	1%	137	9,042
	South Central	85	1%	71	75,639
	Southeast	53	1%	41	502,641
	Southwest	36	0.8%	28	38,217
Oregon	Oregon total	2,284	3%	1,849	528,277
	North Central	117	4%	87	26,669
	Northeast	178	3%	145	119,306
	Northwest	1,296	3%	1,022	103,163
	Southeast	297	3%	257	245,889
	Southwest	396	4%	338	33,250
Washington	Washington total	2,768	5%	2,083	455,928
	Central	1,259	9%	908	143,116
	East Central	520	7%	374	205,732
	Northeast	109	2%	91	4,631
	Southeast	61	1%	58	56,141
	Western	819	3%	652	46,308
Wyoming	Wyoming total	396	2%	330	818,763
	Northeast	73	2%	65	434,979
	Northwest	137	3%	108	130,157
	South Central	43	2%	39	62,298
	Southeast	112	2%	89	189,700
	West	31	1%	29	1,629

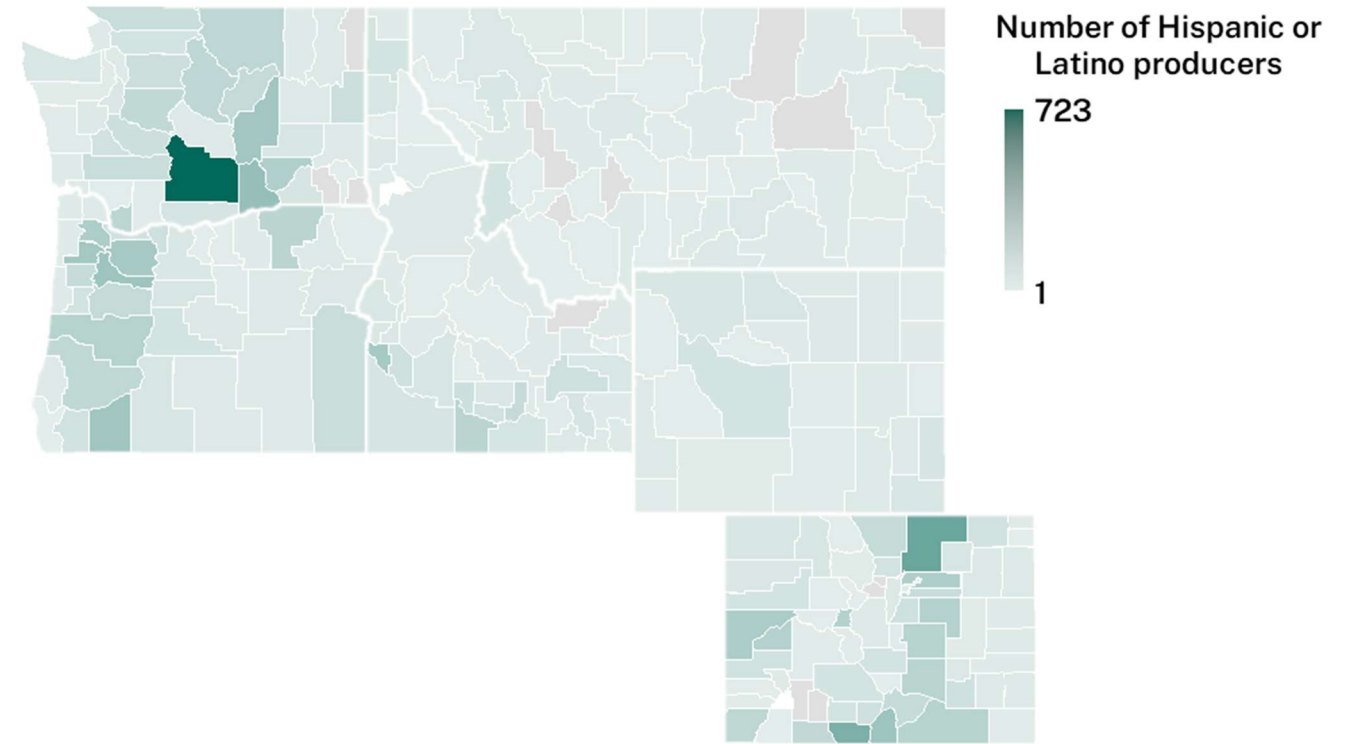
Table 32 displays the number and percent distribution of Hispanic, Latino, or Spanish Origin producers within the service area by state. Thirty-three percent of the service area’s 10,952 Hispanic, Latino, or Spanish Origin producers are in Colorado, followed by 25% in Washington, 21% in Oregon, 12% in Idaho, 5% in Montana, and 4% in Wyoming.

TABLE 32 | *Number of producers and percent distribution of producers within the service area by state who are Hispanic, Latino, or Spanish Origin, 2022.*

	Hispanic, Latino, or Spanish Origin producers	Percent distribution
Service area	10,952	100%
Colorado	3,637	33%
Idaho	1,341	12%
Montana	526	5%
Oregon	2,284	21%
Washington	2,768	25%
Wyoming	396	4%

Figure 59 maps the number of Hispanic, Latino, or Spanish Origin producers by county. Yakima County in Washington has the highest number (723) of Hispanic, Latino, or Spanish Origin producers.

FIGURE 59 | *Number of Hispanic, Latino, or Spanish Origin producers in the service area by county, 2022*



New and beginning producers

USDA defines a new or beginning farmer or rancher as anyone who has operated a farm or ranch for 10 years or less. They may be associated with farms that have producers who are not new or beginning farmers. There were 95,435 new and beginning producers in the service area in 2022 (Table 33). Nearly a third of all producers in the service area were new or beginning in 2022. Figure 60 maps the number of new and beginning producers in the service area by county.

Listed below are the substate regions with the highest number of new and beginning producers:

- Colorado's East Central region
- Idaho's East region
- Montana's Northwest region
- Oregon's Northwest region
- Washington's Western region
- Wyoming's Northwest region

FIGURE 60 | *Number of new and beginning producers in the service area by county, 2022*

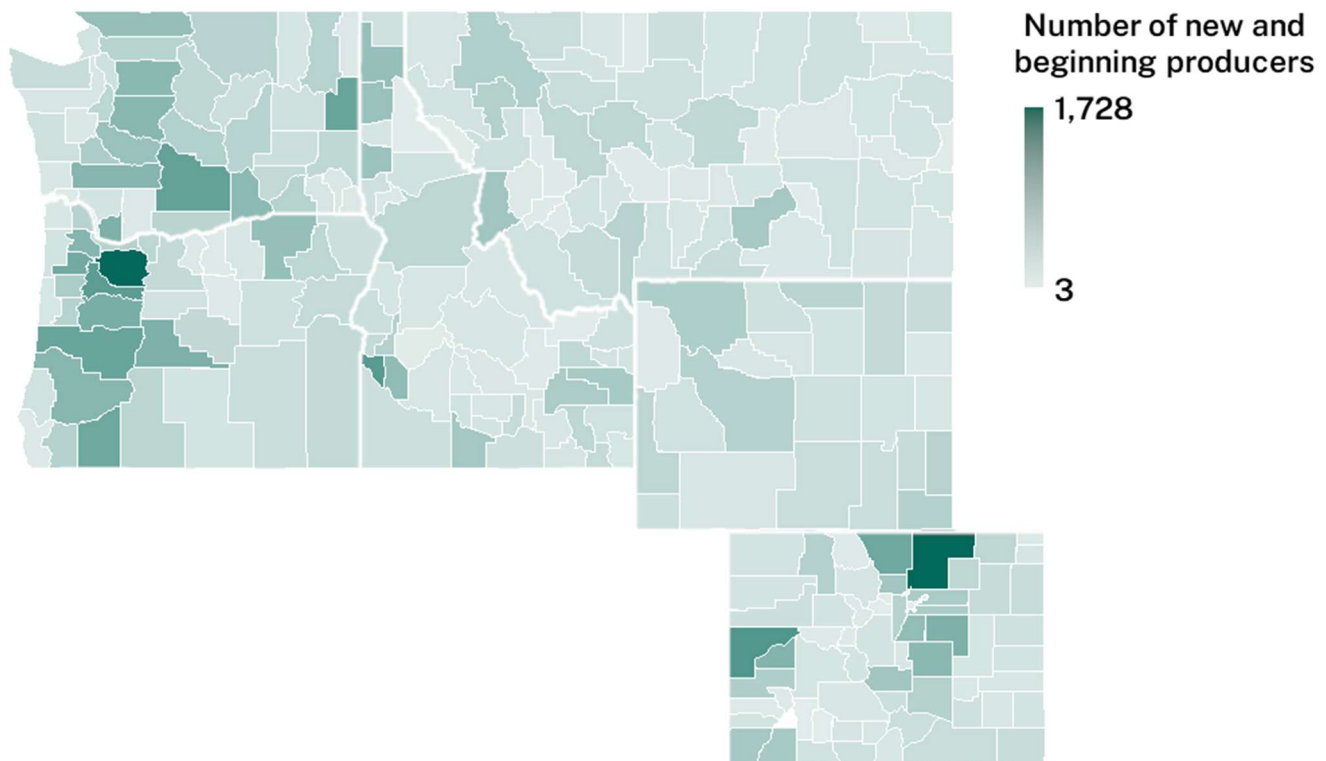


TABLE 33 | Number of producers, percentage of total producers, number of operations with producers, and acres operated by new and beginning producers by state and substate region, 2022

		New and beginning producers	Percent new and beginning	Number of operations	Acres operated
Colorado	Service area	95,435	31%	56,919	38,506,081
	Colorado total	24,166	36%	14,363	7,469,406
	East Central	6,493	37%	3,763	2,582,620
	Northeast	5,738	36%	3,387	1,230,837
	NW and Mountain	2,582	37%	1,543	1,082,137
	San Luis Valley	828	28%	515	252,438
	Southeast	2,635	32%	1,647	1,819,446
	Southwest	5,890	37%	3,508	501,928
Idaho	Idaho total	14,798	34%	8,702	2,736,291
	East	5,208	34%	3,018	1,167,338
	North	3,221	35%	1,876	538,333
	South Central	2,004	29%	1,226	606,226
	Southwest	4,365	37%	2,582	424,394
Montana	Montana total	11,724	26%	7,410	15,679,611
	Central	2,019	28%	1,239	2,848,440
	North Central	1,841	24%	1,249	3,560,134
	Northeast	1,338	25%	917	2,178,200
	Northwest	2,647	27%	1,625	658,208
	South Central	1,795	27%	1,093	3,138,219
	Southeast	801	22%	510	2,374,609
	Southwest	1,283	27%	777	921,801
Oregon	Oregon total	21,898	32%	12,820	3,594,574
	North Central	809	26%	513	667,296
	Northeast	1,979	29%	1,206	815,950
	Northwest	11,879	32%	6,880	440,240
	Southeast	3,527	33%	2,066	1,458,799
	Southwest	3,704	35%	2,155	212,289
Washington	Washington total	17,355	29%	10,242	2,930,090
	Central	3,609	27%	2,202	868,090
	East Central	1,654	22%	1,054	1,014,723
	Northeast	2,131	31%	1,207	239,315
	Southeast	1,136	24%	708	576,184
	Western	8,825	32%	5,071	231,778
Wyoming	Wyoming total	5,494	27%	3,382	6,096,109
	Northeast	1,252	26%	771	1,982,770
	Northwest	1,412	27%	854	930,092
	South Central	771	31%	464	1,196,435
	Southeast	1,377	27%	854	1,588,680
	West	682	26%	439	398,132

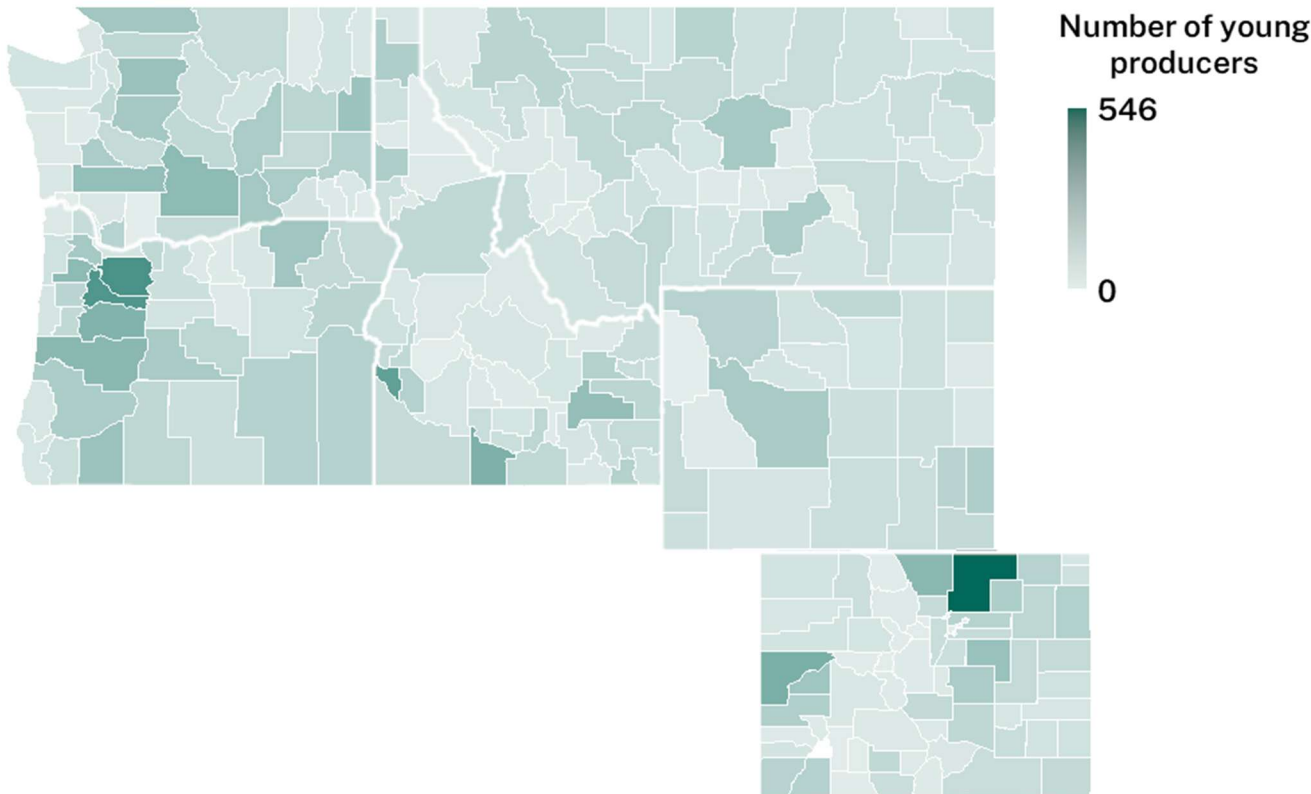
Young producers

USDA NASS defines a “young producer” as a producer under 35 years old. As shown in Table 34, 8% of the 305,452 producers in the service area are young producers. Figure 61 maps the number of young producers in the service area by county.

TABLE 34 | Number of producers, percent of producers, count of operations, and acres operated by producers under 35 years old in the service area by state and substate region, 2022

		Young producers	Percent young producers	Number of operations	Acres operated
	Service area	23,064	8%	17,305	19,642,238
Colorado	Colorado total	5,439	8%	4,061	3,444,703
	East Central	1,266	7%	953	1,126,210
	Northeast	1,339	8%	1,015	701,788
	NW and Mountain	587	8%	426	493,237
	San Luis Valley	336	11%	241	153,021
	Southeast	583	7%	444	692,585
	Southwest	1,328	8%	982	277,862
Idaho	Idaho total	3,859	9%	2,826	1,468,931
	East	1,493	10%	1,099	568,248
	North	634	7%	476	228,670
	South Central	700	10%	507	404,581
	Southwest	1,032	9%	744	267,432
Montana	Montana total	3,104	7%	2,343	7,368,899
	Central	650	9%	464	1,289,961
	North Central	734	9%	589	2,143,346
	Northeast	445	8%	354	1,536,265
	Northwest	*	*	*	*
	South Central	558	8%	427	1,026,362
	Southeast	296	8%	202	787,034
	Southwest	421	9%	307	585,931
Oregon	Oregon total	4,899	7%	3,709	1,970,817
	North Central	186	6%	164	309,234
	Northeast	579	8%	427	404,896
	Northwest	2,692	7%	1,985	293,423
	Southeast	758	7%	592	858,626
	Southwest	684	6%	541	104,638
Washington	Washington total	3,930	7%	2,998	1,786,819
	Central	823	6%	682	723,696
	East Central	560	7%	431	566,797
	Northeast	403	6%	298	120,106
	Southeast	278	6%	210	263,701
	Western	1,866	7%	1,377	112,519
Wyoming	Wyoming total	1,833	9%	1,368	3,602,069
	Northeast	414	9%	297	1,108,976
	Northwest	483	9%	381	501,603
	South Central	308	12%	223	816,992
	Southeast	440	9%	325	984,643
	West	188	7%	142	189,855

FIGURE 61 | Number of young producers in the service area by county, 2022



Farm and food business survey respondents' experience, scale, and demographic characteristics

Farm and food business survey respondents represented a range in terms of business experience and scale: 52% have 10 years of business experience or less (Figure 62), 60% employ four or fewer people (Figure 63), those with farms or ranches represent a range of acres operated (Figure 64), and respondents also represent a variety of scales in terms of gross revenue (i.e., revenue before expenses) in 2023 (Figure 65).

FIGURE 62 | Number of years farm and food business survey respondents said their business has been in operation (n=56)

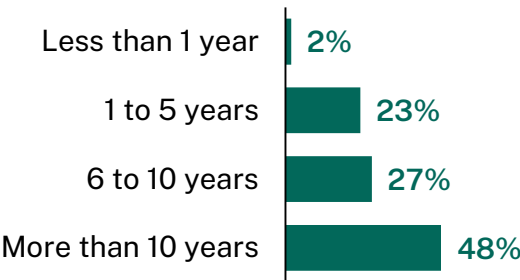


FIGURE 63 | Number of people employed by survey respondents' food and farm businesses (n=52)

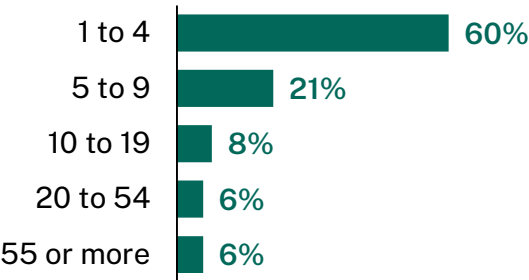


FIGURE 64 | Number of acres farmed or ranched by survey respondents (n=39)

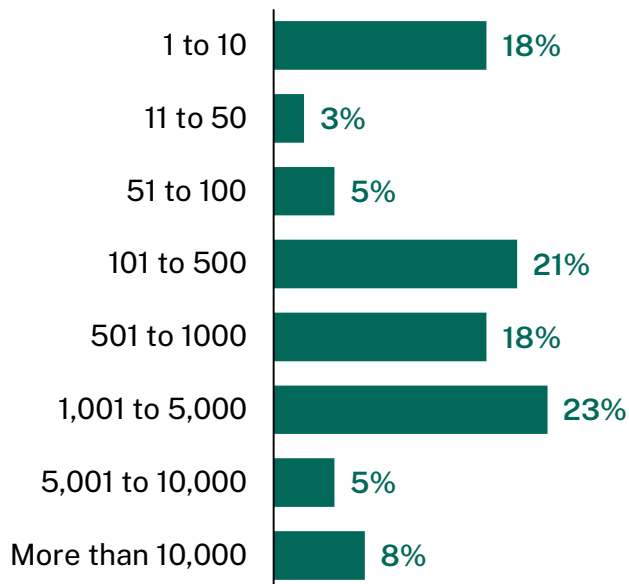
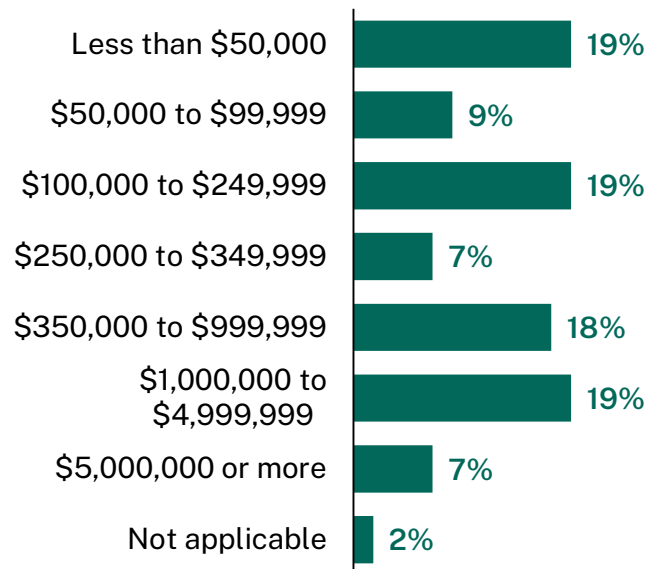
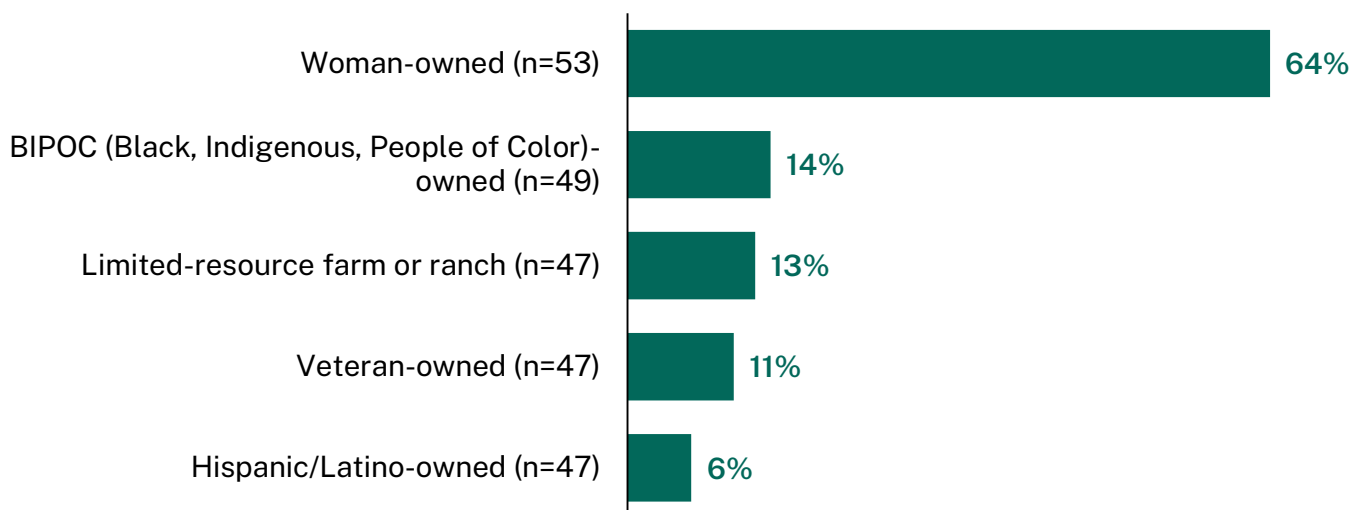


FIGURE 65 | Approximate gross revenue of farm and food survey respondents' businesses in 2023 (n=57)



The farm and food business survey asked respondents if their business fits into several historically underserved or socially disadvantaged demographic categories (Figure 66). Notably, 64% of respondents said their business is women-owned and only 6% said their business is Hispanic/Latino-owned.

FIGURE 66 | Historically underserved groups that farm and food business survey respondents represent



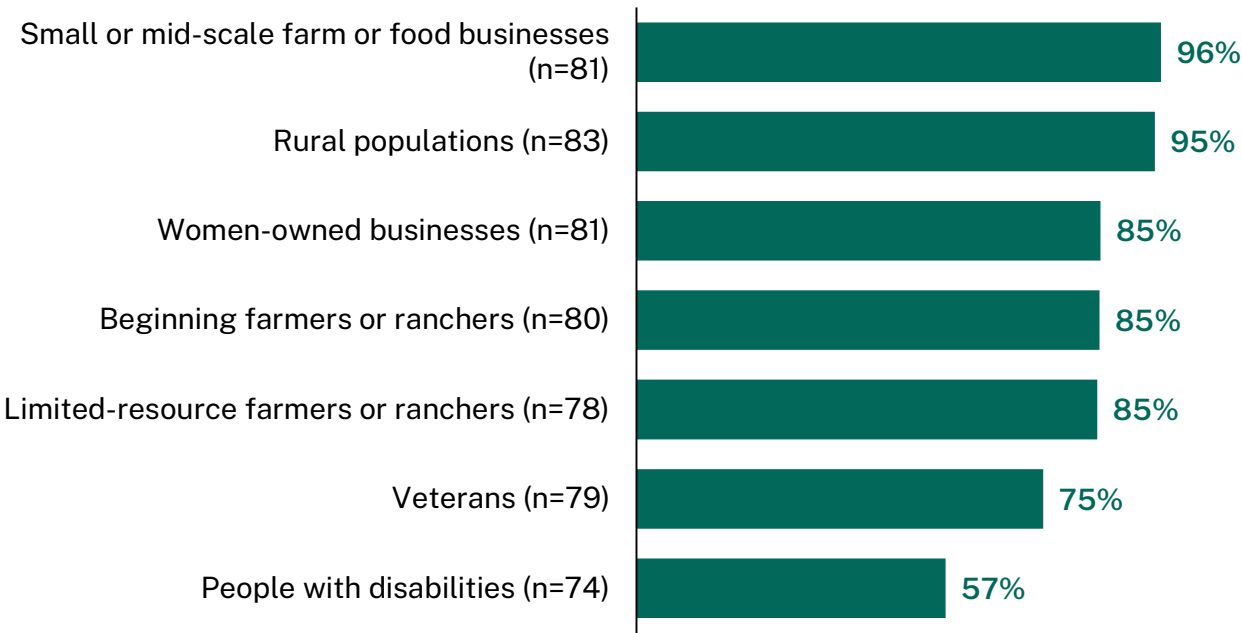
Populations TA providers are serving

A goal of the Center is to support underserved farm and food businesses. Therefore, the survey asked TA providers if their organization focuses on serving select audiences. Table 35 summarizes the number of respondents who said their organization focuses on serving select populations by population type and state. Figure 67 displays the percentages for all TA provider respondents in all states. A majority of TA respondents said their organization focuses on serving all the historically underserved populations we asked about.

TABLE 35 | *Count of technical assistance provider survey respondents whose organization serves specific populations of farm and food businesses, by state*

	CO	ID	MT	OR	WA	WY
Beginning farmers or ranchers (n=80)	14	23	24	23	28	17
Limited-resource farmers or ranchers (n=78)	13	22	22	22	28	14
People with disabilities (n=74)	8	15	15	12	18	8
Rural populations (n=83)	15	25	30	23	29	18
Small or mid-scale farm or food businesses (n=81)	16	28	29	26	31	17
Veterans (n=79)	9	20	21	16	25	9
Women-owned businesses (n=81)	11	23	24	20	27	12

FIGURE 67 | *Percent of TA provider survey respondents who said their organization focuses on serving businesses led by people from select populations. Respondents could select multiple answers.*

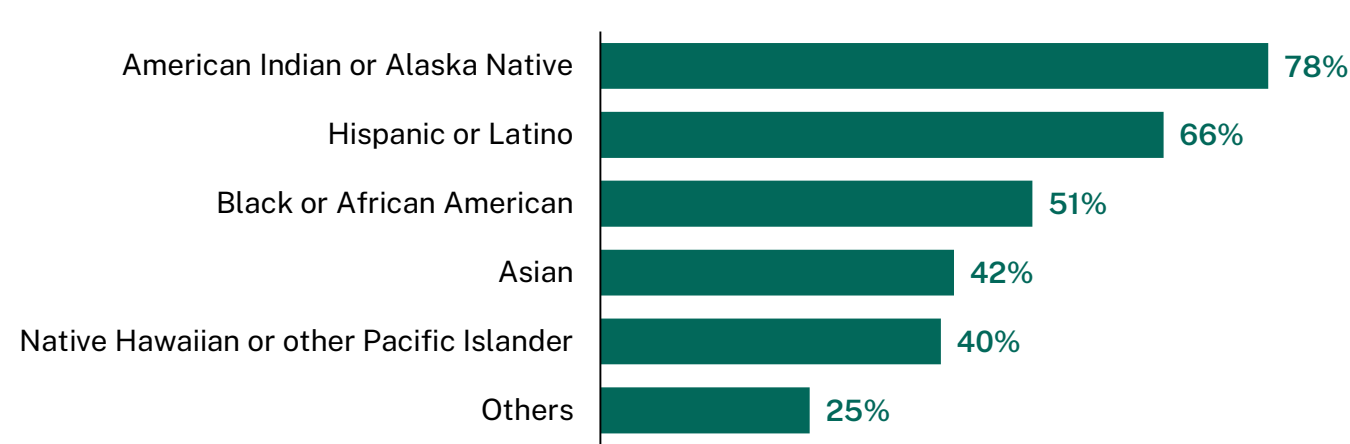


The survey also asked respondents if their organization focuses on serving businesses led by people in specific racial or ethnic groups. Table 36 lists the number of respondents in each state who said their organization focuses on serving specific groups, and Figure 68 displays the percentages. Seventy-eight percent of respondents said their organization focuses on serving businesses led by American Indian or Alaska Natives, followed by Hispanic/Latino (66%) and Black/African American (51%).

TABLE 36 | *Number of TA provider survey respondents whose organizations focus on serving businesses led by people from specific racial or ethnic groups, by state (n=65)*

	CO	ID	MT	OR	WA	WY
American Indian or Alaska Native	9	17	22	12	21	10
Asian	4	10	10	9	12	4
Black or African American	6	13	11	10	14	6
Hispanic or Latino	10	16	16	15	18	9
Native Hawaiian or other Pacific Islander	3	9	9	8	13	4
Others	5	5	5	8	7	5

FIGURE 68 | *Percentage of TA provider survey respondents whose organizations focus on serving businesses led by people from specific racial or ethnic groups. Respondents could select multiple answers (n=65)*



Key informant interviewees affiliated with Tribes had suggestions for how the Center can best support Native farm and food businesses, including building and strengthening partnerships with Tribes, Tribal entities, and organizations by and for Native people and supporting Tribes’ efforts to protect culturally important first foods and traditional knowledge:

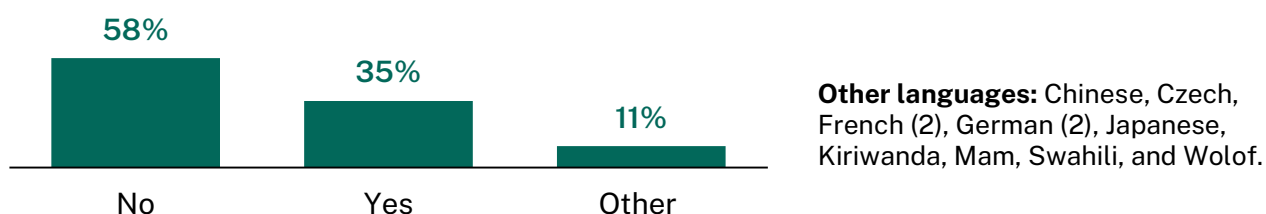
“I think organizations and institutions tend to shy away from tribal stuff sometimes because they're worried about overstepping. But in my mind, I think it's important for them to show up and build those relationships and be partners and...**make relationships that might need**

mending. So, I don't want to tell them to stay out of anything. If anything, no, be more a part of it and provide more resources because it's needed." -Key informant interviewee

"One of the things that is very much protected and that I think speaking on behalf of the Tribe that we would not like to see out there is information and knowledge...about some of our traditional foods and medicines. And I know that a lot of people will get that, a lot of like, 'well, what is this step?' And we'll tell them what the native name is. 'Well, where do you get it? How do you use it? What is it for?' So that's information that is not to be shared because it has been taken advantage of in the past. And so, I think that having them not ask for or share that knowledge would probably be **what the Tribe...our elders and leaders would want, is not to have our indigenous information shared with everybody** that's very internal." -Key informant interviewee

Survey respondents were also asked if their organization offers TA/resources in Spanish or another language other than English. Thirty-five percent said their organization offers assistance and resources in Spanish, and 11% said they offer support in other languages (Figure 69).

FIGURE 69 | *Thirty-five percent of technical assistance provider survey respondents' organizations offer technical assistance and/or resources in Spanish and 11% offer support in other languages beyond English and Spanish (n=80)*



TA PROVIDERS' RECOMMENDATIONS FOR REACHING UNDERSERVED AUDIENCES

The technical assistance provider survey respondents were asked, "Do you have suggestions for how the Northwest and Rocky Mountain Regional Food Business Center can help ensure the historically underserved farm and food businesses in your service area have access to programs and services?" Table 37 summarizes primary themes from open-ended responses. Appendix B includes all unedited responses to this question. A common theme is wanting programs, such as grant opportunities, to be better promoted and communicated to technical assistance providers so they can offer the opportunities to their clients. It was also important to technical assistance providers that the Center have a "boots on the ground" approach in communities, to increase their visibility and trust. Many commented that partners and resources are available for the Center to support and leverage and that farm and food businesses need navigation support to access the resources that pertain to them.

TABLE 37 | Primary themes from TA survey respondents on how the Center can help ensure programs are accessible to underserved businesses (n=62)

Theme	Summary	Example quote(s)
Awareness of programs	<i>Help promote and build awareness of available programs</i>	"Better program visibility."
		"Please share any opportunities with us that are relevant for us to share out in our network."
		"Outreach and work with partners to promote services."
		"Need more information on services and capacity."
Collaboration and partnerships	<i>Work with established organizations doing the work in communities</i>	"Develop trust and relationships with the organizations that are specific to priority demographic groups."
		"Engage with the local organization that is providing assistance to these farms and food businesses."
		"Partner with the people in the community already doing the work who live and are already connected to those underserved businesses."
		"Yes, partner with us and local place-based organizations doing the work and help with resources and added capacity."
Direct resources to organizations	<i>Provide funding to trusted TA providers</i>	"Fund community organizations led by historically underserved farm and food businesses to provide technical assistance to their communities. Provide TA first to those communities to assist in preparing strong applications for funding opportunities."
		"Spend a lot of time figuring out who are trusted, local partners. Do not listen to organizations themselves that say they are. Vet organizations to find out who is actually trusted and who has deep local relationships. Drive resources (\$\$!) to the organizations who are ALREADY doing this good work and help them do it even more. Pay local people to reach out and find new businesses to connect them to what you are doing."
		"I don't know that we need to increase these services, and there are so many out there. Rather, what I think is more important is that these service providers be funded for their work in a consistent and reliable way and that we develop better navigation around these services for businesses looking for support."

Theme	Summary	Example quote(s)
On-the-ground work	<i>In-person work embedded in communities</i>	"Traveling to where people are. Adaptability to different communications based on where folks are and what they need, e.g. Not everyone checks email. Being prepared to hear what on the ground needs are. Stipends or travel funds to participate."
		"Visit and meet them. Build trust. In person goes a long way with farmers and ranchers in general."
		"There is no one on the ground here trying to connect to them. There is so much work to be done in rural central Montana."
		"On the ground contacts, as locally focused as possible."

CHALLENGES REACHING UNDERSERVED AUDIENCES

Technical assistance provider interviewees were asked, "Are there certain populations you have had difficulty reaching? Why are they difficult to reach and what would help connect you to them?" Table 38 summarizes the primary challenges mentioned in their responses by theme. Common barriers to reaching clients include lack of organizational capacity, geographic challenges, language barriers, lack of internet access, and lack of trust in technical assistance providers.

TABLE 38 | *Technical assistance provider interviewee perspectives on barriers to successful outreach (n=28)*

Theme	Example quote(s)
Capacity	"We need more people...And even the money is out there if the people are there to write the grants and manage them and implement them. It's just more people involved in agricultural sort of business support. And especially in that minority or underserved population area, we've all sort of had a reckoning where we need to do better. We're always realizing we're not doing enough and yet people's plates are full. So, it's like you have to drop things and reprioritize. So just adding more resources is kind of the way to do that. But it just takes time and we're all kind of limited, I guess."
Geography and rural communities	"I think if we were to talk to the network, each of them would say there's still a gap of outreach, but sometimes that gap isn't necessarily from who the people are. It's about <i>where</i> they are. Just our state is so rural and remote by nature, sometimes it just doesn't get translated a hundred miles north of where they're located. I mean, it's normal for [us] to drive an hour or one way to visit with a client."

Theme	Example quote(s)
Internet and technology access	"Technology is a consistent barrier that we can name and point to, whether it's reliable internet access or computer literacy or computer objection. There's definitely a preference for the stakeholders that we're engaging for the printed materials and for the in-person engagement opportunities."
Language	"I think the Spanish services are what's needed in our community from a small business perspective. And so, it's kind of across the board, bookkeeping from accounting to legal services to web development, hosting, you name it." "I think if we had a more robust Spanish language component in our program center that we would get more clients who are Spanish speaking, we get a few. But I think, generally speaking, those clients are finding their assistance through other channels, whether it's through Ventures or Centro de La Raza. And that's fine because everybody needs clients and clients need help from everybody. But it would be nice if we were able to offer that support as well instead of having to refer people out because people don't like getting passed around when they find someplace that they want to get help. It's nice to be able to give them that help."
Trust	"There are constraints reaching Black producers in the west. I did do an outreach to a Black farmers index to offer our resources and got shut out actually, which was surprising to me...But that particular group, and I think this speaks to other bigger issues that have nothing to do with meat production...or with nonprofits. I think it's really a cultural hindrance where there is a lack of trust. And I think a lot of non-white organizations have this fear of the savior complex and being tokenized or being used for data reporting." "I feel like when it comes to Indian country, it's a gap in trust and relationships. I think there's just been enough burning of bridges and relationships that it makes people really apprehensive and sometimes they just want to be left alone and there's people pushing and, 'oh, you want this? Well, you have to jump through these 10 hoops before we can.' It is just too much, too complicated, and it's hurt relationships."

Creating diverse markets for climate-resilient ag

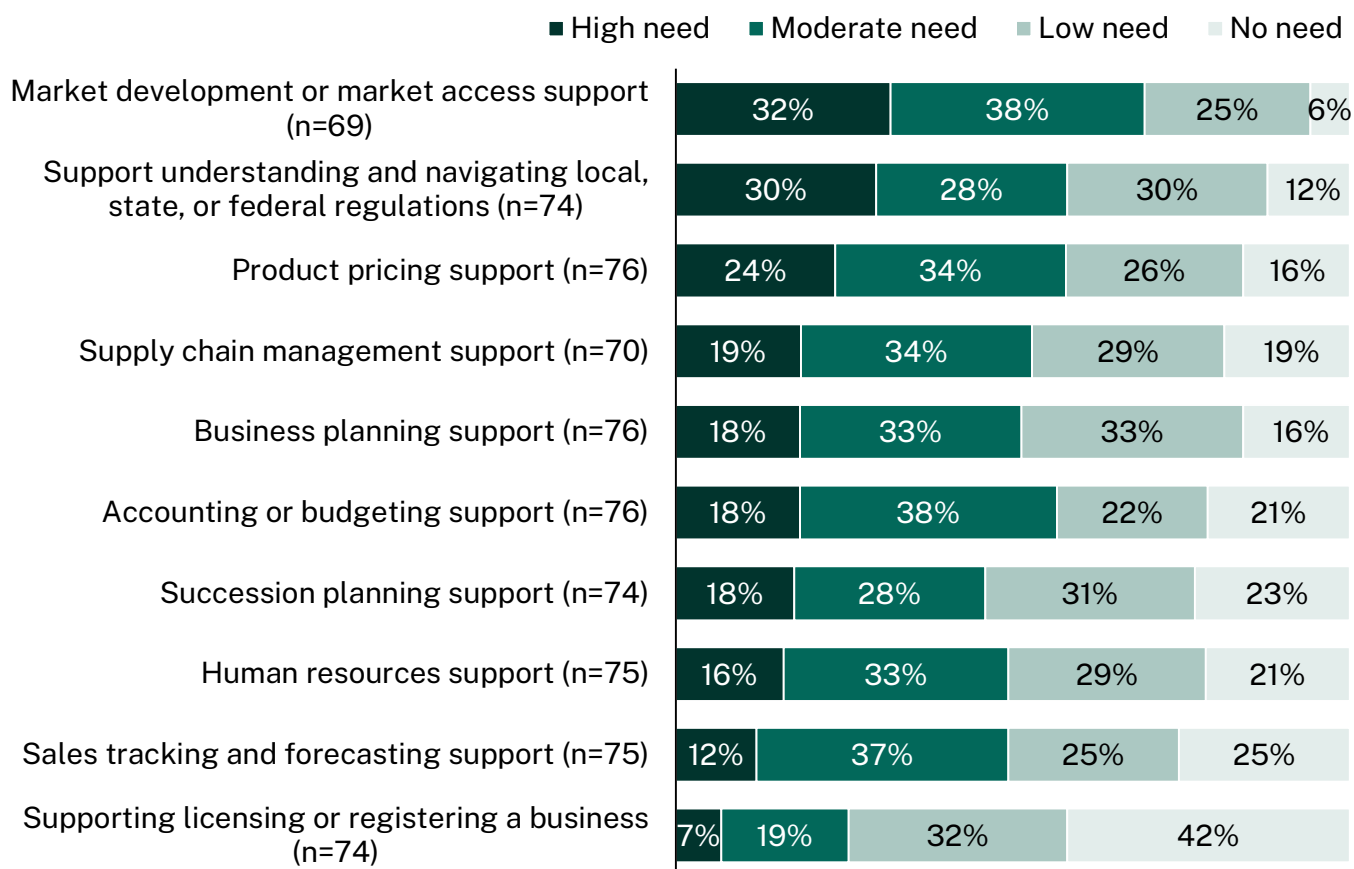
In this section, we summarize data related to marketing, market development, and general business development needs.

Business development and general topics

FARM AND FOOD BUSINESS SURVEY RESULTS

We asked farm and food business survey respondents to assess their need for certain types of general business development support (Figure 70). The majority have some level of need for all the support we asked about. The most frequently cited “high need” areas include market development and market access support (32%), support with navigating regulations (30%), and product pricing support (24%). Three-quarters of respondents or more said they have some level of need for all the types of support we asked about except for support licensing or registering a business, for which 42% said they have no need.

FIGURE 70 | *Technical assistance needs of farm and food business survey respondents that grow or process grains, pulses, and other field crops*



TA PROVIDER SURVEY RESULTS

We also asked TA provider survey respondents about the types of general business development, supply chain, and market support they provide. They offer a range of marketing and distribution technical assistance, with the most provided services including marketing development support (83%), supply chain management support (58%), and value-added processing support (56%) (Figure 71).

The survey asked TA providers to list one to three technical assistance priorities the Center should invest in to strengthen business viability and overcome barriers to market access and expansion for climate-resilient grains and pulses in their service area. Figure 72 and Table 39 summarize the primary topics and themes from their responses. A full list of responses is available in Appendix B.

FIGURE 71 | *Percentage of technical assistance provider survey respondents that provide various support services*

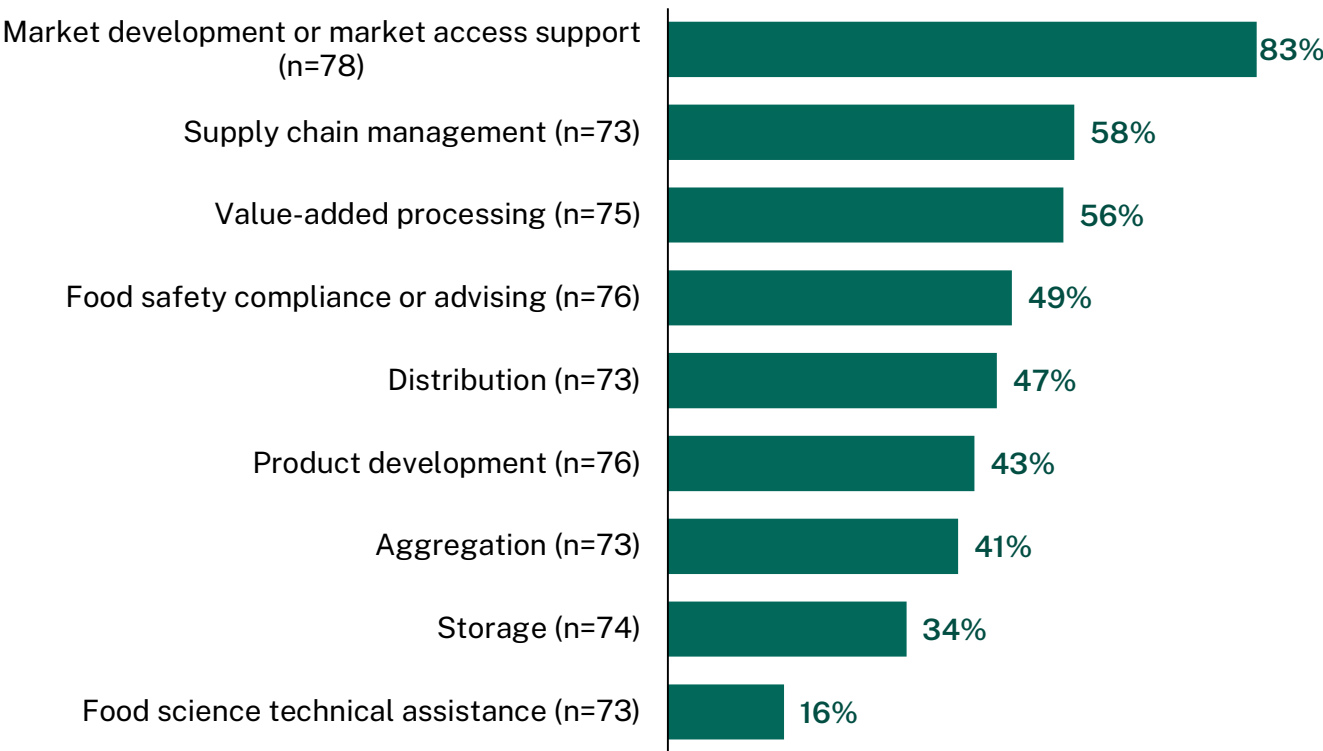


FIGURE 72 | *Percentage of TA survey respondents who included select topics in their assessment of TA priorities for climate-resilient grains and pulses (n=36)*

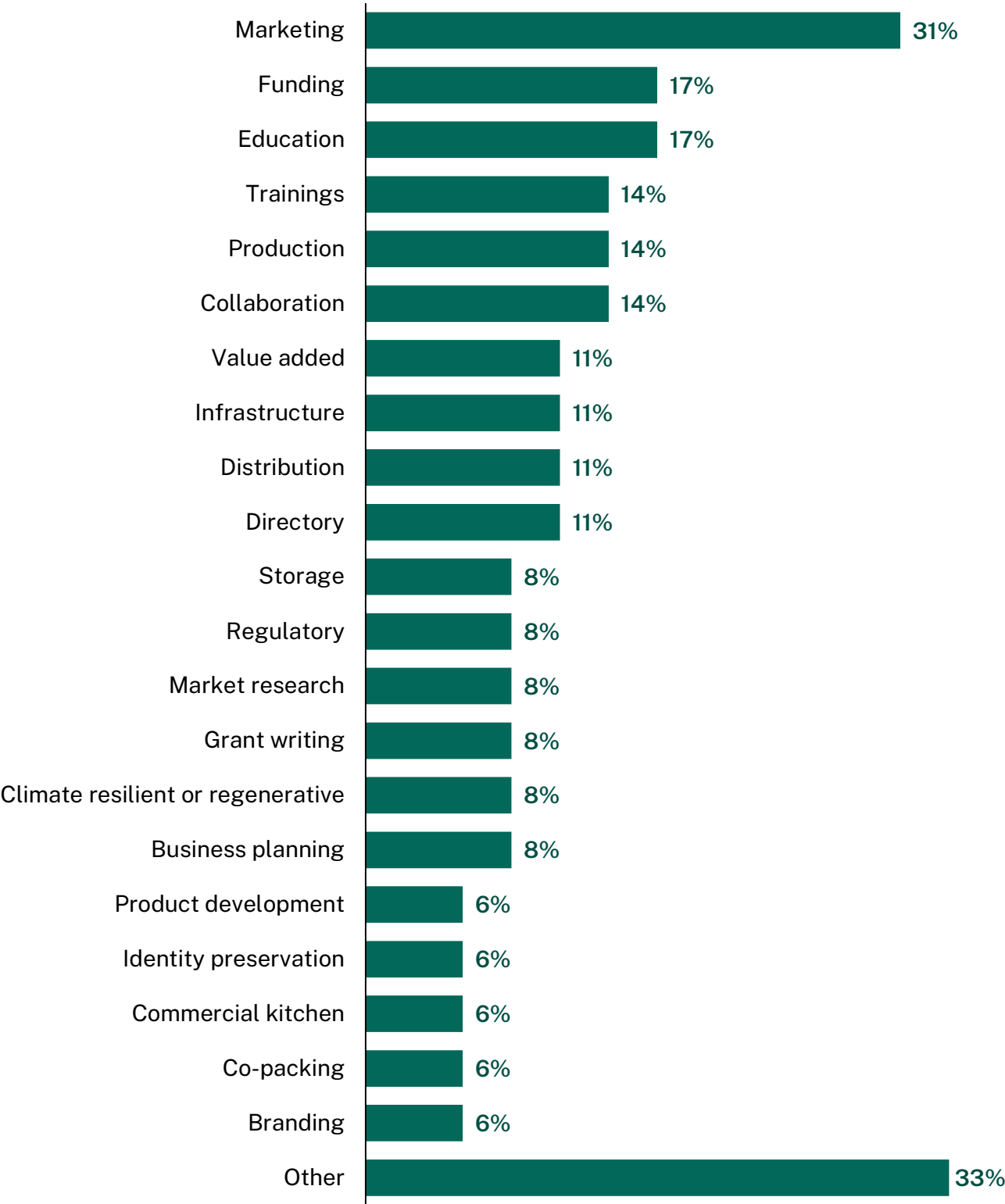


TABLE 39 | *Primary themes from TA provider survey respondents' perspectives on priorities the Center should invest in to strengthen business viability and market access for climate-resilient grains and pulses (n=36)*

Theme	Example quotes
Collaboration	"Connect organizations such as ours to systems that are working and those already there in order to increase understanding that can be passed down to those needing it."
	"Build strategy with SBDC state and local."
	"Networking and Collaboration."
Education	"Education and Marketing - how can we collaborate to get messaging out about benefits and value-ad of locally sourced grains?"
	"Increase in educational resource materials."
Funding	"Helping them find funding sources."
	"Increase support for those already providing technical support financially, whether in grant writing or providing those funds."
	"Expand business builder grant funding pool significantly (not quite the answer to your question but seems like the pool needs to be way bigger). Invest in further exploration of supply chain developments/processing for things such as Kernza, triticale, naked barley, and other climate-friendly grains."
Marketing	"Cooperative marketing (e.g., social media marketing)."
	"Develop marketplace and increase buying community (demand side forces)."
	"Marketing and promotion."
Production	"Production training and support."
	"Agronomy."
	"Help with discovery of climate resistant grains and benefit of producing them."
Trainings	"Training for institutions (culinary) on how to integrate these items."
	"Train the trainer and mentor the mentor scenarios."
	"Technology Training Initiatives for Producers (e.g. Eat Drink Washington County)."

Theme	Example quotes
Directory	"Support a directory of existing businesses to increase visibility to consumers and wholesale buyers." "Assessment and mapping of interested farmers or farmers already producing these crops."

TA provider respondents were also asked to describe the most important next steps to improve coordination among producers, processors, distributors, and buyers of climate-resilient grains and pulses in their service area (Table 40, Appendix B).

TABLE 40 | Primary themes from TA provider survey for increasing coordination within climate-resilient grain and pulse supply chains (n=48)

Theme	Summary	Example quotes
Build demand	<i>Develop markets for these crops by stimulating market demand</i>	"Aligning supply/production of products with the process of influencing large-scale (institutional) demand for these products; large buyers need to understand and drive demand for these products before we (as brokers) feel confident telling farmers they should scale production." "...marketing to build consumer demand"
Certifications	<i>E.g. Salmon-Safe, Regenerative, Organic, Climate Resilient</i>	"We need to get producer buy-in and agronomic support for regenerative agriculture practice implementation before we start trying to sell regenerative grain. From there we need off-takers to commit to buying regen products so we can start building the necessary mid-scale processing." "Consolidation of labeling to accurately document stewardship results on the land."
Distribution	<i>Strengthening distribution channels</i>	"... improve distribution of local food across the state and region." "Support processing infrastructure and distribution needs." "Processing facilities and distribution."
Networking	<i>Connecting producers, buyers, and organizations</i>	"Networking to connect producers through farm organizations." "Provide opportunities for producers etc., come together for learning and networking."

Theme	Summary	Example quotes
	<i>in the grain supply chain</i>	"Ways to connect outside of busy season like a conference of sorts."
Processing	<i>Support for processing infrastructure and value-added products</i>	"I think that equipment and processing for small farms is the biggest barrier to most diversified producers in Colorado." "Offer support in value-added marketing around grains (environmental, nutritional, etc.), support distribution and processing infrastructure, support in navigating regulations (e.g. how does a local bakery get their bread into a larger grocery store, how does a farm or a mill become certified organic and what financial and technical resources are there to support?"

Market channels

AG CENSUS DIRECT MARKETING DATA

Table 40 details the number of farms that sell locally or regionally branded products directly to consumers and intermediated markets. Direct-to-consumer markets include farmers markets, farm stands, roadside stands or stores, u-pick, CSA (Community Supported Agriculture), online marketplaces, while intermediated markets include supermarkets, restaurants, caterers, independently owned grocery stores, food cooperatives, K-12 schools, colleges or universities, hospitals, workplace cafeterias, prisons, food banks, and other institutions.

In 2022, farms in the service area generated \$2.2 billion in direct marketing sales, with 8% selling directly to consumers and 4% selling directly to intermediated markets.

Oregon leads the region in direct-to-consumer sales, with 4,550 farms (13%) accounting for 42% of total sales in this category. Washington has the highest number (1,812) and percentage (6%) of farms selling to intermediated markets, representing 61% of all direct-to-intermediated market sales in the six-state region.

Percent of farms that sell locally or regionally branded products directly by market type & state

Total service area

- Direct-to-consumer: 8%
- Intermediated: 4%

Colorado

- Direct-to-consumer: 7%
- Intermediated: 2%

Idaho

- Direct-to-consumer: 7%
- Intermediated: 3%

Montana

- Direct-to-consumer: 4%
- Intermediated: 2%

Oregon

- Direct-to-consumer: 13%
- Intermediated: 5%

Washington

- Direct-to-consumer: 11%
- Intermediated: 6%

Wyoming

- Direct-to-consumer: 5%
- Intermediated: 2%

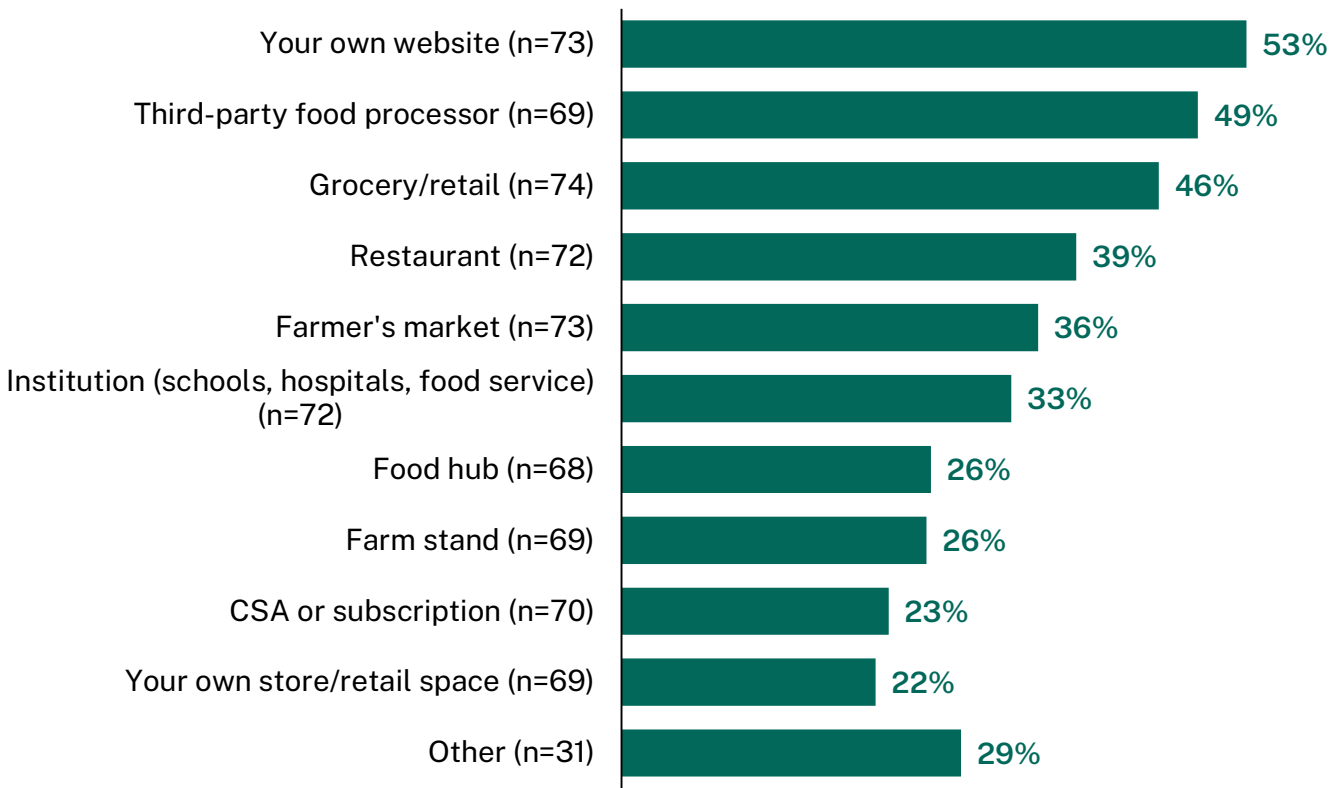
TABLE 40 | *Number, percent, and total sales of farms that sell locally or regionally branded products directly to consumers or intermediated markets by state and substate region, 2022*

		Directly to consumers			Directly to intermediated markets		
		Count	%	Sales	Count	%	Sales
Colorado	Service area	13,482	8%	\$279,020,000	5,879	4%	\$1,905,596,000
	Colorado total	2,447	7%	\$29,228,000	906	2%	\$168,594,000
	East Central	535	6%	\$5,268,000	124	1%	\$6,120,000
	Northeast	675	8%	\$8,406,000	189	2%	\$61,814,000
	NW and Mountain	329	9%	\$2,451,000	126	4%	\$1,612,000
	San Luis Valley	80	5%	\$528,000	78	5%	\$61,844,000
	Southeast	139	3%	\$1,573,000	80	2%	\$2,306,000
	Southwest	689	7%	\$11,002,000	309	3%	\$34,898,000
Idaho	Idaho total	1,499	7%	\$16,430,000	638	3%	\$54,955,000
	East	418	5%	\$3,181,000	188	2%	\$29,418,000
	North	367	7%	\$2,504,000	120	2%	\$1,949,000
	South Central	139	4%	\$1,550,000	118	3%	\$7,927,000
	Southwest	575	9%	\$9,195,000	212	3%	\$15,661,000
Montana	Montana total	931	4%	\$15,049,000	556	2%	\$41,696,000
	Central	129	3%	\$1,122,000	71	2%	\$4,051,000
	North Central	45	1%	\$1,053,000	63	2%	\$18,942,000
	Northeast	47	2%	\$255,000	30	1%	\$449,000
	Northwest	458	9%	\$10,097,000	206	4%	\$7,541,000
	South Central	133	4%	\$1,581,000	111	3%	\$4,164,000
	Southeast	27	1%	\$51,000	20	1%	\$1,444,000
	Southwest	92	4%	\$890,000	55	2%	\$5,105,000
Oregon	Oregon total	4,550	13%	\$116,493,000	1,792	5%	\$468,562,000
	North Central	172	11%	\$3,533,000	148	9%	\$108,818,000
	Northeast	305	9%	\$3,115,000	140	4%	\$32,022,000
	Northwest	3,014	16%	\$84,755,000	1,068	6%	\$258,562,000
	Southeast	397	7%	\$4,794,000	180	3%	\$34,698,000
	Southwest	662	12%	\$20,296,000	256	5%	\$34,462,000
Washington	Washington total	3,564	11%	\$98,026,000	1,812	6%	\$1,165,377,000
	Central	541	8%	\$21,777,000	552	8%	\$349,797,000
	East Central	170	4%	\$9,466,000	182	5%	\$432,743,000
	Northeast	388	11%	\$3,627,000	88	2%	\$1,605,000
	Southeast	147	6%	\$15,312,000	101	4%	\$162,039,000
	Western	2,318	15%	\$47,844,000	889	6%	\$219,193,000
Wyoming	Wyoming total	491	5%	\$3,794,000	175	2%	\$6,412,000
	Northeast	106	4%	\$769,000	41	2%	\$607,000
	Northwest	149	5%	\$1,154,000	53	2%	\$1,820,000
	South Central	73	6%	\$848,000	31	2%	\$1,548,000
	Southeast	91	3%	\$592,000	35	1%	\$2,359,000
	West	72	5%	\$431,000	15	1%	\$78,000

FARM AND FOOD BUSINESS SURVEY RESULTS

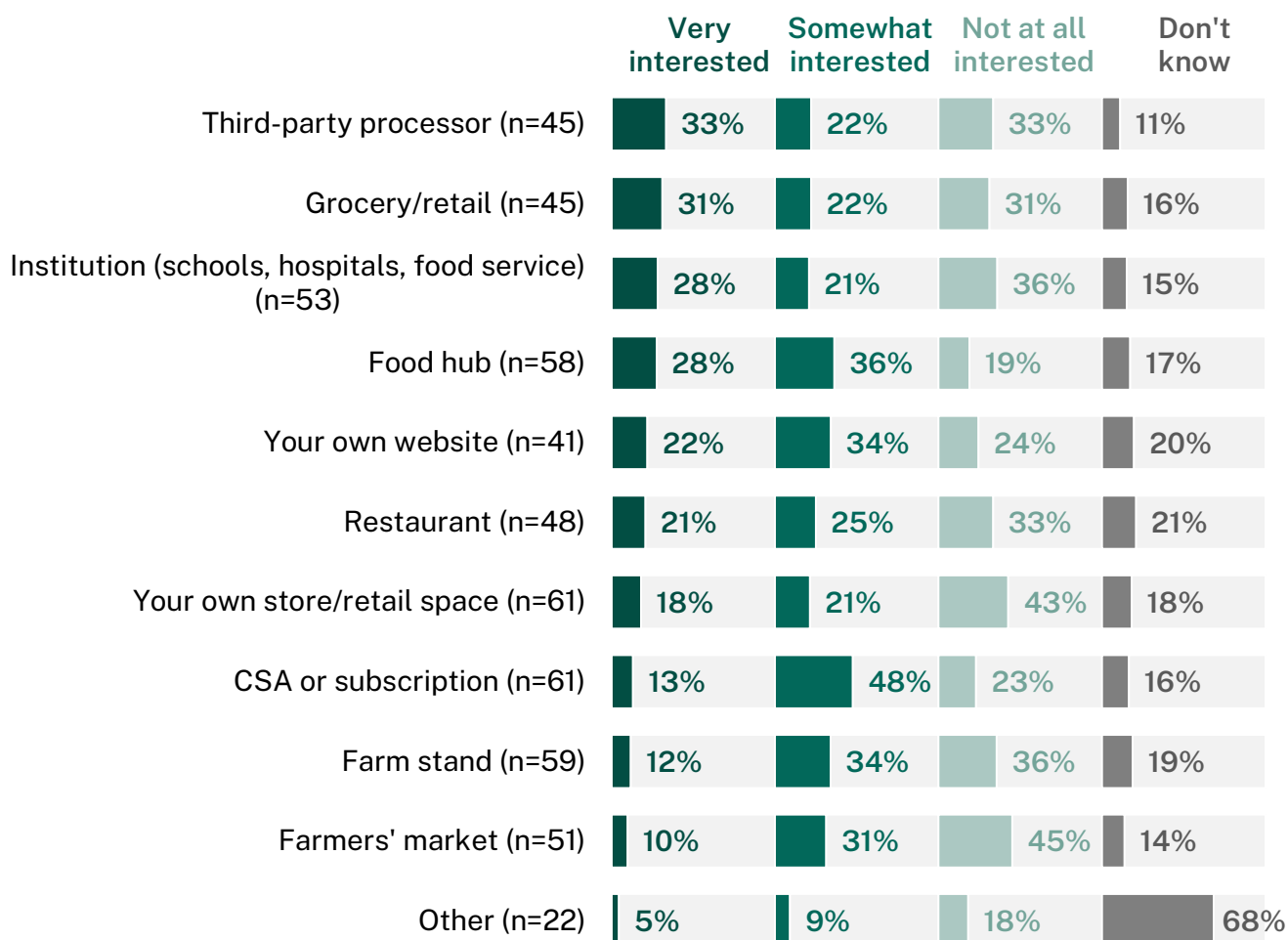
The survey asked farm and food business respondents about the market channels they use to distribute and sell their products. More than half (53%) reported selling through their own website among other channels (Figure 73). Those who do not use certain market channels were asked about their level of interest in adopting them. Notably, of those who do not already, 33% of respondents expressed strong interest in using a third-party processor, while 45% indicated they were not at all interested in selling at farmers' markets (Figure 74). The greatest proportions of respondents were most interested in starting to sell through various intermediated markets (processors, retailers, institutions, and food hubs).

FIGURE 73 | *Percent of farm and food business survey respondents that sell products through various market channels*



Other responses: Broker, direct to distiller, local grain elevators, national distributor, on contract to other seed companies, on farm, planning on several of the above, potato producers for processing or fresh pack, retail pop up, wholesale distributors, wholesale to distributors, word of mouth.

FIGURE 74 | Farm and food business survey respondents' level of interest in selling through various market channels (if they are not already)



Other responses: Farm to food bank, fresh meat markets, butcher shops, interested in learning more about selling to a distributor, mission-aligned ingredients distributor, working with other CSA farms to include grains.

Respondents also provided insight into the geographic scope of their distribution (Figure 75). Greater proportions sell locally (85%) and regionally (76%) than nationally (52%) or internationally (30%). When asked about expanding into markets they do not currently serve, 55% who do not yet distribute at a regional level said they are very interested in doing so (Figure 76). The majority (60%) of those who do not currently sell internationally said they are not interested in starting. Overall, there is more enthusiasm among farm and food business survey respondents in local and regional markets than in national or international markets; however, at the same time 58% who are not selling to national markets said they are somewhat or very interested in doing so.

FIGURE 75 | Farm and food business survey respondents' geographic scope of distribution

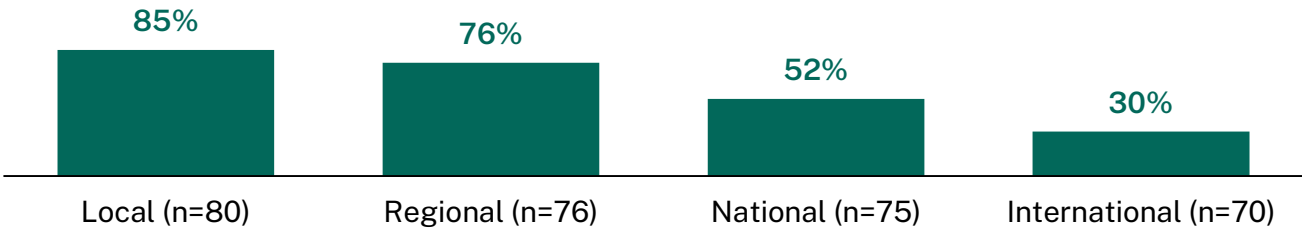
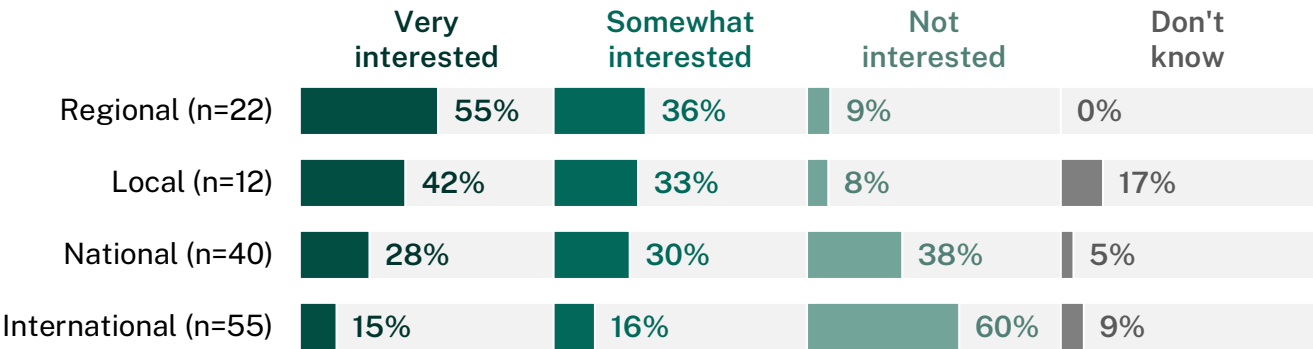
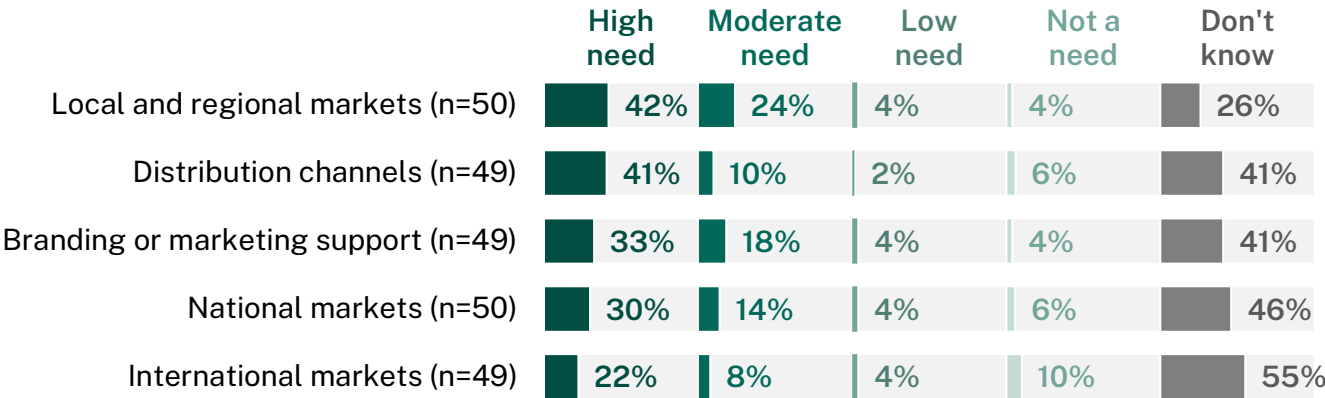


FIGURE 76 | Farm and food business survey respondents' level of interest in selling to different markets



Farm and food business survey respondents were asked how much of a need is there to develop select markets and support for “climate-resilient” grain and pulse growers/processors in their area (Figure 77). Twenty-six percent to 55% of respondents indicated they do not have an informed judgement of these topics, answering “don’t know.” The largest proportions had the highest need for local and regional market development and development of distribution channels.

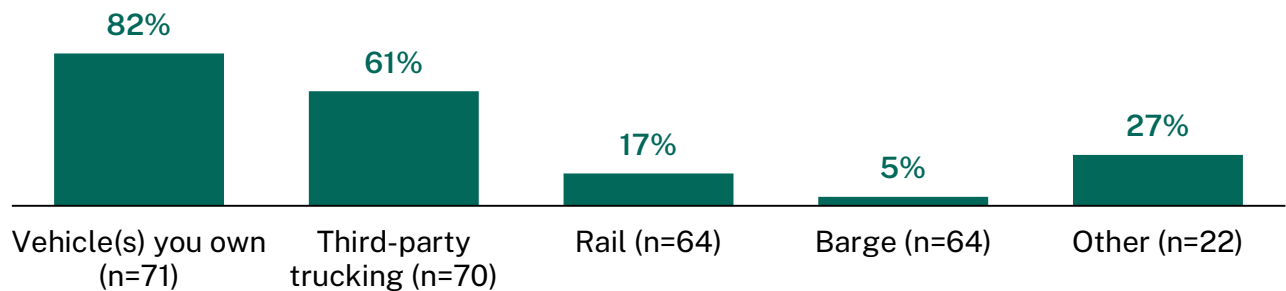
FIGURE 77 | Farm and food business survey respondents' estimation of the level of need for markets and support for climate-resilient crop growers/processors



Distribution

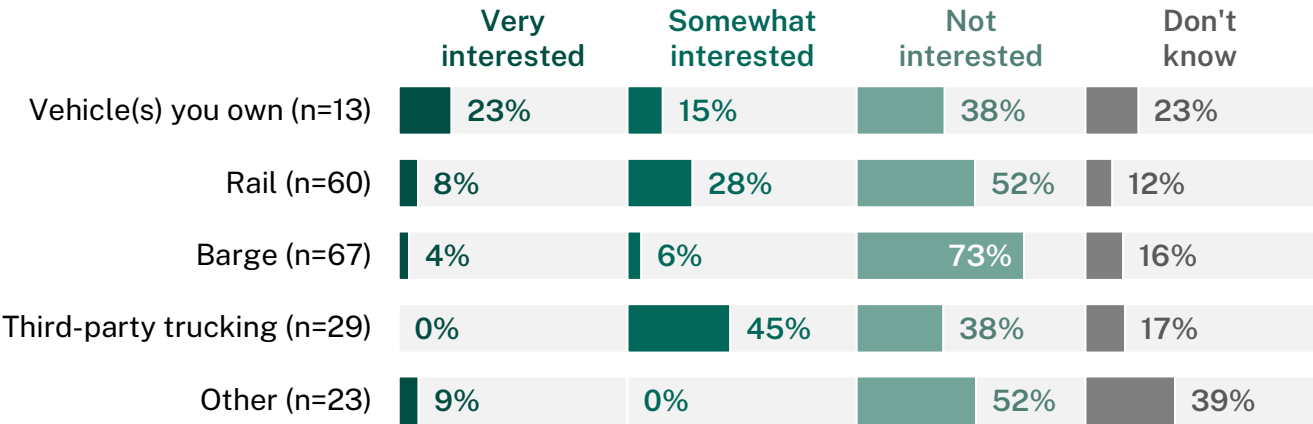
The survey asked farm and food business respondents to report the types of transportation they use to distribute their goods and how interested they are, if at all, in using the types of transportation they do not already use. The vast majority (82%) of respondents use their own vehicles for distribution, followed by 61% who use third-party trucking. Rail and barge transportation are used far less frequently, at 17% and 5%, respectively (Figure 78). Apart from the 23% who said they are very interested in starting to use vehicles they own, few respondents indicated strong interest in expanding into transportation options they do not already use (Figure 79). While no one said they are very interested in starting to use third-party trucking, 45% said they are somewhat interested. Similarly, while only 8% are very interested in starting to use rail, 28% are somewhat interested.

FIGURE 78 | *Types of transportation used by farm and food business survey respondents to distribute their products*



Other responses: Commercial package (UPS, USPS, FedEx), Coop truck, Food Distributor, Food Hub, Grain trucks, Mail

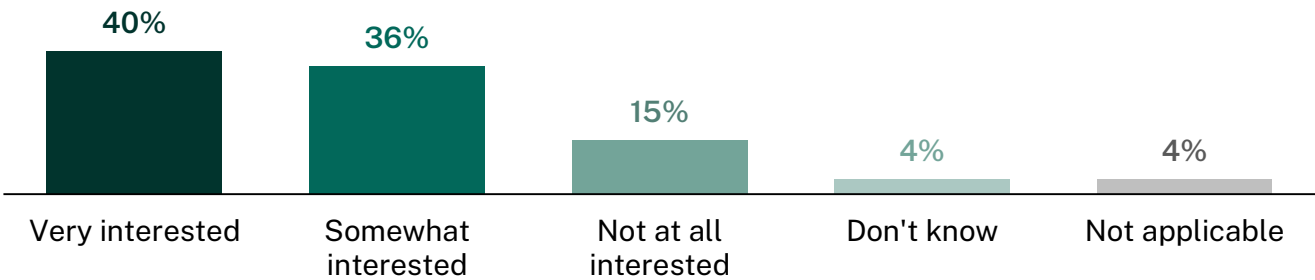
FIGURE 79 | *Farm and food business survey respondents' level of interest in using different types of transportation for distribution that they do not already use*



Other responses: reliable rail service, semis

We also asked farm and food business survey respondents about their interest in backhauling, the practice of a truck carrying goods on their return trip, which reduces empty truck mileage. This emerged as a promising opportunity, with 40% of respondents reporting they are very interested and another 36% somewhat interested in being connected to backhauling opportunities (Figure 80).

FIGURE 80 | Farm and food business survey respondents' level of interest in backhauling opportunities (n=72)

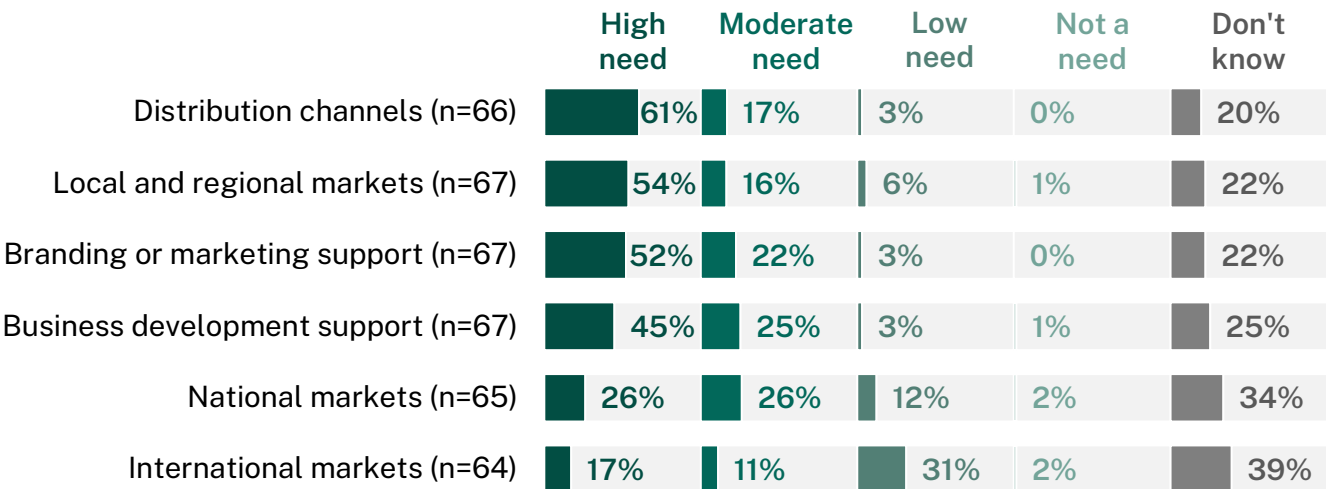


TA PROVIDER SURVEY RESULTS

Forty-seven percent of TA provider survey respondents said their organization provides distribution services (n=73) (Figure 71).

We also asked TA provider survey respondents how much of a need there is in their service area to develop select attributes to strengthen businesses and supply chains for climate-resilient grains, pulses, and related value-added products (Figure 81). Large majorities said there is a high or moderate need to develop most of the supports asked about. The largest proportion identified developing distribution channels, local and regional markets, branding or marketing support, and business development support as the highest needs.

FIGURE 81 | Technical assistance provider survey respondents' perspectives on business and supply chain needs for developing local and regional supply chains for climate-resilient grains and pulses



In contrast, developing international markets ranked the lowest, with 31% of TA respondents rating the need to develop international markets as a “low need.” Based on recent supply chain and market development meetings our team has participated in as part of other projects, there could be promising international niche markets for field crop products grown with “climate-resilient” practices in which Northwest and Rocky Mountain producers could gain price premiums and sell larger volumes than they could in local and regional markets alone. For example, Japanese companies may be seeking climate-resilient grains for whisky and noodles that producers in the Center’s service area could provide. We recommend keeping an open mind regarding the potential for value-aligned national and international markets while also developing and serving local and regional ones. Relatedly, a TA provider survey respondent made this suggestion:

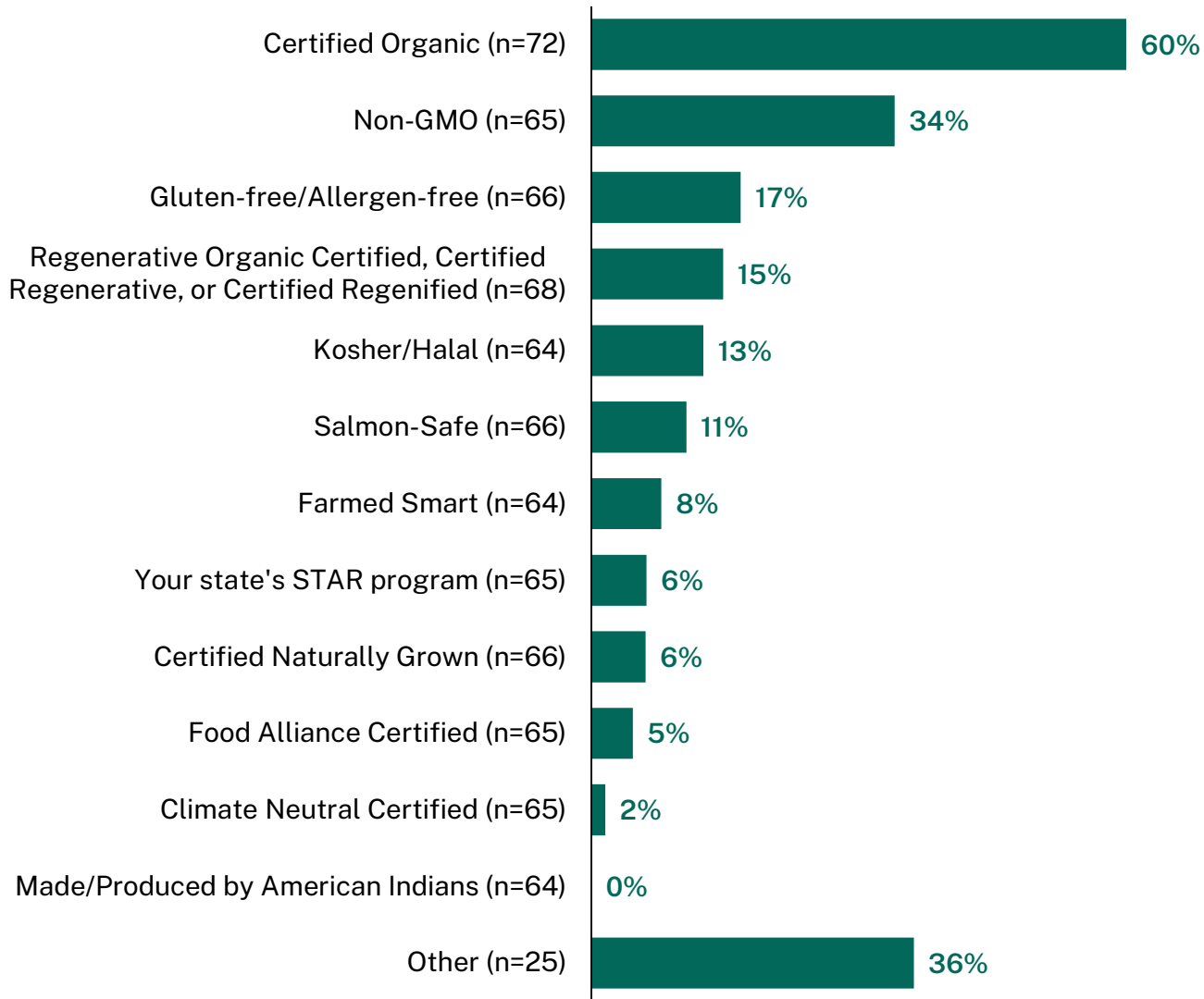
I also do feel like there's a gap between the markets that much of the wheat grown in the Palouse goes into in Asia, such as Japan and China. If there was a way to further facilitate a dialogue with those buyers and get them interested in sourcing a value-added commodity (such as Salmon-Safe or Farmed Smart wheat), that would strike me as a way to get more climate resilient practices on the landscape. It would also open up other opportunities to sell products domestically to other high value markets, but would at least elevate growing practices ideally to a higher and more comprehensive level of stewardship. I think further facilitating conversations with farmers and retailer buyers is key. Any forum in which these people can get in a room with one another would be fantastic to foster a dialogue to ultimately get their crops on purchased. -TA survey respondent

Certifications and marketing claims

FARM AND FOOD BUSINESS SURVEY RESULTS

Farm and food businesses shared the third-party certifications and characteristics they use to market their products (Figure 82). Respondents most commonly (60%) have organic certification. However, because the survey outreach included the National Organic Programs’ Organic Integrity Database, organic operations were likely over-sampled and over-represented in the results as only 1% of farms in the region are certified organic and 0.2% have acres transitioning into organic production (Table 21). Roughly one-third of respondents market products as non-GMO.

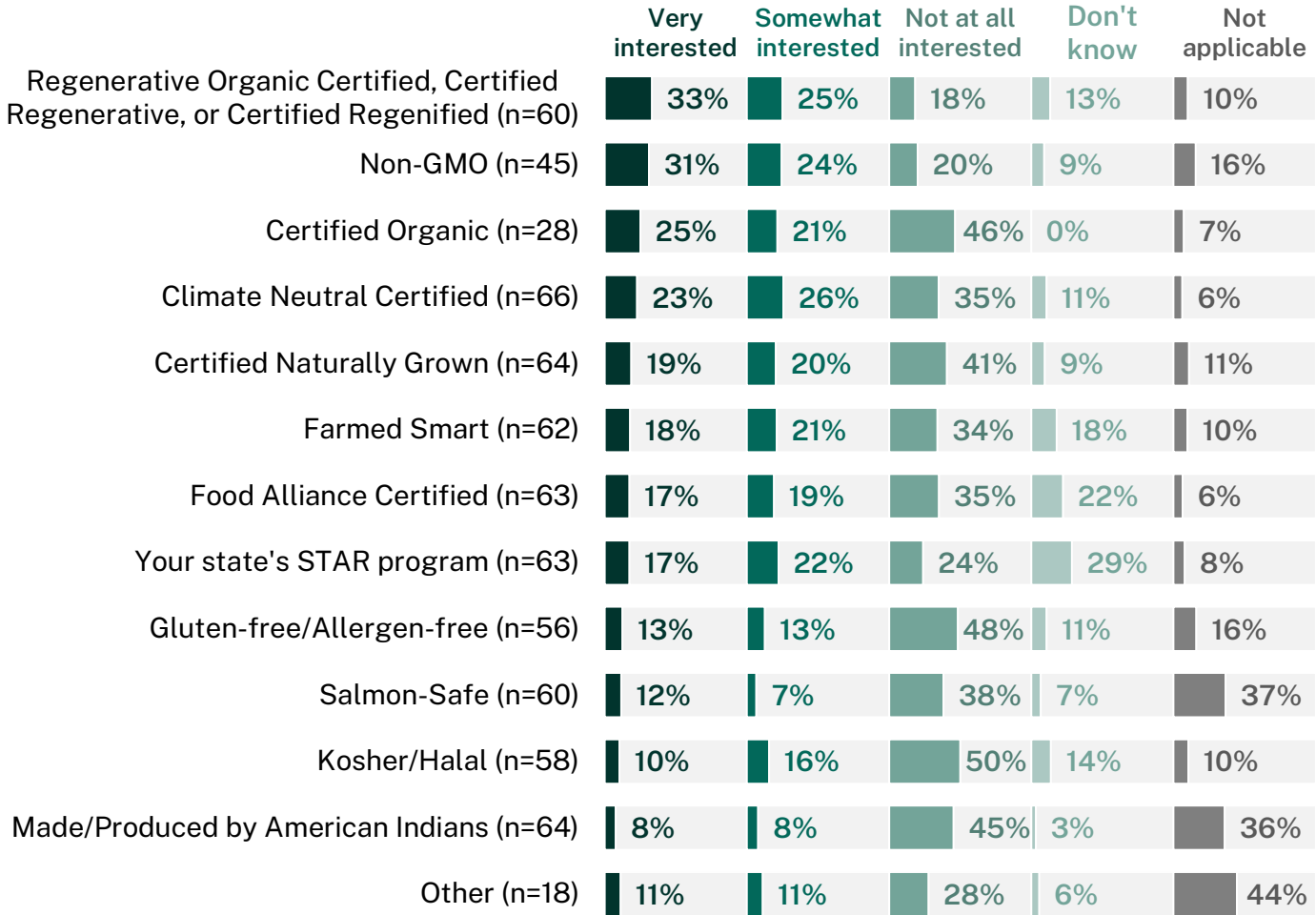
FIGURE 82 | *Third-party certifications and labels used by farm and food business survey respondents*



Other responses: A2A2 Milk, Bee Better (2), GAP certified, Glyphosate Free, REAL Organic Project (4)

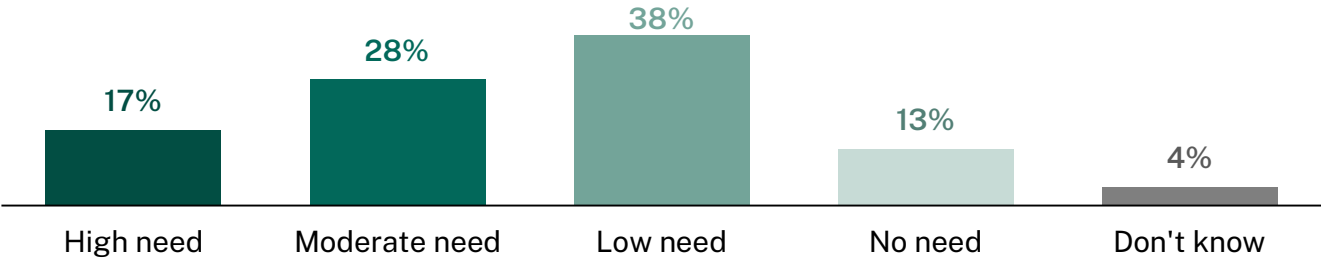
Survey respondents also shared their level of interest in certifications and labels they do not currently use (Figure 83). Thirty-three percent expressed a strong interest in regenerative labels and certifications. Thirty-six percent noted that the “Made/Produced by American Indians” label did not apply to their business, and 45% reported no interest in pursuing it. Among those who are interested in adopting a certification or label they do not already use, the highest level of interest for the greatest proportion of respondents was in regenerative, non-GMO, organic, and climate neutral certifications/labels, although considerable proportions expressed interest in others as well.

FIGURE 83 | Food and farm business survey respondents' interest in third-party certifications they do not already use



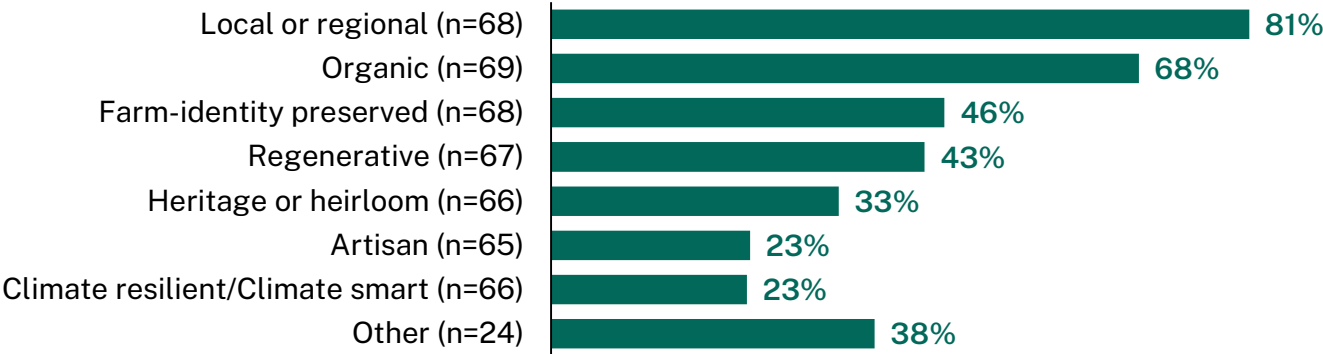
Survey respondents were asked to what extent, if at all, they need help understanding or evaluating third-party certifications for their products, given the wide range of certifications and labels to choose from, many requiring involved applications and recordkeeping. Nearly half of respondents (45%) said they have a high (28%) or moderate (28%) need for support (Figure 84).

FIGURE 84 | Food and farm business survey respondents' level of need for help understanding and evaluating third-party certifications for their products (n=71)



In addition to certifications, many farm and food businesses market their products using other claims. The most common approach is emphasizing locality or regionality: 81% of respondents reported using terms such as “local” or “regional” in their marketing (Figure 85). While 68% of respondents reported marketing their products using the term “organic,” note that farms that sell \$5,000 or less in organic products annually are exempt and may use the term “organic” without needing to be certified. Another popular strategy is highlighting farm identity, with 46% of respondents incorporating farm-identity preserved information in their labeling and marketing.

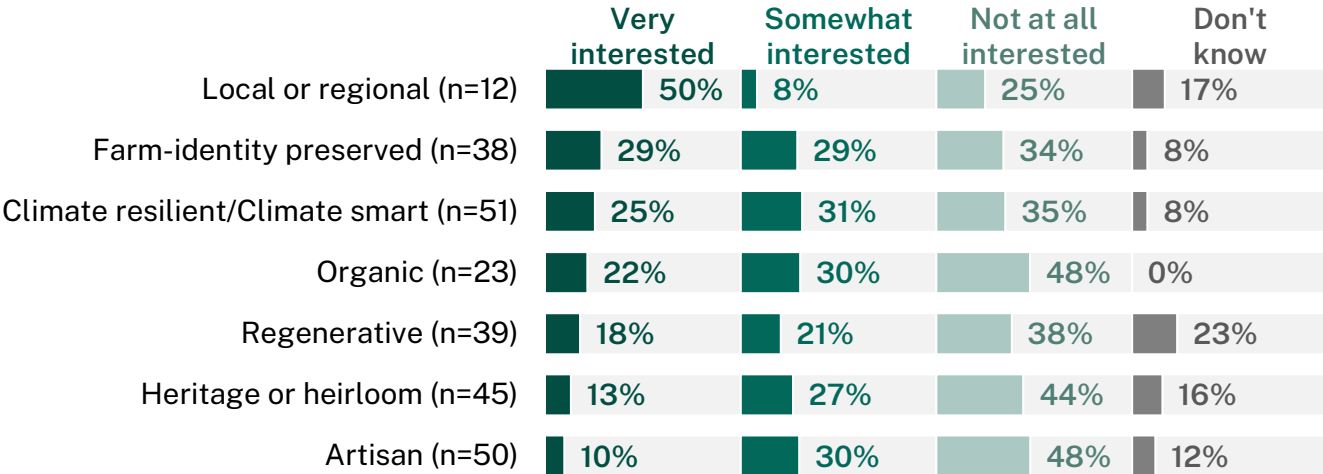
FIGURE 85 | Characteristics used by farm and food business survey respondents to market products



Other responses: Bee Better; REAL Organic, BIPOC - owned, Grass fed, Montana, Nutrient dense, Open-pollinated, Pollinator safe, no pesticides or herbicides, State organic certifier, Washington State

Respondents also shared their level of interest in using marketing claims they do not currently employ (Figure 86). Of the 12 respondents who do not already use “local” or “regional” in their marketing, 50% reported being very interested in doing so. Similarly, 29% of respondents who do not already said they are very interested in using farm-identity-preserved marketing and 25% are very interested in starting to use climate-resilient/climate smart marketing claims.

FIGURE 86 | Food and farm business survey respondents’ interest in using characteristics that they do not already use to market products



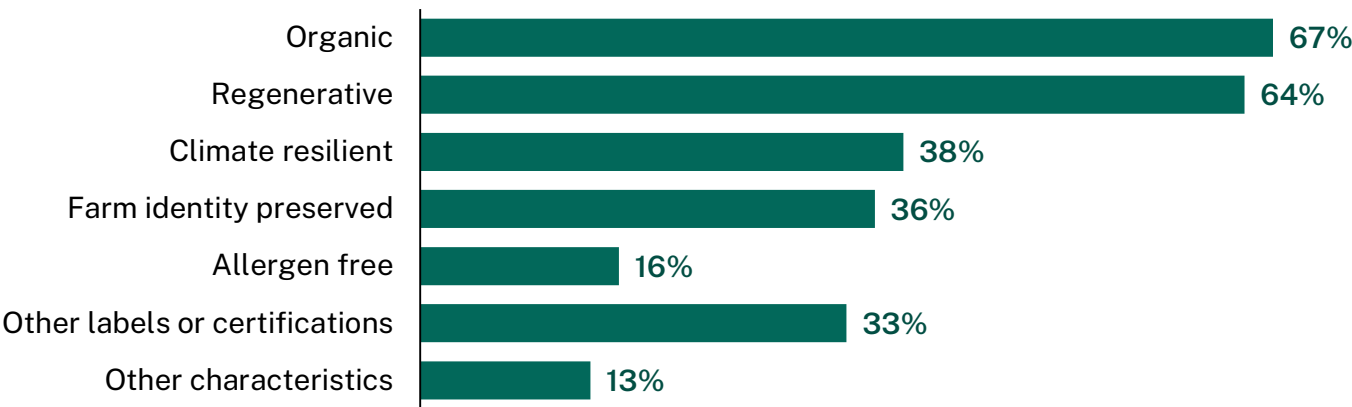
TA PROVIDER SURVEY AND INTERVIEW RESULTS

One key informant interviewee who works with grain growers emphasized the need to market and educate consumers about the benefits of diversified grains, saying

I think **marketing** around why local grains matter and why diversified grains matter. Millet grows so well here in Colorado; it's drought tolerant. It's a really nutritious crop. But...it's not one that the average American is going to be like, 'oh, let me heat up my bowl of millet.' Whereas in other parts of the world, it is a staple food. But that's a great climate-appropriate crop that is nutritious and healthy...[we need] marketing around these kinds of grains that are great for the environment are better suited to the environment, are localized, and have a health benefit too. -Interviewee

Figure 87 illustrates the types of marketing-related technical assistance respondents provide. The majority offer support for organic (67%) and regenerative (64%) marketing characteristics, reflecting strong alignment with existing certification trends. In contrast, fewer respondents provide assistance with “climate resilient” (38%) and “farm-identity preserved” (36%) marketing strategies, indicating potential gaps in available support for these emerging claims.

FIGURE 87 | Percentage of technical assistance provider survey respondents that offer TA and resources related to certifications and marketing characteristics (n=45)



Other labels or certifications mentioned: Bee Better, Certified Naturally Grown, Farmed Smart, Food Service Management Company “Farm to Fork Approved” (BAMCO), GAP, Grassfed (2), GSFI Audits, Halal, Kosher, Real Organic, ROC (Regenerative Organic Certified), Salmon-Safe (2), Serv Safe, Sodexo Regenerative.

Other characteristics mentioned: Biodynamic, BIPOC Producer, Colorado Grown Grains co-branding, Locally grown, Native grown, Veteran-owned business, Women-owned business.

Supporting right-size investing and infrastructure for climate-resilient grains

The NWRM RFBC has a priority to provide coordination, technical assistance, and capacity building to reduce gaps in understanding between funders of all types and businesses across the regional food value chain, from farm gate to plate. To better understand how to serve producers and processors in the region, we asked food and farm businesses and technical assistance providers about their experiences and assessment of supports that are still needed and should be prioritized.

Funding support farm and food business survey respondents have received and need

Sixty-eight percent of farm and food business survey respondents said they have received a grant, and 53% have received a loan for their business (n=42) (Figure 88).

Survey respondents were asked how difficult or easy it has been to get grants and loans for their business. Although some have experienced ease, respondents have more commonly experienced difficulty accessing funding: 61% said obtaining grant funding (Figure 89) and 75% said getting a business loan has been very or somewhat difficult (Figure 90).

FIGURE 88 | Percent of farm and food business survey respondents that have ever received a grant or loan for their business (n=42)

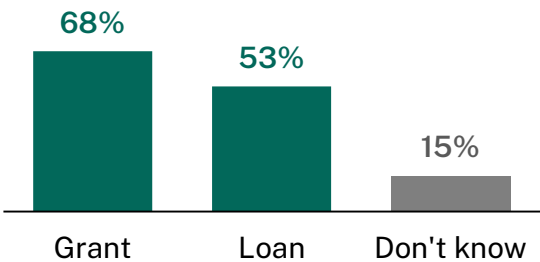


FIGURE 89 | Farm and food business survey respondents rating how easy or difficult it has been for them to get grant funding (n=61)

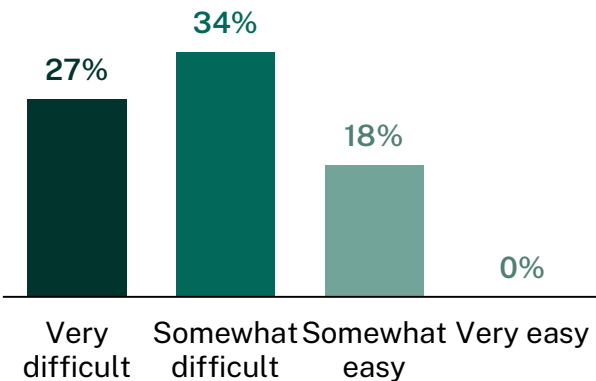
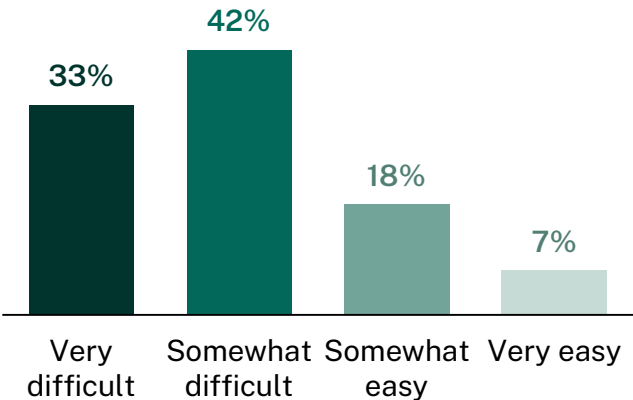


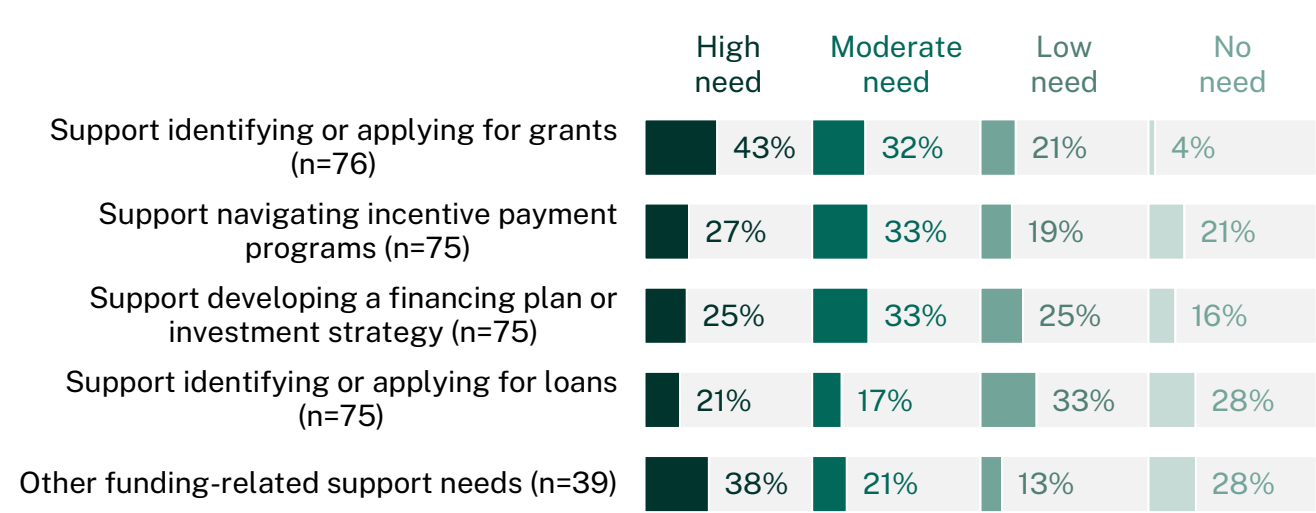
FIGURE 90 | Farm and food business survey respondents rating how easy or difficult it has been for them to get business loans (n=57)



Farm and food business survey respondents were asked to report their level of need for specific types of funding-related technical assistance (Figure 91). The majority of respondents said they have high or moderate need for nearly all the types of support we asked about; however, the highest need for the largest proportion is support identifying and applying for grants.

We asked food and farm business survey respondents, "Do you have any feedback for grant makers or lenders related to how they could make their programs more accessible or equitable for businesses like yours?" Table 41 summarizes their responses by theme. Appendix B includes all responses to this question. Respondents commonly suggested it would be useful to have access to an easily searchable database or repository of available grants and loans. Other common feedback included that applications are too long or complicated.

FIGURE 91 | Farm and food business survey respondents' level of need for technical assistance related to funding



Other responses: Access to processing facilities, cooperation among multiple parties along the food distribution chain for an application, grant administration, infrastructure, market access, navigating TA and \$\$ connections, non-extractive capital, securing mission-aligned equity investment for key infrastructure, sponsors and donors, USDA grants

TABLE 41 | Farm and food business survey respondents' feedback for grant makers and lenders related to how they can make their programs more accessible and equitable (n=26)

Theme	Example Quote(s)
Capacity building assistance	"Contacts for helping walk through application processes or a mentorship option for successful grant/loan applicants to those new to the grant/loan process. Thank you!" "I am embarrassed to say this, but I realize that grants and loans are so outside my comfort level that I become kind of paralyzed when attempting them. A physical human support or mentorship option if not an employed person would be incredibly helpful. I think if I had that support once or twice, I could get the

Theme	Example Quote(s)
	swing of it and be not just good on my own, but could also help others in return. Thank you for your work!" "It is incredibly challenging to build a cohesive mix of equity, grants, and loans that is altogether needed to build food systems infrastructure. In general, I think it would go a long way for promising food systems entrepreneurs/founders to have access to COO/CFO-level business incubation assistance that is focused squarely on getting food systems projects funded."
Database	"Centralized, searchable dashboard of available grants/ low interest loans." "It would be nice to have all grants in some sort of database. That way deadlines and opportunities could all be found in one place." "Provide a centralized place to look for funding. It seems every new person we talk to gives a new website and says, 'oh yeah, here's where grants like that get posted.'"
Fit	"As a university farm with NO financial support from the university it is VERY hard to apply for funding. The student-driven farm is exempt from most USDA funding in EQUIP and also is not a non-profit, so exempt from that funding. Located at a...research university is it difficult to carve out our niche, however student and community interest in urban farming is reaching all-time highs." "I have not found it very easy to find grants that apply to individual producers." "Most grants are for producers. We are a food hub that needs help to grow and be more efficient."
Grant writers	"Grant writing is incredibly time-consuming and frustrating for farmers who are busy not being at their computers. We need more funding for rural grant writing support people." "Provide funding for entrepreneur-directed TA, funds for the advocate, navigator and grant writer, wrap-around services, team building, advising, and strategic fund development."
Complexity and timing of applications	"SIMPLIFY! Grant application, reporting and documentation requirements are very onerous and time-consuming. It seems based on the assumption of fraud and requires us to prove otherwise." "Simplifying paperwork, writing paperwork in simple language, sensible grant deadlines that take into account seasonality (for example, have application deadlines during the off season of the targeted producer, or award a grant for spreading compost before fall rains set in and field work becomes impossible)." "Make grant applications available during a slow part of the season. So many have a deadline during the busiest farming months and are near impossible to find time to apply to."
Start-up funding	"I'm trying to get land and get started. I'm on step zero not even step one. I need help to get off the ground."

Theme	Example Quote(s)
	"It took quite a while and was a long process but we were able to get a SBA loan. However, it was more short term, making the payments rather high for a brand new business. What is hard is getting rotating loans or lines of credit to help with cash flow while you are still getting your feet on the ground and building up your market."
Underserved audiences	"Please prioritize access for marginalized folks and also under-resourced regions (rural!!)."
	"We are a woman owned business....Also how about help for farms/businesses that want to become certified organic. For first time, outside help is almost essential."
	"Get more operational in actually reaching and "serve: historically underserved. you need to embrace equity more tangibly instead of being the (almost) all-white gatekeepers."

Funding support TA partners provide and believe is needed

We asked TA survey respondents if their organization provides select services to people who have or want to start a farm or food business (Figure 92). Notably, the most common type of funding assistance provided is support identifying or applying for grants, which is also what the largest proportion of farm and food business survey respondents identified as their highest funding development support need (Figure 91).

The survey asked respondents, "How much of a priority do you think it should be for the Northwest and Rocky Mountain Regional Food Business Center to help increase the following types of funding support for farms and food businesses in your service area?" The majority of TA provider survey respondents said helping to increase all the types of funding support we asked about should be high priorities for the Center (Figure 93). TA provider results on this topic also align with what farm and food businesses said regarding the high need to increase support identifying and applying for grants.

FIGURE 92 | *Funding technical assistance provided by survey respondents' organizations*

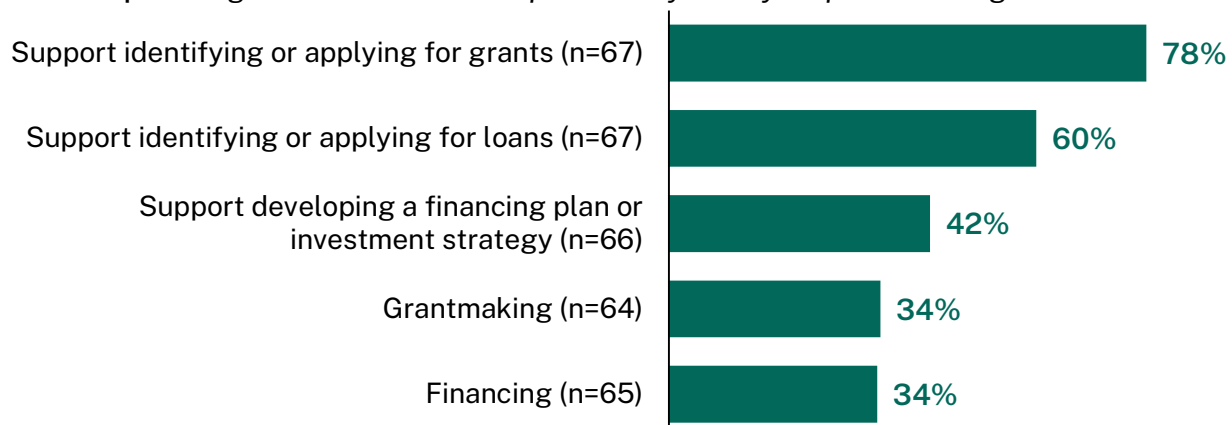
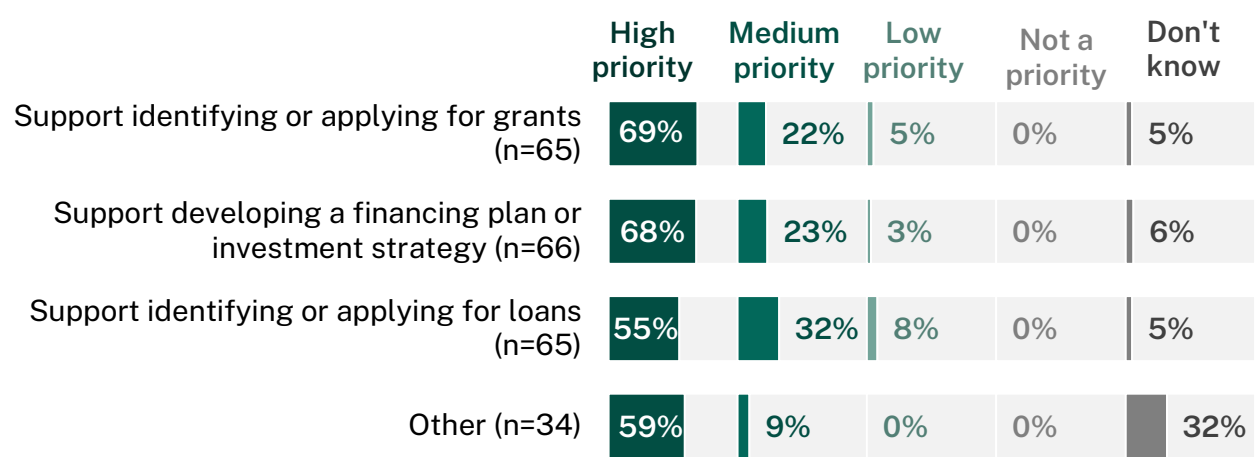


FIGURE 93 | Technical assistance provider survey respondents' perspective on the level of priority for increasing funding support for farm and food businesses



Technical assistance provider survey respondents were then asked, "How can funders and lenders make their programs more accessible for small and mid-scale farm and food businesses?" Table 42 summarizes their responses by theme, with all responses available in Appendix B. Many of the themes from TA providers' suggestions are the same as those from the farm and food business survey respondents.

TABLE 42 | Primary themes from TA provider survey respondents' suggestions for how funders and lenders can make their programs more accessible to small and mid-scale farm and food businesses (n=41)

Theme	Summary	Example quote(s)
Application support	Provide help navigating grant and other funding applications	"Offer support programs to both educate and work through the requirements."
		"Provide TA support in the application process, with language accessibility options."
		"Shorter applications; technical assistance with applying for the funding."
Educate lenders	Inform lenders of the unique challenges faced by small farm and food businesses	"Understanding that the risk is different but it doesn't mean it's bad."
		"Collateral is a primary barrier (people who have access to wealth are those who can most take advantage of supports and incentives even though they need them the least). Address the way rules are sometimes interpreted by individual loan officers/service providers based on their biases. Provide one-on-one counseling by people who are not condescending and have culturally specific experience

Theme	Summary	Example quote(s)
		(including low/mid income and rural frontier). Prioritize under-resourced business owners and those with demonstrable 'giving back' to their communities."
Simplify applications	<i>Streamline applications for grants and funding opportunities</i>	"Simplify Applications: Streamline paperwork and reduce complexity." "More simple applications, availability in multiple languages, TA for applications, availability to people with low credit and assets. For grants: non-reimbursement based, budget flexibility, multi-year funding, no matching requirement, simple application, inclusion of administrative costs, scoring clarity, responsive feedback with declines, flexible activities, flexible reporting, reduced reporting, competitive for smaller orgs, guidelines clarity." "Less paperwork and application requirements. Lower the barrier to entry for folks who aren't literate in the paperwork side of things." "Being more accessible, transparent and reducing paperwork and reporting burdens."
Partner with other organizations	<i>Support organizations already embedded in communities</i>	"Partner locally: Work with community groups to better understand and address business needs." "Getting the information out to the right individuals, partnering with local centers to get connected, trainings."

TA provider survey respondents were asked, "What training or other technical assistance do the farm and food businesses in your service area most need to improve their ability to secure grants or loans? Please list 1-3 priorities." Figure 94 shows the percentage of TA survey respondents who included salient topics in their response, and Table 43 summarizes responses by theme with illustrative quotations. Appendix B includes the full list of unedited responses.

FIGURE 94 | Primary themes from TA provider survey respondents when asked to list three priorities for improving farm and food businesses' ability to secure grants or loans (n=47)

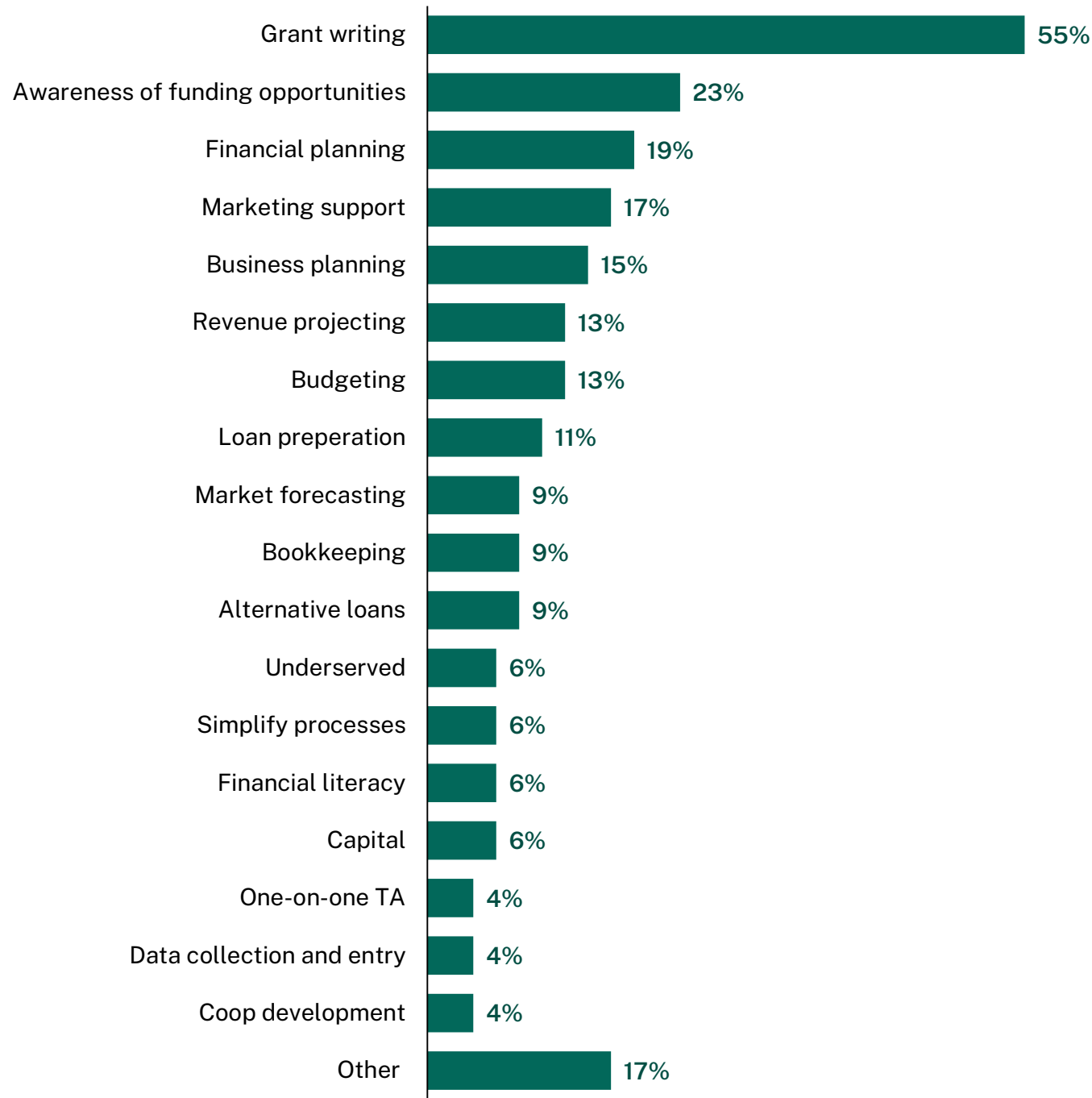


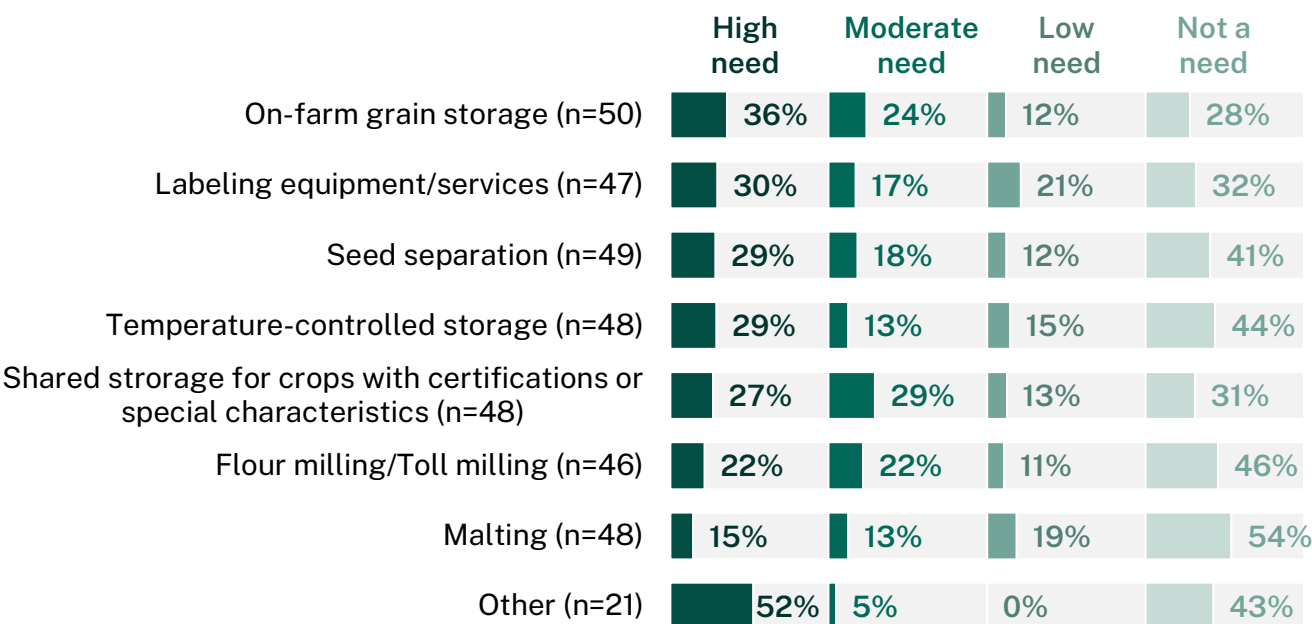
TABLE 43 | *Primary themes from TA provider survey respondents when asked to list three priorities for improving farm and food businesses' ability to secure grants or loans (n=47)*

Theme	Example quote(s)
Awareness of funding opportunities	"Identifying and centralizing information about available funding." "More clarity about the types of programs available." "Understanding what is available and what would work - comparison chart of some sort of different resources."
Budgeting	"How to draft a budget." "Ability to develop a realistic budget and funding outlook."
Business planning	"Having a strong business plan and financial projections to show lenders they have a plan to pay back the loan if there is a bad year." "Multiyear business planning to get ahead of grant/loan cycles."
Financial planning	"Realistic discussions on building a company on grants vs. viable financial resources and accountability. Too many times we here "we will just a get a grant" - grants are not the answer they are the extra." "Right sizing projects for funders."
Grant writing	"A center that will actually review the applications and help producers complete applications." "Help writing grants and applications for other funding resources (farmers are busy and that may not be their highest skillset)." "Free or low-cost assistance with preparing competitive federal grant applications, developing alternative forms of capital for under-resourced businesses." "Technical support in actually writing applications."
Marketing support	"Profitability seems to be a huge hurdle. Helping producers and processors understand how to price products, cuts, value added, etc." "Pricing and marketing assistance."
Revenue projecting	"Revenue and cash flow projections versus overhead." "Building solid pro-formas (sales projections)." "Projected cash flows."

Farm and food business perspectives on infrastructure

We asked farm and food business survey respondents to report how much, if at all, their business needs select grain-specific infrastructure and services. Many businesses said they had high or moderate need for most of the infrastructure and services asked about; however, the largest proportion had the highest need for on-farm grain storage: 60% said on-farm grain storage is either a high or moderate need for their business (Figure 95).

FIGURE 95 | From the farm and food business survey results: how much field crop growers and processors said their businesses need select infrastructure/services



Other responses: Bagging and transport, buildings, cleaning plant, composting equipment and extractor, grain dehullers, cooler and larger wash/pack, dryers, reliable rail, grain harvesting support, grain moving equipment, packaging and co-packers, power grid is strained at our on-farm location, processing of raw field grain, we plan to be integrated and networked and be a copacker.

Growers may use third-party processors to turn their grains and pulses into value-added products. For example, a food business might mill or malt their own grains and use a third-party for repackaging. We asked survey respondents if their business uses any third-party processing, and if not, if they would be interested in using them. Figure 96 shows that 47% of respondents use a third-party processor. Figure 97 shows that 29% of respondents are very interested, 25% are somewhat interested, and 42% are not at all interested in contracting with third-party processors. Table 44 lists the processors that survey respondents work with.

FIGURE 96 | Whether survey respondents use third-party processors for milling, malting, repackaging, or other processing activities (n=53)

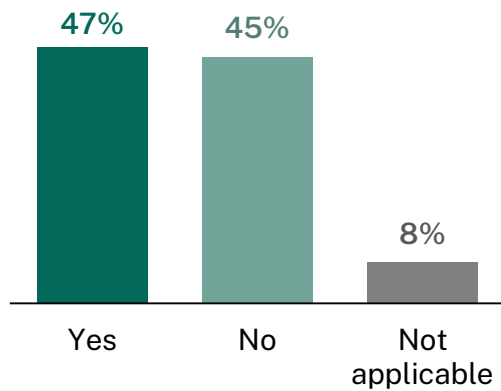


FIGURE 97 | Survey respondents' level of interest in contracting with third-party processors for milling, malting, repackaging, or other processing activities (n=24)

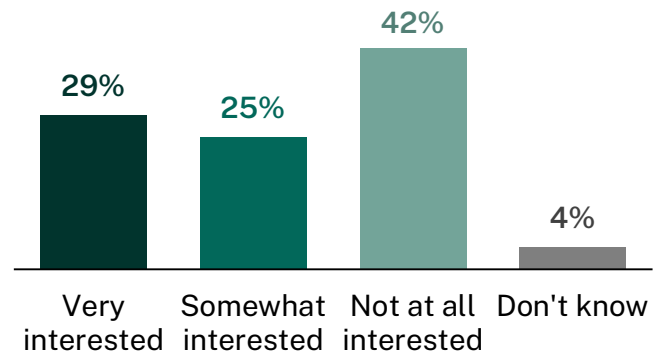
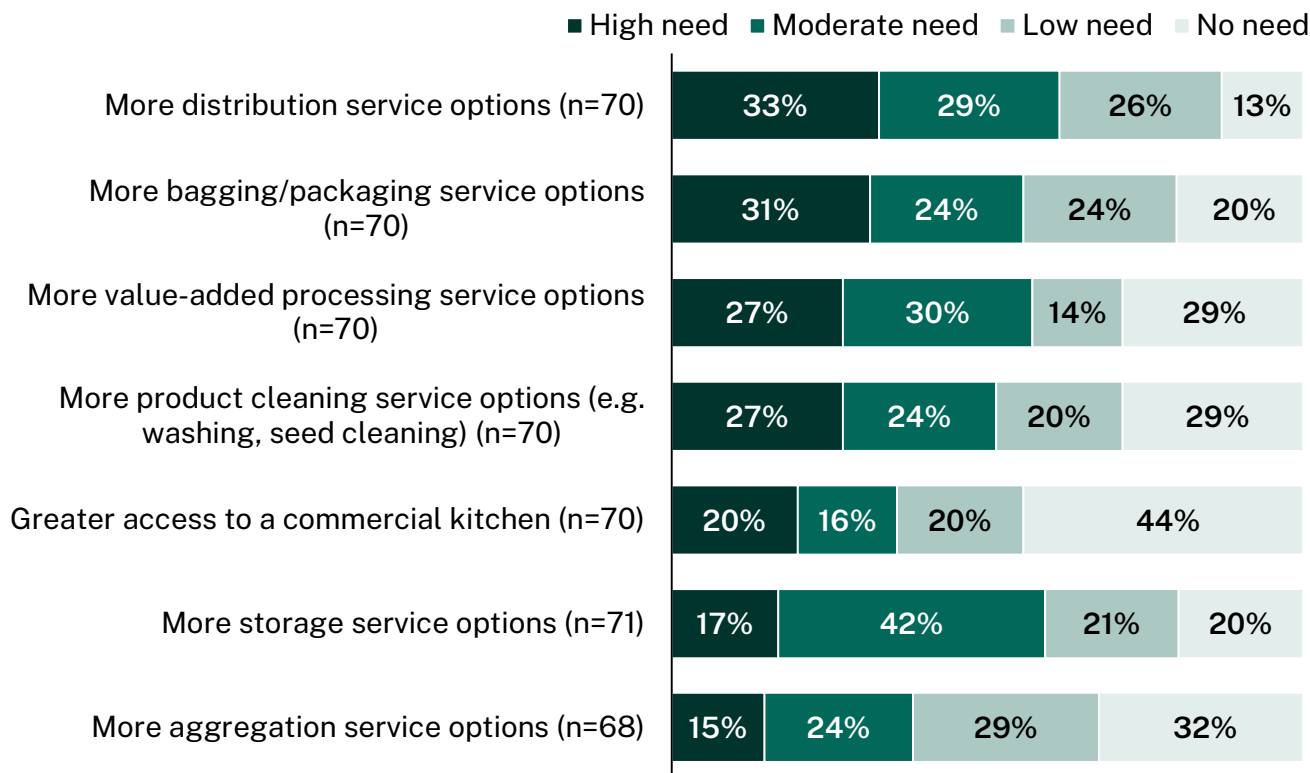


TABLE 44 | Farm and food business survey respondents unedited answers specifying the third-party processors they work with (n=17)

Processor
1000 Springs Mills
Ardent Mills
Ardent Mills
GF Blends, 1000 Springs Mill, MT Gluten Free
Gosar Sausage for flour milling. We grew faro wheat and really struggled couldn't find a dehuller
Grain Millers
Many
Montana Flour and Grain, Timeless Seeds, the oil barn
Montana Flour and Grain
Montana Flour and Grain
Oil Barn, Timeless Seeds, Kamut International
Pardue, Ray, RS Grain, Beach, LSI, Central Valley Ag and many others
Scarrow Meats
Soranco Bean
Sustaina grain, Troubadour maltings
The Teff Company - Milling, packaging, distribution
Varies with the buyer

We asked survey participants how much, if at all, their farm or food business needs select types of infrastructure-related TA and services (Figure 98). The largest proportion of respondents had the highest need for more distribution service options, more bagging/packaging service options, more value-added processing service options (e.g., washing and seed cleaning). Although the majority said their business has high or moderate need for the development of most of the services we asked about.

FIGURE 98 | Infrastructure needs of farm and food business survey respondents that grow or process grains, pulses, and other field crops



TA partners' perspectives on infrastructure

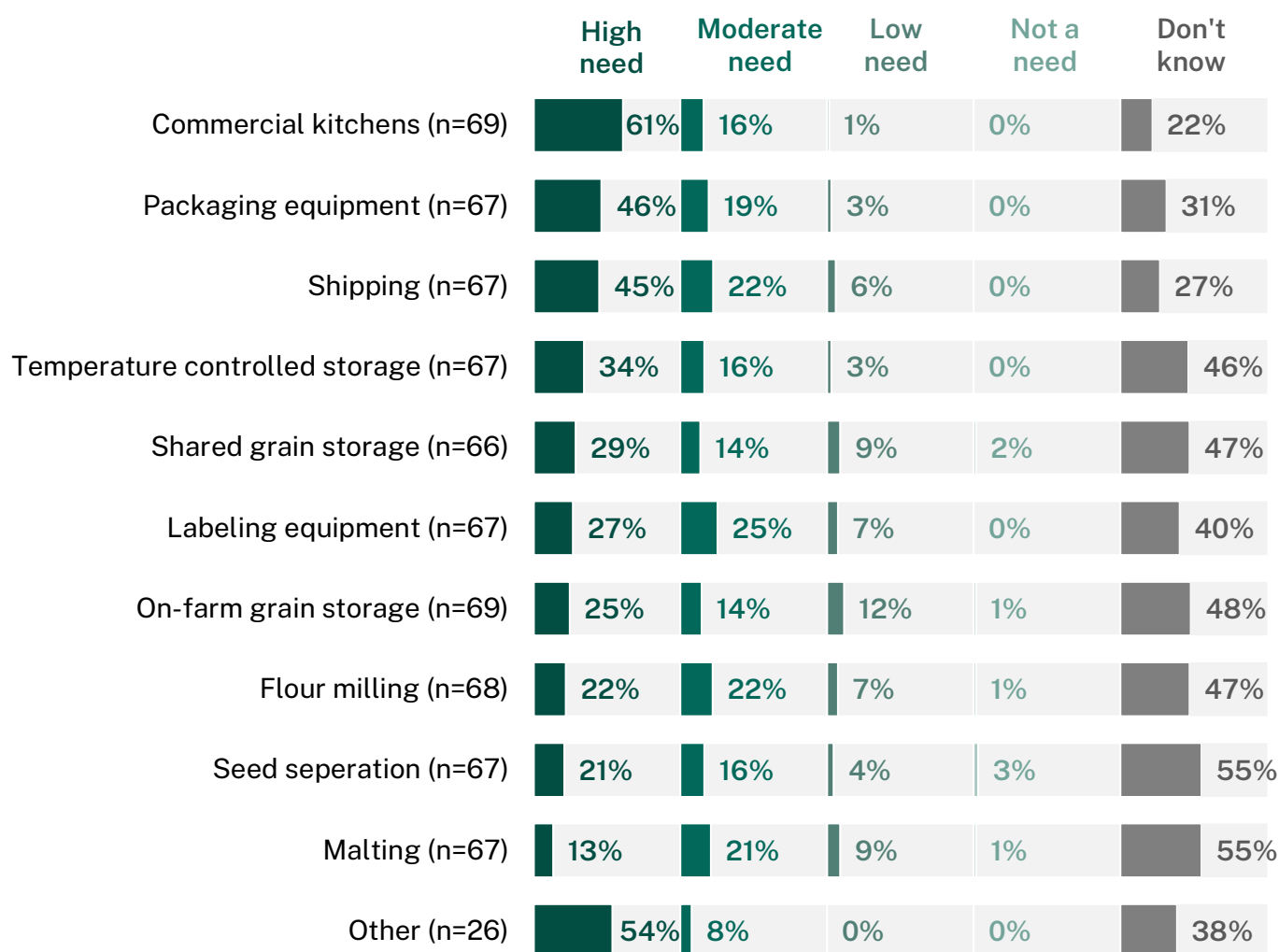
Many TA survey respondents said their organizations provide infrastructure-related services (Figure 71):

- 56% offer value-added processing support (n=75),
- 47% provide distribution services (n=73),
- 41% provide aggregation services (n=73), and
- 34% provide storage services (n=74).

The TA provider survey asked, “When it comes to developing local and regional supply chains for climate-resilient grains and pulses, how much of a need is there to increase the following infrastructure in your service area?” Many TA respondents indicated they do not have an informed

judgment about infrastructure needs for climate-resilient grains and pulses by selecting “don’t know;” however, the majority of those with an informed judgment indicated there is high or moderate need to develop the infrastructure presented. The largest proportion of TA survey respondents said commercial kitchens are the highest need (77%), with 61% reporting a high need and 16% a moderate need (Figure 99). This was followed by packaging equipment and shipping, with 46% and 45% of respondents citing a high need, respectively.

FIGURE 99 | *Technical assistance provider survey respondents’ perspectives on infrastructure needs for developing local and regional supply chains for climate-resilient grains and pulses*



Other responses: Co-packing plant (2), feed mills, delivery, distribution (3), food processing, greenhouses, manufacturing, mid-chain activities like oat-steaming and grain dehulling, organic-specific transportation, outreach and engagement, real estate, research and development of consumer demand, transportation (2).

Livestock integration

The Center aims to empower resilient meat and animal protein supply chains through targeted investment and support. While the Center’s “Building Meat Supply Chain Capacity” core area is beyond the scope of this report, integrating livestock into field crop production is potentially a climate-resilient practice of interest. Therefore, we include this section as the information is relevant to contextualize the potential for row crop producers to integrate livestock they own or that is owned by another operation.

Farms that raise livestock

Table 45 shows the number and proportion of farms that raise livestock within the service area by state. Table 46 shows the distribution of farms that raise livestock by type, state, and substate region. The largest number of farms that raise livestock raise beef cows, although there are also thousands of farms in the region that raise goats, hogs, and sheep. Bison farms are less common, although there are some in all six states.

Rotational or management-intensive grazing

In rotational or management-intensive grazing, operations systematically rotate livestock through fresh forage to optimize quantity and quality of forage growth and to improve manure distribution, wildlife cover, and soil health. Table 47 shows the number and percentage of farms that practice rotational or management-intensive grazing. In the service area, 25,847 farms use this practice (16%). Figure 100 shows the number of farms that use rotational or management-intensive grazing by county.

TABLE 45 | *Distribution of farms that raise livestock by type within the service area by state, 2022. For example, 21% of the service area’s 47,915 farms that raise beef cows are in Colorado.*

State	Beef cows		Bison		Goats		Hogs		Sheep	
	Count	%	Count	%	Count	%	Count	%	Count	%
Service area	47,915	100%	340	100%	7,140	100%	4,379	100%	8,874	100%
Colorado	10,037	21%	110	32%	1,788	25%	1,224	28%	1,480	17%
Idaho	7,379	15%	42	12%	978	14%	562	13%	1,208	14%
Montana	8,653	18%	69	20%	487	7%	347	8%	1,118	13%
Oregon	9,811	20%	33	10%	2,124	30%	1,065	24%	2,709	31%
Washington	7,599	16%	41	12%	1,407	20%	949	22%	1,722	19%
Wyoming	4,436	9%	45	13%	356	5%	232	5%	637	7%

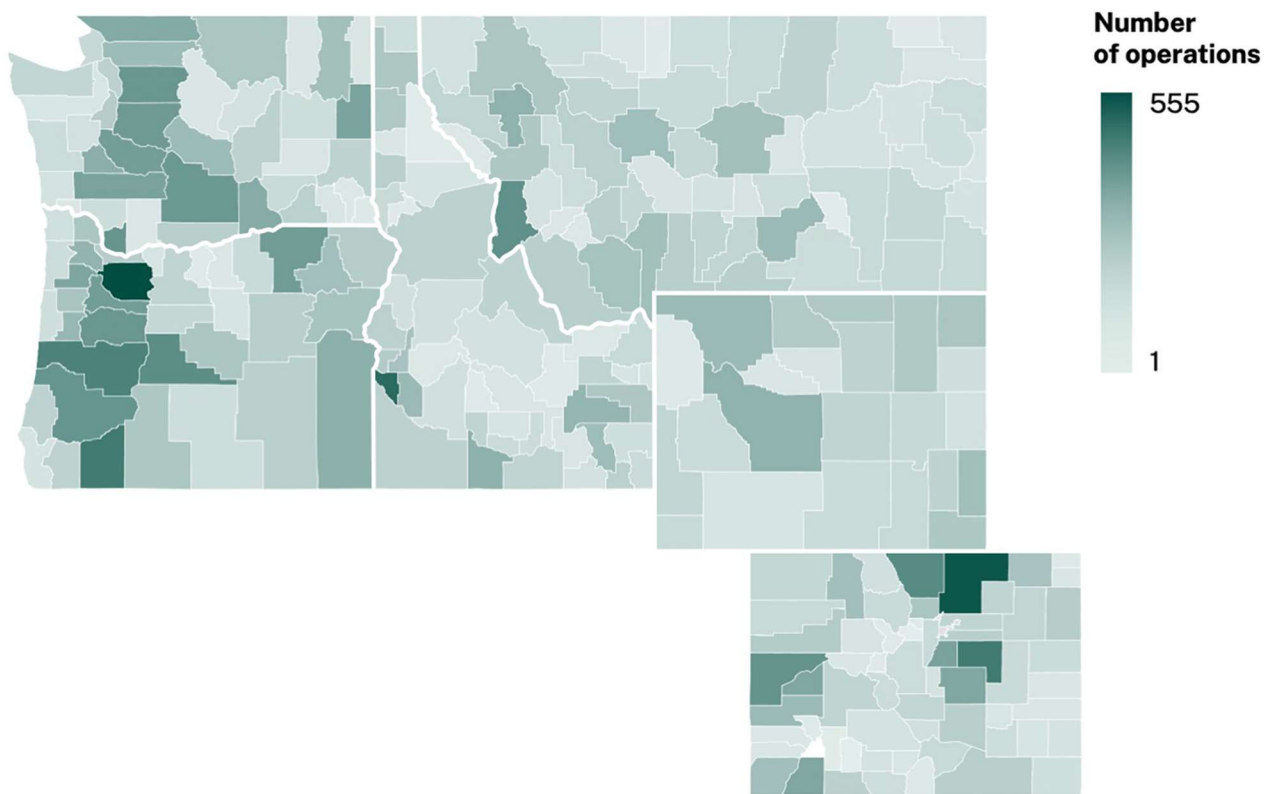
TABLE 46 | *Point-in-time count of farms that raise livestock by type, state, and substate region, end of December 2022*

		Beef cows	Bison	Goats	Hogs	Sheep
	Service area	47,915	340	7,140	4,379	8,874
Colorado	Colorado total	10,037	110	1,788	1,224	1,480
	East Central	2,679	41	456	344	342
	Northeast	2,066	25	483	298	378
	NW and Mountain	1,030	12	157	124	160
	San Luis Valley	501	6	63	50	67
	Southeast	1,479	13	195	94	124
	Southwest	2,282	13	434	314	409
Idaho	Idaho total	7,379	42	978	562	1,208
	East	2,513	14	305	169	320
	North	1,213	8	169	157	255
	South Central	1,332	7	145	76	175
	Southwest	2,321	13	359	160	458
Montana	Montana total	8,653	69	487	347	1,118
	Central	1,635	8	98	71	211
	North Central	1,242	8	35	51	95
	Northeast	1,014	2	26	26	99
	Northwest	1,527	22	159	126	299
	South Central	1,323	15	104	38	183
	Southeast	1,089	6	28	10	116
	Southwest	823	8	37	25	115
Oregon	Oregon total	9,811	33	2,124	1,065	2,709
	North Central	368	2	28	17	48
	Northeast	1,232	1	173	64	177
	Northwest	4,270	12	1169	645	1,617
	Southeast	2,224	15	358	161	340
	Southwest	1,717	3	396	178	527
Washington	Washington total	7,599	41	1,407	949	1,722
	Central	1,626	15	237	157	328
	East Central	641	2	75	34	62
	Northeast	937	5	187	109	173
	Southeast	424	0	72	32	105
	Western	3,971	19	836	617	1,054
Wyoming	Wyoming total	4,436	45	356	232	637
	Northeast	1,211	21	60	59	193
	Northwest	1,048	9	113	60	173
	South Central	572	3	49	46	79
	Southeast	1,114	11	89	47	125
	West	491	1	45	20	67

TABLE 47 | *Number of operations that practice rotational or management intensive grazing by state and substate region, 2022*

		Number of farms	Percent of all farms
Colorado	Service area	25,847	16%
	Colorado total	5,753	16%
	East Central	1,496	16%
	Northeast	1,317	15%
	NW and Mountain	749	21%
	San Luis Valley	174	12%
	Southeast	600	13%
	Southwest	1,417	15%
Idaho	Idaho total	3,615	16%
	East	1,154	15%
	North	649	13%
	South Central	571	16%
	Southwest	1,241	19%
Montana	Montana total	4,141	17%
	Central	759	20%
	North Central	495	12%
	Northeast	303	10%
	Northwest	1,046	20%
	South Central	627	18%
	Southeast	379	21%
	Southwest	532	21%
Oregon	Oregon total	5,700	16%
	North Central	215	13%
	Northeast	693	19%
	Northwest	2,679	14%
	Southeast	1,189	21%
	Southwest	924	17%
Washington	Washington total	4,628	14%
	Central	963	14%
	East Central	286	7%
	Northeast	465	13%
	Southeast	251	10%
	Western	2,663	18%
Wyoming	Wyoming total	2,010	19%
	Northeast	482	19%
	Northwest	554	20%
	South Central	250	20%
	Southeast	496	19%
	West	228	17%

FIGURE 100 | *Number of farms that practice rotational or management-intensive grazing by county, 2022*



Farm and food business survey livestock-related results

Please remember while interpreting the results in this section that this report only includes farm and food business survey respondents who have or want to start a business that grows or processes field crops. Therefore, these results characterize livestock and meat-related topics specifically for respondents who also have or want to have a field crop-related enterprise. If a respondent had a livestock or meat-related business but did not also have or want to have a field crop-related business, then they are not included in these findings.

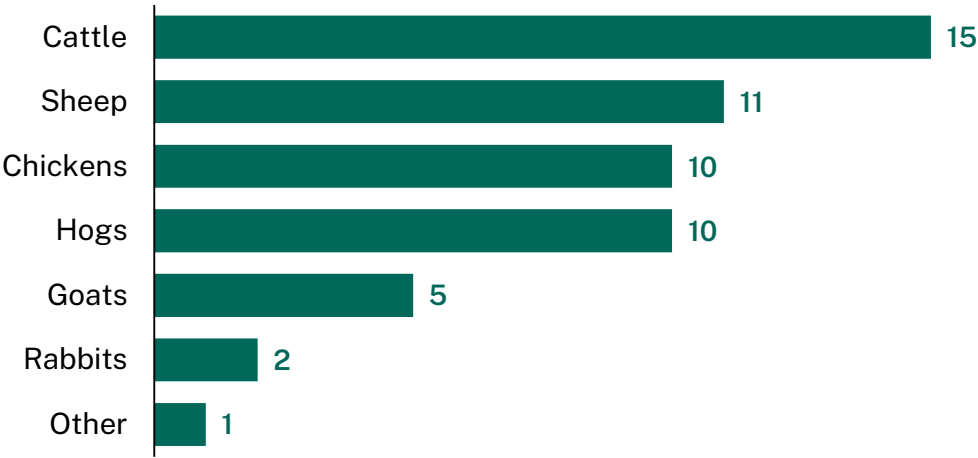
Sixty-nine percent of farm and food business survey respondents who grow or process row crops currently integrate livestock into their row crop production practices (n=35) and 50% use prescribed grazing (n=33) (Figure 50). Six out of 11 row crop producer respondents (55%) who do not already integrate livestock into crop production said they are interested in starting, and eight out of 15 (53%) who do not already implement prescribed grazing said they are interested (Figure 51).

If farm and food business survey respondents indicated that they currently produce or are interested in raising animals, then the survey asked them to specify which type of livestock, poultry, or other animals they currently raise or want to raise (Figure 101). Fifteen farm and food

business survey respondents who produce or process field crops also raise or would like to raise cattle (n=20). Roughly half raise or are interested in raising sheep, chickens, or hogs.

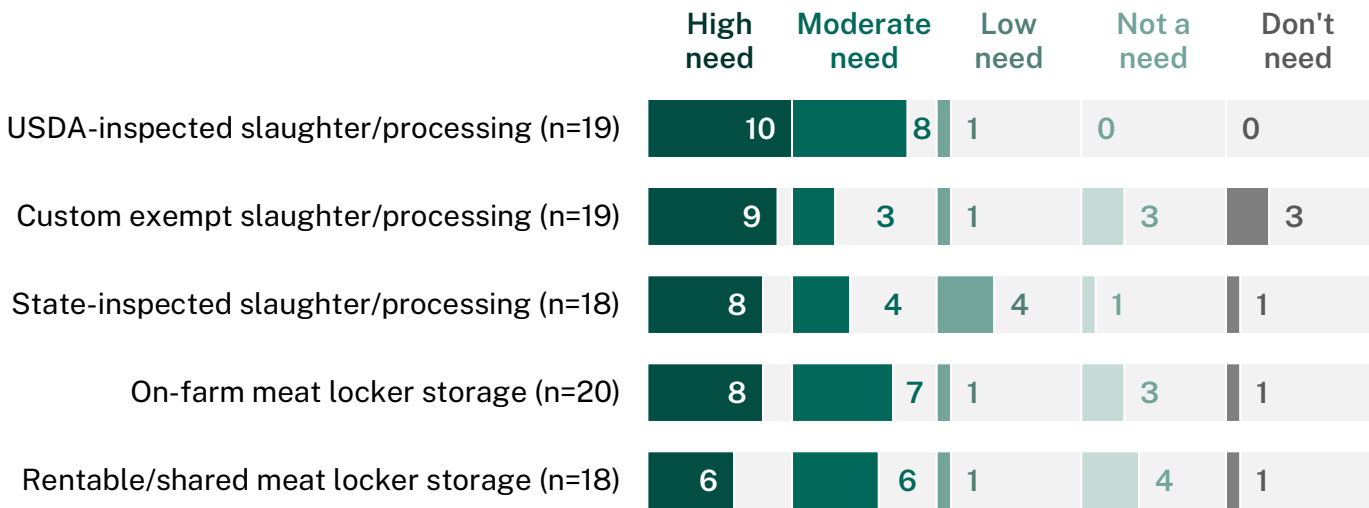
The farm and food business survey asked respondents to assess how much of a need, if any, there is to develop the select types of infrastructure for meat producers in their area. Of the 19 respondents, 10 said USDA-inspected slaughter/processing is a high need, and eight said it is a moderate need in their area (Figure 102). The majority identified all types of meat infrastructure we asked about as either a high or moderate need.

FIGURE 101 | Type of livestock farm and food business survey respondents raise or would like to raise by number of respondents (n=20)



Other responses: Wild horses and/or burros

FIGURE 102 | Farm and food business survey respondents' assessment of the need for development of meat processing infrastructure



The survey asked respondents if they currently have select meat-related third-party certifications (Figure 103). Two respondents have the “Animal Welfare Approved” certification, two have the “Certified Humane” certification, and two have a grass-fed certification. If a respondent said they did not have a given certification, then the survey asked them how interested they are, if at all, in obtaining it (Figure 104). The largest numbers of respondents expressed the greatest interest in obtaining the “Certified Humane,” “Animal Welfare Approved,” and grassfed certifications.

FIGURE 103 | *Third-party certifications used by survey respondents to market meat products*

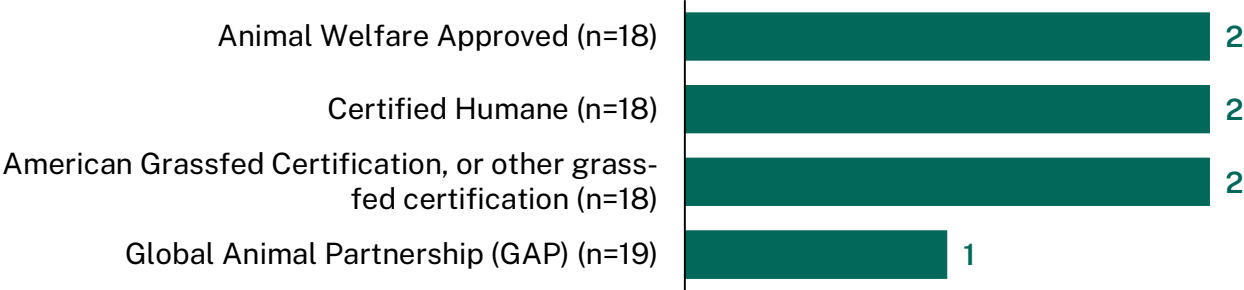
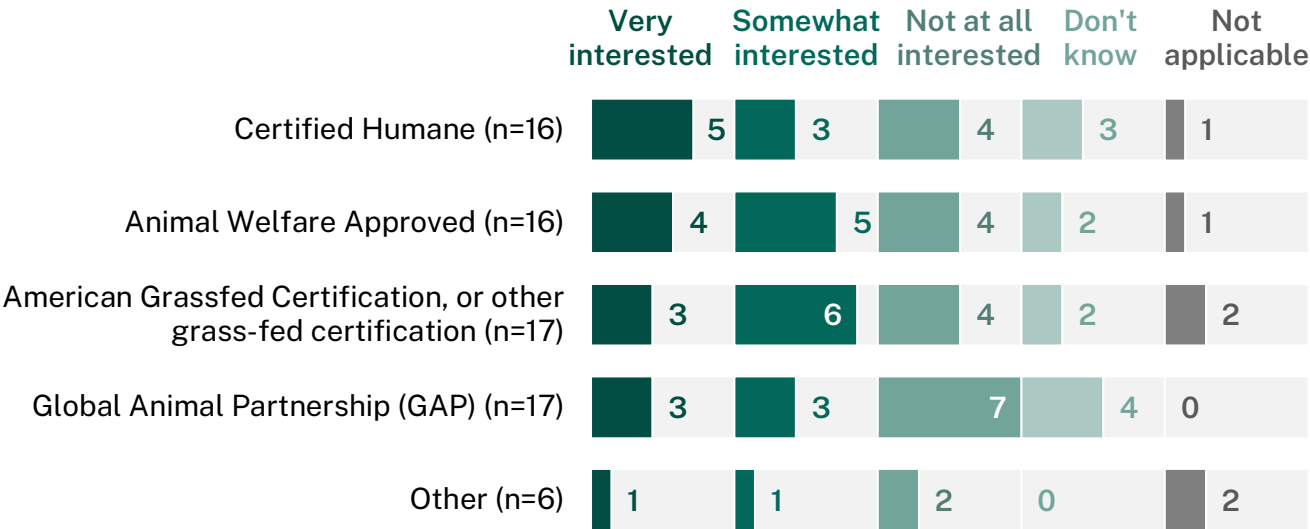
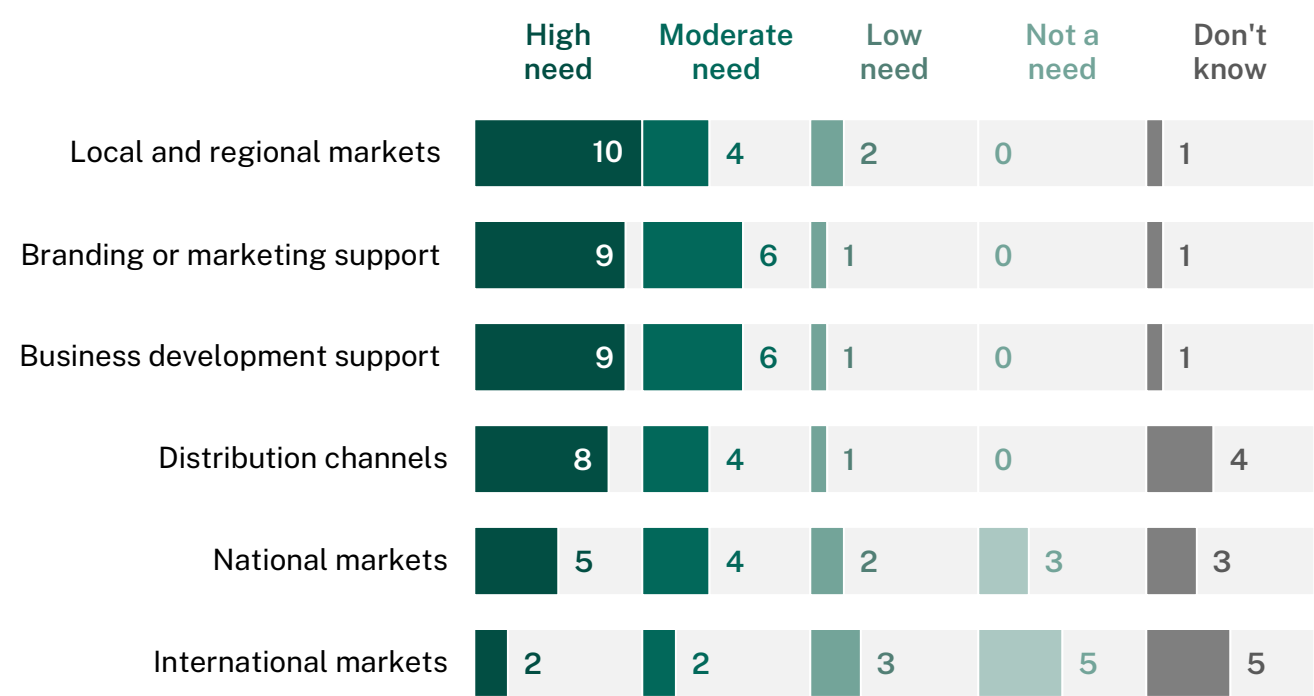


FIGURE 104 | *Survey respondents’ interest in obtaining the select livestock certifications they do not already have*



Respondents were asked about their TA and market development needs to better understand the needs of livestock and meat product producers. Ten respondents said there is a high need for developing local and regional markets for meat products (Figure 105). Other high needs include branding or marketing support (9) and business development support (9) for meat producers and processors. Only two respondents report that developing international markets is a high need.

FIGURE 105 | Survey respondents’ level of need for market development and other support for meat producers/processors, by number of respondents (n=17)



The survey included open-ended questions to allow respondents to clarify and add context to their responses. We asked them to list what they think are the most important priorities specific to technical assistance, supply chain, market, and infrastructure development that the Center should invest in to support the success of livestock and meat-related businesses. Responses are organized by theme in Table 48 and provided fully in Appendix B.

TABLE 48 | Themes from farm and food business survey respondents’ perspectives on TA, supply chain, market, and infrastructure priorities for livestock and meat processing businesses

Theme	Example quote(s)
Infrastructure	"Capital improvements such as infrastructure for on-farm storage and retail. Freezers, buildings, etc."
	"Post-slaughter infrastructure for storage, transport and direct sales of meat and animal products."
	"Infrastructure development."
Markets	"Improve markets for local meat. This could include marketing done on a larger scale to support regional food sources, but this could also include support to producers to develop business plans and marketing messaging to increase sales."
	"Market development." (n=4)

Theme	Example quote(s)
	"Local market development."
Business assistance	"More help for small meat producers to understand and apply for grants and loans." "Help setting up operating and businesses plans for small producers." "Getting a business started."
USDA-inspected	"The area needs more USDA or State inspected slaughter facilities and more processing facilities and trained workers for those facilities." "More affordable USDA Meat inspectors for small meat butcher shop and processing plants." "USDA inspection certified meat processors closer to our area. Closest is 45 minutes away." "USDA plants are struggling to get employees in the door and keep prices down to customers. Employee training and education in this space is a huge hinderance and when these old shops shut down then they won't re-open. So many "New" shops opened and closed already in the last 3 years, we need to support our workforce and the shops that are already here and working."

Technical assistance provider survey responses regarding meat-related enterprises

Key informant interviewees that provide TA to livestock producers and meat processors were asked during individual interviews about the primary issues and barriers facing their clients and the regional meat supply chain. Table 49 summarizes their responses by theme. The most common topic mentioned was the need for workforce development in the meat supply chain. Other themes include food security concerns, lack of processing infrastructure, the need for increased marketing assistance, and waste management.

TABLE 49 | *Primary themes from key informant interviews related to regional meat supply chain issues and barriers (n=15)*

Theme	Example quote(s)
Processing	"We get very few inquiries now from startups with the exception of some tribes that are wanting to look into processing, but most people have come to their senses and realize that it's not a good time right now to open up new processing facilities. So now we are doing a lot more triage. My team is focusing on trying to keep people in business...So that's kind of where our energy has changed."
	"They need processing facilities.... They need to have better processing than what we have now is basically sending it out of state and getting on a long waiting list and paying a lot of money. So, if we get local processing, that would really help our farmers and ranchers."
Workforce development	"Yeah. I think it'd be cool for USDA to figure out some type of workforce program before creating some other type of grant for meat capacity. You can't have meat capacity without people to inspect it."
	"I think honestly, more investment in training, butchery training, animal handling training, both for farmers and processors so we can humanely handle animals."
	"One thing about these farm-to-institution and farm-to-school and different programs like that, it's really difficult for small and medium-sized farmers and ranchers to access those because of a longstanding agricultural labor issue we have. And so, most of our farms...can't produce at a level to be able to sell to institutions."
	"Good management, I can't put enough emphasis on people. We have to have good workers that are willing to do that work consistently every day. We have to have good managers that are sticking with the project. High turnover is really hard on any project, especially food processing. If you have a high turnover, especially in managers, we see a lot of challenges in that, and you're constantly retraining somebody, so you can't get to profitability or even break-even status when you're constantly turning over people. We have to have some good continuous personnel for that business to be sustainable."

Theme	Example quote(s)
Food security	"There are more tribes in 2024 looking at food security projects than there were in 2023...It's been a steady increase in tribal food production. Where we were back in '16 and '17 is a pretty phenomenal increase to where we are today. Today, we have about a dozen tribal meat processing plants that are operational, and I project that over the next five years we'll have another 50." "I think we see a lot of emphasis in rural America and food security as well for the community and wanting to see that connection of production to consumption, and now that meat to market offers that, but there's the need for...a different type of business structure and it is running different. It's running a separate business under the same umbrella, and so you have producers who are really good at producing, but to engage in that direct market access opportunity there, that's a whole new learning curve. So basically, you need a full course, which is why we did that and emphasize that." "[It] gets frustrating sometimes where I think the small and medium supply processors can be overlooked on the bigger picture from some of these funding sources when we see them as crucial to our small communities, because that is where they go to, they raise the cattle, that's where they go to butcher it to feed their families for the year."
Marketing and certifications	"We've done a couple webinars on third-party certifications... The interest kind of ebbs and flows. Some labels are popular for a while and then they kind of get replaced by something else. And right now, it seems to be regenerative is the buzzword, but yet there's no certification for it. And it just is a word that doesn't really mean anything. Seems to have replaced the generic word natural, which also doesn't mean anything. So, I don't know. I think a lot of producers don't want, and processors don't want to pay for additional certification if it's not going to get them any new market share. And I think consumers are kind of confused right now and rightfully so. I don't really know what to say around certifications. I think if you are going to wholesale where you're not interacting with the end consumer certifications probably are important to kind of tell your story since you don't get to tell the story yourself. But if you're direct marketing, you can tell that story. And I don't think certifications are as important in that regard."
Waste management	"Waste management is definitely an issue, and I wish more people would see, I wish more funders would see waste management as a part of the supply chain because...that would be, I think, a case for the Climate Smart group because it's all about efficiencies and food handling safety and not wasting anything."

We also asked technical assistance provider survey respondents, "From your perspective, what are the 1-3 most important technical assistance priorities the Northwest and Rocky Mountain Regional Food Business Center should invest in to support meat businesses and supply chains in your service area?" Figure 106 displays primary themes that emerged from this open-ended question, and Table 50 provides example responses organized by theme. Appendix B provides a list of all unedited responses.

FIGURE 106 | Primary themes from TA provider survey respondents’ assessment of the 1-3 most important TA priorities the Center should invest in to support meat businesses and supply chains (n=48). For example, 31% respondents mentioned processing facilities in their answer.

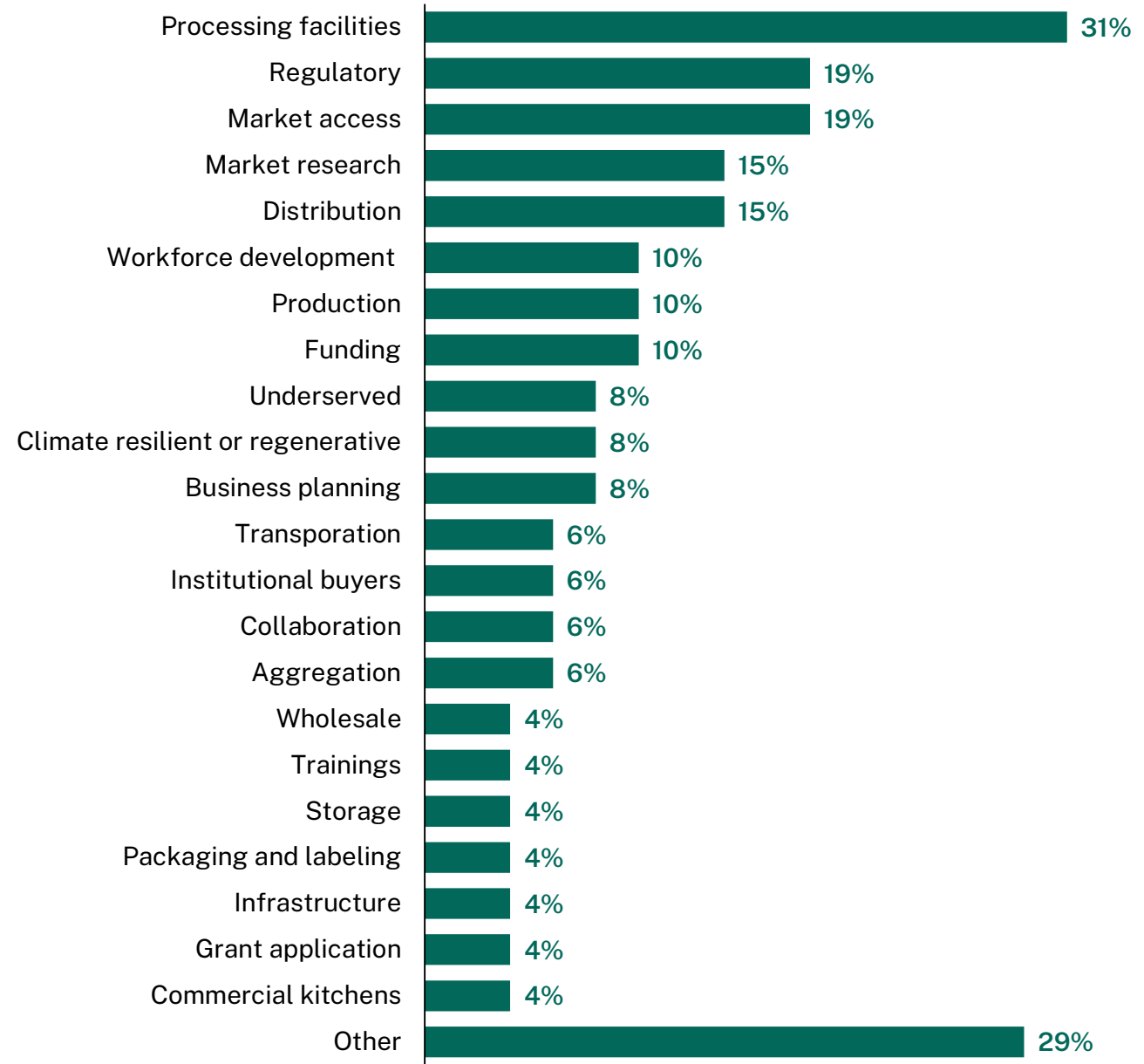


TABLE 50 | *Primary themes from TA provider survey respondents' assessment of the 1-3 most important TA priorities the Center should invest in to support meat businesses and supply chains (n=48)*

Theme	Example quote(s)
Distribution	"Distribution: Make it easier for small business to get meat products from distributors." "Distribution and marketing of final product beyond the Meat Depot/local efforts - a joint meat marketing system would be great (a cooperative perhaps)."
Funding	"There is technical assistance available- it is the funding for infrastructure development that is lacking." "Funding and fund development." "Equipment funding/Lean manufacturing techniques."
Market access	"Understanding access to market premiums." "Accessing Markets." "Increased business planning support for small ranchers/meat businesses (esp. BIPOC-owned) to increase price competitiveness and access new markets."
Market research	"Identify niche markets for product marketing." "Market pricing tools or resources." "Supporting producers in navigating market potential (e.g. What will customers buy regularly)."
Processing facilities	"Community based, owned, and governed processing facilities." "Developing small scale USDA processing facilities." "Processing facilities: Help establish relationships with local meat processing centers." "Small processing accessibility."
Regulatory	"Improve education regarding regulation standards." "Understanding regulations." "Help navigate both local and federal regulations." "Assist those projects with whatever they need to wade through the regulatory process."
Workforce development	"Workforce development" "...meat cutters for more value-added production." "Butcher training."

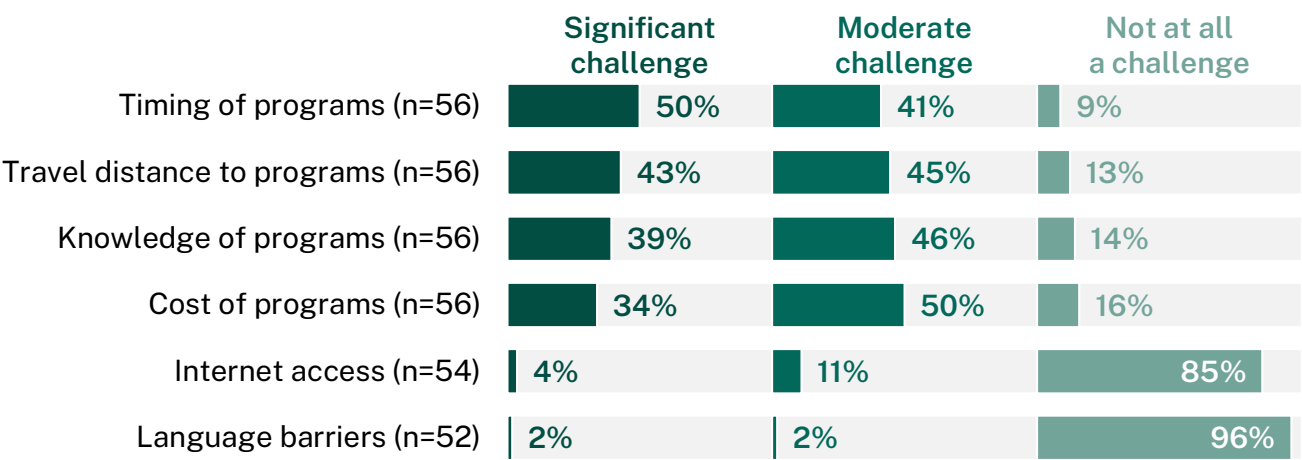
Connecting and scaling food entrepreneurs

The Center’s “Connecting and Scaling Food Entrepreneurs” core area “aims to distribute technical assistance and capacity building through partners and existing resources to support the connection and scaling of food enterprises.”³ While the entire report is relevant to this core area, in this section we present the findings specific to current challenges accessing TA, types of outreach desired and provided, and TA providers’ hopes for and interests in partnering with the Center.

Farm and food businesses’ challenges accessing TA

We asked farm and food business survey respondents to what extent, if at all, they experience select challenges to accessing TA for their business (Figure 107). Half of respondents cited program timing as a significant challenge, which may relate to the seasonality of farm and food businesses or the time-of-day programs are offered. One respondent offered this suggestion in an open-ended response: “Recording available for trainings because they are not always held when we can attend.” While most respondents did not identify language barriers as a challenge, only three of the 91 respondents opted to take the survey in Spanish and language barriers are a significant or moderate challenge for 4% of respondents.

FIGURE 107 | Farm and food business survey respondents' challenges in accessing technical assistance



TA providers commonly cited technology and internet barriers to better serving rural audiences. However, 85% of farm and food business survey respondents said internet access is not a challenge for them at all when it comes to accessing technical assistance for their business. Together these findings suggest there is a need for multiple types of outreach — from in-person and printed materials to webinars and web-based materials — to best serve diverse audiences. Many but not all farm and food businesses in the service area have access to reliable or high-speed internet.

³ <https://nwrockymountainregionalfoodbusiness.com/scaling-food/>

Outreach farm and food business survey respondents are interested in

Farm and food businesses that grow or process grains, pulses, and other field crops expressed interest in a variety of resources and types of outreach, including online workshops, field days, and printed resources (Figure 108). There is an audience for all of the types of outreach included on the survey; however, the largest proportions expressed the greatest interest in one-on-one advising, mentoring, or business coaching; networking opportunities with other farm/food businesses; a directory of TA providers; and online workshops, classes, and webinars. Social media is the type of outreach the greatest proportion (56%) said they are not at all interested in.

FIGURE 108 | Farm and food business survey respondents' level of interest in different resources



Other responses: Co-op development, let us run and access our own resources, Must be time efficient, Only interested in these things if they are in my region, Phone interactions.

Additionally, respondents identified priority areas for investment by the Center to support businesses that grow or process ‘climate resilient’ grains and pulses. Table 51 summarizes these priorities by theme, with unedited responses available in Appendix B.

TABLE 51 | *What farm and food business survey respondents report are the most important technical assistance, infrastructure development, supply chain, or market development priorities the Center should invest in to support businesses that grow or process climate-resilient grains and pulses (n=34)*

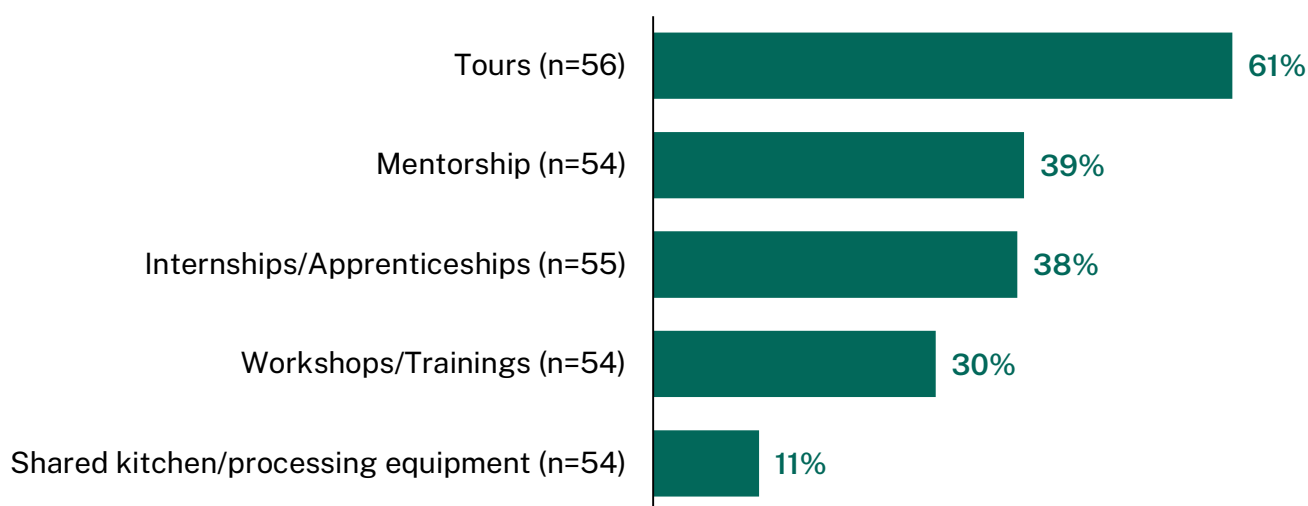
Theme	Example quotes
Agronomic assistance	"Education on climate smart growing practices, Assistance with climate smart growing practices, testing to prove they are climate smart." "Access to agronomists that can manage field trials for our farm." "Precision Organic Agriculture technical assistance." "Regenerative organic cropping practices."
Broker	"A common and shared broker or sales rep that can develop relationships with all the regional partners for climate-resilient crops." "Marketing person for finding mills or bakers that we can sell to direct." "Marketers that small companies can all share to help get their products to the next level."
Equipment	"Assist mills, cleaners and co-packers with packaging equipment." "Develop or access cleaning, bagging, milling and transport services." "Infrastructure equipment - threshing, winnowing, milling, seed separation, drying, cold storage, packaging." "Equipment needed to grow, harvest, and clean."
Distribution	"Efficient distribution systems for ingredients and end products." "Support for distribution." "Improved regional distribution networks."
Grants	"Help Food Hubs expand and give them grants to allow them to get more CR products get to market." "Grant to assist with compostable packaging." "Grants that are either paid up front or reimbursable with easy to find and agreeable loan terms."
Institutions	"Easy to access/navigate requirements for reaching and selling to institutions." "Better connections to restaurants, university food programs and retirement communities."

Theme	Example quotes
	"Help getting school districts involved in supporting CR local products in forms that they can readily use."
Storage	"Access to warehousing- possibly shared area." "Subsidies or support for Grain storage bins." "Storage."
Value-chain	"I feel sometimes that I am undergoing an impossible task to compete with giants, or it is unreasonable for a very small operation to efficiently process grain for human consumption. It would be helpful to learn about other small and niche-market operations rather than trying to replicate the operations of international wheat, soy, corn companies." "Market opportunities for end products made with mission-aligned ingredients / supply chains."

TA farm and food business survey respondents are providing

The Center and other organizations can also partner with farm and food businesses “to distribute technical assistance and capacity building...[and] to support the connection and scaling of food enterprises.” For example, some farm and food business survey respondents offer technical assistance opportunities and resources for their peers, including tours, mentorship, apprenticeships, and workshops (Figure 109). Engaging businesses is a strategy the Center and partners can use expand reach, strengthen connections, and link business owners to valuable resources (such as one-on-one mentorship) they seek.

FIGURE 109 | *Resources and opportunities offered by farm and food businesses survey respondents*



TA provider perspectives on partnering with the Center

When asked, "Is there a specific technical assistance need or gap you hope the Center will fill or be uniquely suited to provide?", key informant interviewees often mentioned the need for the Center to play a connector and resource navigation role:

"Yeah, definitely being that connector is already...one key thing. I think just bringing people together. I think better understanding of grant opportunities and funding opportunities and housing that [information] in one place would be valuable."

"I think one of its biggest values is just knowing what each other's doing a lot more than before and being able to find the right program or technical assistance provider for the client."

Findings from the TA provider survey and inventory confirm there are many existing organizations, resources, and relationships the Center can support, expand, and leverage. TA provider survey respondents' organizations provide support resources in a variety of formats, including in-person training, online resources, and one-on-one advising (Figure 110). Furthermore, 93% of TA provider survey respondents are interested in partnering with the Center and another 6% simply said they don't know if they are (Figure 111) and 75% said they have either moderate or high capacity to increase the number of clients they serve per year (Figure 112).

FIGURE 110 | Type of support TA provider survey respondents' organizations provide. Respondents could select more than one response (n=79)

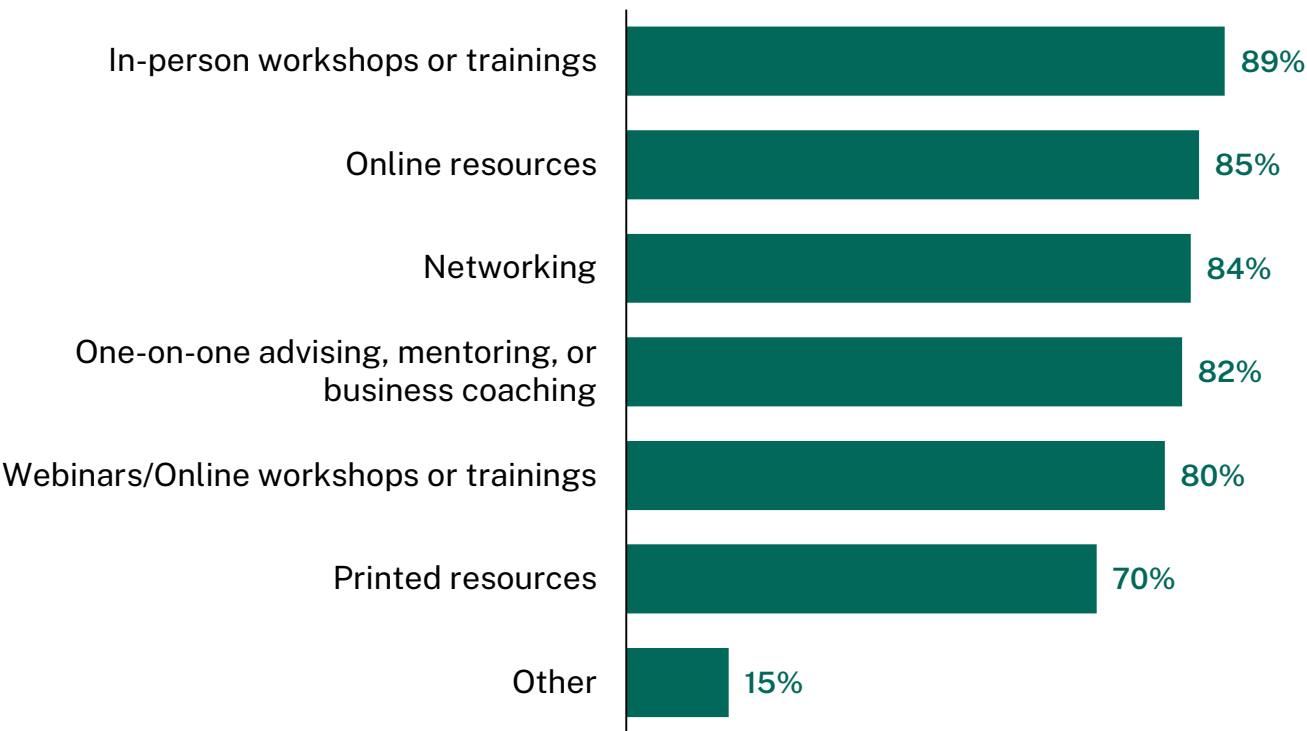


FIGURE 111 | *Percentage of technical assistance provider survey respondents that are interested in partnering with the NW and Rocky Mountain Food Business Center (n=68)*

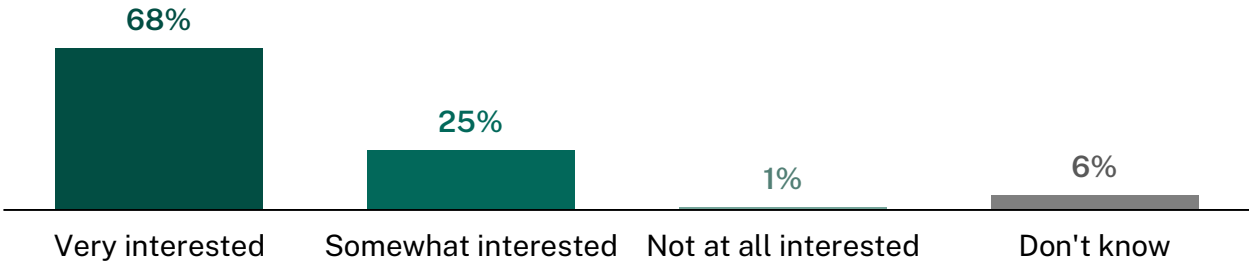
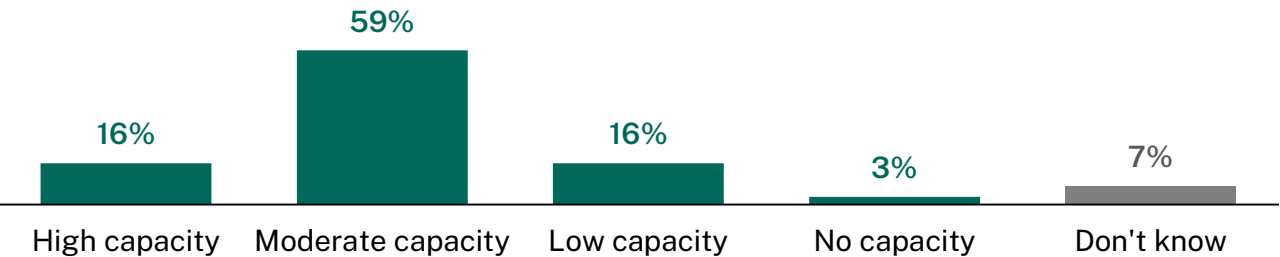


FIGURE 112 | *Level of capacity TA survey respondents said their organizations have to increase the number of clients they serve per year (n=70)*



TA provider survey respondents were also asked the open-ended question, "What would your organization most hope to gain from partnership with the Northwest and Rocky Mountain Regional Food Business Center?" Table 52 lists examples of respondent's answers organized by theme and the full list of responses is included in Appendix B. Collaboration and networking opportunities were a common refrain, as well as assistance with building capacity of organizations through business support, funding, and prioritizing underserved audiences. This suggests a need for coordination amongst technical assistance providers, as well as organizational structure and communication. A need to develop more community among TA providers was expressed, including conferences, workshops, connection to clients, and collaborative projects.

TABLE 52 | *Primary themes related to what TA survey respondents said they most hope to gain from partnering with the Center (n=61)*

Theme	Example quote(s)
Business development support	"We have production and value-chain technical assistance dialed in for our producers, but we lack business and financial planning services for farmers in the area."
	"We'd like to gain visibility for what WY has to offer for food businesses. Technical assistance would be great too- business development and planning, pricing, really anything that can help scale some of our home producers."
	"Establishment of needed Ag business support."

Theme	Example quote(s)
Capacity building	"Building larger capacity to support our mission in the region." "Developing internal capacity or strengthening external connections with support organizations for all of the topics within this survey." "Provide capacity building support for partners and communities."
Collaboration	"Collaborating to accomplish the goals and objectives of building a secure, sustainable, healthy, and equitable regional food system." "Collaboration among meat/poultry processors and other food businesses in the region." "Collaboration and partnership. We are very interested, at the same time, realize we all have a heavy workload, and it may take time."
Funding	"Enhanced Resources: Access to financial and technical resources to support and grow our programs and services." "Financial backing and industry connections." "Additional resources for our livestock producers especially in finance."
Networking	"Networking support, assistance in communicating our work and desire to collaborate with food businesses, collaboration on development of processing infrastructure opening opportunities with buyers who need the mid-step." "Resources and networking opportunities."
Underserved audiences	"Helping our ag women business owners in even more / better ways." "Open to any opportunities available that could help support veterans in agriculture." "We would hope to gain more support/aid for BIPOC farmers in Oregon."
Need to know more	"At this point I am not really sure what you do, so let's start there. We are always collaborating with local and regional partners - we all need to work together to improve the food system and support small farms." "I would need to learn more about the goals of the center and what resources they have available."

Appendix A: Counties in each substate region

TABLE 53 | *List of Colorado substate regions and corresponding counties*

Colorado					
East Central	Northeast	NW and Mountain	San Luis Valley	Southeast	Southwest
Adams	Boulder	Chaffee	Alamosa	Baca	Archuleta
Arapahoe	Broomfield	Clear Creek	Conejos	Bent	Delta
Cheyenne	Jefferson	Eagle	Costilla	Crowley	Dolores
Denver	Larimer	Gilpin	Mineral	Custer	Garfield
Douglas	Logan	Grand	Rio Grande	Fremont	Hinsdale
El Paso	Morgan	Gunnison	Saguache	Huerfano	La Plata
Elbert	Sedgwick	Jackson		Las Animas	Mesa
Kiowa	Weld	Lake		Otero	Montezuma
Kit Carson		Moffat		Prowers	Montrose
Lincoln		Park		Pueblo	Ouray
Phillips		Pitkin			San Juan
Washington		Rio Blanco			San Miguel
Yuma		Routt			
		Summit			
		Teller			

TABLE 54 | *List of Idaho substate regions and corresponding counties*

Idaho			
East	North	South Central	Southwest
Bannock	Benewah	Blaine	Ada
Bear Lake	Bonner	Camas	Adams
Bingham	Boundary	Cassia	Boise
Bonneville	Clearwater	Gooding	Canyon
Butte	Idaho	Jerome	Elmore
Caribou	Kootenai	Lincoln	Gem
Clark	Latah	Minidoka	Owyhee
Custer	Lewis	Twin Falls	Payette
Franklin	Nez Perce		Valley
Fremont	Shoshone		Washington
Jefferson			
Lemhi			
Madison			
Oneida			
Power			
Teton			

TABLE 55 | *List of Montana substate regions and corresponding counties*

Montana						
Central	North Central	Northeast	Northwest	South Central	Southeast	Southwest
Broadwater	Blaine	Daniels	Deer Lodge	Big Horn	Carter	Wibaux
Cascade	Chouteau	Dawson	Flathead	Carbon	Custer	Beaverhead
Fergus	Glacier	Garfield	Granite	Park	Fallon	Gallatin
Golden Valley	Hill	McCone	Lake	Stillwater	Powder River	Jefferson
Judith Basin	Liberty	Richland	Lincoln	Sweet Grass	Prairie	Madison
Lewis And Clark	Phillips	Roosevelt	Mineral	Treasure	Rosebud	Silver Bow
Meagher	Pondera	Sheridan	Missoula	Yellowstone		
Musselshell	Teton	Valley	Powell			
Petroleum	Toole		Ravalli			
Wheatland			Sanders			

TABLE 56 | *List of Oregon substate regions and corresponding counties*

Oregon				
North Central	Northeast	Northwest	Southeast	Southwest
Gilliam	Baker	Benton	Crook	Coos
Hood River	Umatilla	Clackamas	Deschutes	Curry
Morrow	Union	Clatsop	Grant	Douglas
Sherman	Wallowa	Columbia	Harney	Jackson
Wasco		Lane	Jefferson	Josephine
		Lincoln	Klamath	
		Linn	Lake	
		Marion	Malheur	
		Multnomah	Wheeler	
		Polk		
		Tillamook		
		Washington		
		Yamhill		

TABLE 57 | *List of Washington substate regions and corresponding counties*

Washington					
Central	East Central	Northeast	Southeast	Western	
Benton	Adams	Ferry	Asotin	Clallam	Pacific
Chelan	Douglas	Pend Oreille	Columbia	Clark	Pierce
Kittitas	Franklin	Spokane	Garfield	Cowlitz	San Juan
Klickitat	Grant	Stevens	Walla Walla	Grays Harbor	Skagit
Okanogan	Lincoln		Whitman	Island	Skamania
Yakima				Jefferson	Snohomish
				King	Thurston
				Kitsap	Wahkiakum
				Lewis	Whatcom
				Mason	

TABLE 58 | *List of Wyoming substate regions and corresponding counties*

Wyoming				
Northeast	Northwest	South Central	Southeast	West
Campbell	Weston	Albany	Converse	Lincoln
Crook	Big Horn	Carbon	Goshen	Sublette
Johnson	Fremont	Natrona	Laramie	Teton
Sheridan	Hot Springs	Sweetwater	Niobrara	Uinta
	Park		Platte	
	Washakie			

Appendix B: Open-ended survey responses

In this appendix we provide all the unedited responses to open-ended survey questions for which the full number of responses were too many to include them all in the main report.

TA provider survey

What is your organization's mission? (n=91)

- Advocate for the local food system. To support the food system and bring producers to market.
- agriculture education
- Aiding, assisting, and mentoring Veterans and Service Members in their transition into farming, ranching, Ag Careers as beginners or journeymen.
- Bohemia Food Hub develops equitable economic opportunities to explore, start, and grow small food businesses in a supported environment.
- Build community and economic capital in Central Montana.
- Capitol resource access to low-income Native American communities.
- Create economic development opportunities for Wyomingites.
- Cultivate a resilient food system for Gunnison Valley, CO by enhancing healthy connections between earth, food, and community.
- Engaging people, organizations, and communities to advance knowledge, economic well-being, and quality of life by fostering inquiry, learning, and the application of research.
- Extension brings research based educational opportunities to residents, businesses and communities.
- Finance agriculture operations.
- Focused on sustaining and growing our region's vibrant economy and outstanding quality of life, Big Sky Economic Development provides leadership and resources for business creation, expansion, retention, new business recruitment and community development.
- Food product development at Montana State University
- Give Veterans the skills to enter agriculture fields.
- Help entrepreneurs in Fremont County
- Help small business entrepreneurs achieve maximum success with their businesses.
- Helping our constituents manage natural resources
- Making business ownership possible for all
- Making visible the relationships that allow life to thrive on the Northern Great Plains.
- NWNC is a deliberate reimagining technical assistance chamber dedicated to providing technical assistance, advocacy, and networking opportunities for Native entrepreneurs across the Pacific Northwest.
- Our mission is to contribute to a vibrant rural economy by providing consulting, training, financing, referrals and other assistance to businesses, entrepreneurs, local governments and non-profit organizations in Northeast Oregon.

- Our Mission is to deliver wrap-around services and a navigation network hub for veterans, active-duty military personnel, and their families, providing community resources for education, housing, entrepreneurship, workforce management, family, and wellness services.
- Our mission is to foster the local food community and promote a culture of stewardship. We will achieve this by cultivating farmer-consumer relationships, promoting the enjoyment of healthy food through education, increasing food security through diversity, and enhancing overall community sustainability. To create sustainable farmers while creating access to locally grown foods
- Our mission is to grow and connect a vibrant community centered grain economy in the state of Colorado.
- Our mission is to help rebuild the local food network in Fremont County.
- Our mission is to Improve the Local Food system of our region.
- Our nonprofit helps people start, grow, and sustain a business.
- our primary focus is to reach out and establish connections with communities throughout Idaho. We actively support and facilitate local events, build relationships with community advocates, and prioritize engagement with our community members. Our goal is to listen to their needs and connect them with valuable resources. We are dedicated to actively engaging with Black business owners, providing technical assistance, and offering entrepreneurial training. Additionally, we aim to educate the overall community about the rich and diverse Black culture and the Black community in Idaho.
- Our mission is to promote and develop cooperatives to meet the economic and community needs of Montana.
- Preserving the best of the West's wide open spaces, fish and wildlife habitat, and farming and ranching heritage by providing sustainable solutions that promote environmental stewardship and rural economic prosperity. We accomplish this by advocating, teaching, and incentivizing regenerative ranching practices.
- Promote, connect, and educate Idaho producers to help them grow their marketplace
- Provide tools and guidance to help small businesses grow.
- Rebuilding the local food network in Fremont County
- Represent the collective interest of our members by promoting, informing, supporting and continuously improving the Small Business Development Center (SBDC) network, which delivers nationwide.
- Resilience on working lands
- RMFU's mission is to strengthen our member voices through education, legislation, and cooperation.
- Rogue Farm Corps' mission is to train and equip the next generation of farmers
- RVFSN fosters connections to promote a more equitable, economically viable and ecologically sound food system in the Rogue Valley.
- RVFSN fosters connections to promote equitable food access, ecologically sound agriculture practices, and economic viability.

- Seattle Good Business Network is a community-based economic development nonprofit that unites businesses and community partners around shared values of economic, social, and environmental justice by connecting them to opportunities, resources, and each other.
- Soil and water conservation district
- Support local producers by providing a fresh and local food sales outlet to our food insecure region.
- Sustainable Connections advances a regenerative local economy that builds community, strengthens food systems, catalyzes climate solutions, and expands access to housing in NW Washington.
- The Idaho Hispanic Foundation is a business incubator in Idaho invested in the development of small business and entrepreneurs through business education, workforce, leadership, and personal development.
- The Idaho Small Business Development Center ("Idaho SBDC") accelerates business success through no-cost business consulting and coaching services and low-cost or no-cost training programs.
- The mission of Idaho APEX is to enhance national resilience by fostering a robust supply chain in federal & state contracting.
- The mission of the Puget Sound Food Hub Cooperative is to support and champion local, family scale farms by providing a direct connection with buyers in our region seeking high quality, locally produced food.
- The Port of Columbia's mission is to maximize public resources and private investment to create jobs, provide infrastructure, and maintain and improve the economic vitality of Columbia County and its communities.
- The resources you need to grow and prosper in Eastern Montana.
- The Washington State University Food Systems Program integrates multidisciplinary expertise across extension, research, and teaching, offering specialized resources for strengthening the sustainability of Washington's food and farming systems.
- The Wave Foundation (TWF) collaborates with a coalition of private, public, and community-based partners to address the interrelated challenges of equity and climate.
- Through innovation and discovery, education and advocacy, WSU Breadlab is leading the movement to put nutrition and sustainability at the center of our conversation about food.
- To assist small business owners in Montana through the life-cycle of their business.
- To be a central location for food and food resources across Montana
- To bring University resources to the public
- To empower Colorado businesses to thrive
- to foster community economic development primarily through the cooperative enterprise model.
- To further enhance Montana agriculture and support local food production and entrepreneurs.
- To grow wages and increase opportunity in our region.
- To help businesses succeed (through a business's entire business lifecycle)
- To help hospitality build clarity, sustainability, and community.

- To help Idaho's manufacturers succeed.
- To help land stewards thrive using regenerative agriculture.
- To help small businesses grow.
- To help small-scale and niche meat supply chains grow and thrive.
- To help women in Montana start and grow businesses
- To inspire success, foster cooperation, and advance the economic vitality of agriculture in rural western Washington by providing expertise, resources, and business technical services to agricultural enterprises.
- To lead economic growth in order to build resilient communities and create opportunities for people to thrive
- To play a foundational role in strengthening the connections between local food, local communities, and regional economies by being the go-to resource for finding food that is grown, raised, harvested, and made in our state. (Washington)
- To promote the grass-fed livestock supply chain in the Southwest through producer and consumer education.
- To promote, educate and assist grassfed livestock producers in the southwest mainly but also nationwide
- To provide access to education, financing, and asset growth, in order to improve the prosperity and well-being of Native American families.
- To provide high quality, no-cost technical assistance to small-scale meat and poultry processors
- To provide the tools and guidance for small businesses succeed
- To provide tools and guidance for small businesses to success
- Training Veterans in sustainable agriculture, turning protectors into providers.
- Transform west coast watersheds so Pacific Salmon can thrive
- University of Idaho Extension improves people's lives by engaging the university and our communities through research-based education. Our areas of expertise are Agriculture, Community Development, Family and Consumer Sciences, Natural Resources and Youth Development
- University of Idaho Extension provides reliable, research-based education and information to help people, businesses and communities solve problems, develop skills and build a better future.
- We are changemakers who strengthen connections with and between farms, ranches, and communities so that all Coloradans have equitable access to fresh, nutritious foods.
- We assist farmers to adopt organic systems where soil health, social fairness, and animal welfare thrive by: Providing technical assistance, translating research results into practical information, connecting communities, creating educational resources. The needs and goals of the diverse communities we serve direct and motivate our work.
- We help institutions be in relationship with their food and farmers, and we do this by brokering sales from food hubs and small producers to schools, hospitals, universities, and other institutions.

- We help reduce barriers to participation in the market for farmers from refugee backgrounds.
- We inspire action to solve climate challenges by learning as a community to grow, eat, and live sustainably.
- We provide comprehensive research and education on wheat and end product applications to connect farmers to their ultimate markets and customers
- We strive to transform land management practices so pacific salmonids can thrive.
- We train and support beginning specialty crop producers
- We work in community with Washington farmers, gardeners and eaters for a more sustainable, healthy and equitable food future.

Do you have suggestions for how the Northwest and Rocky Mountain Regional Food Business Center can help ensure the historically underserved farm and food businesses in your service area have access to programs and services? (n=62)

- Better program visibility
- Collaboration and partnerships, information resources, championing and advocating for change of systems that cause or create limits
- Conferences that provide workshops, panels, trainings, and networking across Idaho
- Connect with economic development centers and SBA in our region.
- connect with emergency food service networks and farmers markets
- Contacting the above offices and seeing what programs they offer. Most are free.
- Develop partnerships via MOU with organizations representing these constituencies
- develop trust and relationships with the organizations that are specific to priority demographic groups
- Do what you are doing here - -spend a lot of time figuring out who are trusted, local partners. Do not listen to organizations themselves that say they are. Vet organizations to find out who is actually trusted and who has deep local relationships. Drive resources (\$\$!) to the organizations who are ALREADY doing this good work and help them do it even more. Pay local people to reach out and find new businesses to connect them to what you are doing. Don't survey people.
- Don't just focus on urban entrepreneurs. Don't just focus on CPG products. Include small, rural grocery stores.
- Electronic distribution of information to TA providers
- Engage partners who can communicate what the barriers are to participation.
- Engage with the local organization that is providing assistance to these farms and food businesses. Host workshops and classes. Offer grant programs that focus on rural areas and very small businesses.
- Ensure that the entire life-cycle/supply chain of food is considered. Bringing in marketplace forces and partners are essential.

- Ensure that their websites are translated into multiple languages, create events and grant opportunities in different languages. Make sure there are grants that serve BIPOC communities specifically.
- Fund community organizations led by historically underserved farm and food businesses to provide technical assistance to their communities. Provide TA first to those communities to assist in preparing strong applications for funding opportunities.
- Funding for pass-through grants and matched savings accounts and capacity for regional partners, like NE OR Econ Dev District to operate those programs and associates technical support. Funding to purchase targeted TA from other service providers to meet individual food biz needs, such as to purchase nutritional analysis, market research, or even services such as setting up financial record-keeping or getting taxes in order. Funding to support the capacity of important statewide partners, such as Oregon Community Food Systems Network - which is fostering collaboration and leveraging state funds.
- Funding to local organizations to do the on-the-ground work we are doing
- Help connect underserved farm and food businesses to our network
- Hire members of the communities you wish to serve
- I think that partnering with the local cities within those areas is a good start. Many cities have employees who know more of the community than anyone else. Speaking specifically about Parma, Melba, Huston, Marsing and other small rural cities.
- I would explore avenues to further provide outreach and technical assistance to tribal partners, and consider adding them on to RFBC committees, etc. Additionally, I feel like Kate at WSU will be a great resource on further guiding Washington's RBC on conducting bilingual outreach to Latino growers in the Columbia Basin.
- I would say further ensure targeted outreach and awareness is being done with diligence in these communities, both directly and through an org like IAC. I think developing/strengthening relationships with tribal farming entities would be very help to ensure their needs are being met. I know the WAVE Foundation is working with tribal producers on the market development side, while the intertribal Agriculture Council is also highly interested in this work both regionally and nationally.
- Identify all the organizations serving underserved businesses and document them by the communities they serve in one centralized place. Ideally, work with the Eat Local First Collaborative to build a directory of such providers so that businesses can more easily find all the resources they need in one location. In addition to business support services, this would ideally be resources they need to run their businesses, including infrastructure like distributors, processors, co-packers, commissary kitchens, equipment rental and purchasing, feed sources, etc.
- If you have any capacity building for organizations like ours that are on the ground. We have a lot of available programing but struggling to build enough capacity to have dedicated resources to specific disadvantaged groups.
- Include information in our and other newsletters, table at meetings - Especially at Regenerate at the National Western Center in Nov.
- Language-barrier support

- Licensing assistance, regulations clarity
- Local connections, classes/material in Spanish
- Make sure to bring a chair to the table for minority producers and groups.
- Making applications for resources/services streamlined and simple. Please share any opportunities with us that are relevant for us to share out in our network.
- Marketing. Funding
- Micro-grant/lending programs for start-up/scaling businesses
- More communication about tools and resources. People don't know what they don't know
- No - we serve all populations but do not specifically target the historically underserved
- Not at this time
- Not sure
- On the ground contacts, as locally focused as possible
- Outreach and work with partners to promote services.
- Outreach to service organizations in Idaho counties- (e.g., Community Resource Center of Teton Valley; local food banks and pantries, Chamber of Commerces)
- Partner with local schools, 4-H, and extension services.
- Partner with the people in the community already doing the work who live and are already connected to those underserved businesses
- Pay for translation services; fund TA providers who have explicit goals, histories, and track records of working with underserved producers; force business development TA funds to focus on supporting market access/business growth for BIPOC producers
- Provide assistance accessing USDA programs and funds - grant writing assistance, applying for conservation programs such as EQIP
- Providing a Commercial Commissary Kitchen: Support the biggest need by offering access to a commercial commissary kitchen. This facility will enable Black-owned food businesses as well as other small businesses to prepare food for events and services efficiently.
Enhancing Outreach and Education: Collaborate with IBCA to conduct targeted outreach and offer culturally relevant training programs. Facilitating Resource Access: Help these businesses secure funding and provide mentorship.
- Providing capital access to those small businesses needing financial support.
- Providing us resources to support them
- Recognize that those historically underserved is more than just the minority groups and that beginning farmer and rancher does not mean young (NASS states that the average age of the beginning farmer/ranchers is 47 years old).
- Resource mapping
- Streamline application processing.
- The biggest need is for a fund that can purchase from the farmer, and then it can be delivered to pantries. They often rely on donated foods and small farmers have trouble donating the small profits they make.
- There is no one on the ground here trying to connect to them. There is so much work do be done in rural central Montana.
- Trainings, funding, marketing of services.

- Traveling to where people are. Adaptability to different communications based on where folks are and what the need, e.g. Not everyone checks email. Being prepared to hear what on The ground needs are. Stipends or travel funds to participate.
- unsure
- Urban outreach. Using peer to peer learning environments. Creating opportunities for grant funds to be awarded specifically to small acreage farms.
- Visit and meet them. Build trust. In person goes a long way with farmers and ranchers in general.
- While we are making progress, we are hoping to expand into a wider wholesale market. Collaboration on this would be great.
- Working with and supporting the previously mentioned organizations, as well as engaging the State and Regional USDA NRCS infrastructure to access programming and the 9 steps of farm planning and programming. In addition, the Community Farm Ag Coalition is also recommended.
- Yes!
- Yes, low interest loans
- Yes, partner with us and local place-based organizations doing the work and help with resources and added capacity.

Would you like to describe or explain why you answered any of the questions [about underserved audiences] in this section the way you did? (n=36)

- Currently we don't have the bandwidth nor the resources or expertise to cover these areas.
- Given our organization does very little to support these particular efforts, I don't feel like I have much to contribute.
- I am an officer of our national organization Farmer Veteran Coalition National, I have navigated the beginner farmer journey over the last 11 years in Montana and know the challenges of this topic well. Our National team is well versed in facilitating the transition of Veterans & Service members as our niche market expertise.
- I am not sure what support for aggregation would look like or what support for storage would look like other than directing producers to potential partners in storage
- I don't know that we need to increase these services, and there are so many out there. Rather, what I think is more important is that these service providers be funded for their work in a consistent and reliable way and that we develop better navigation around these services for businesses looking for support. It feels vital for us to centralize information about these resources and then create a very simple, user-friendly way for people to know who is going to be the most successful for them and then send them there. I also don't think a list people have to wade through is at all helpful, but instead an actual human AND digital navigator option that intuitively guides people through their needs to identify who to go to. I really like Montana's Food and Ag Development Center model, and I think a questionnaire style online guide and directory would be complementary.

- I work on the community development side of extension and am not completely versed in ag-related programs we offer.
- Most of our focus is on livestock production and direct sales
- My county office doesn't do these, but the organization as a whole does it.
- Need more information on services and capacity
- our primary focus is on governance and management but some of these apply.
- Our team provides extensive training and TA to farms and aggregators hoping to sell to institutions, primarily schools. We do not provide much else direct support to businesses specifically. Another part of our team does support small retailers and farms and farmers markets in how to offer and promote more local produce and how to accept federal food benefit programs and promote them.
- Puget Sound Food Hub Cooperative is a middle-of-the-supply-chain solution for our local growers. Once a grower is able to produce products for a wholesale market, we market + distribute
- RVFSN focuses on resource allocation, information sharing, and building connections. We are a convener and a networker. We will also be publishing the RV Community Food Assessment and Action Plan in November which will identify key areas of need and action in our local food system.
- RVFSN is a networking and convening organization, we don't offer direct support or TA but are often the one's that people go-to to find out where they can go for specific types of support.
- Some things I marked No as we don't specifically help them with those pieces, but we do connect them with partners that do help them with those items.
- The Bootstrap helps with business support services, not the food or industry content...
- These are all part of our scope of work in our cooperative agreement with USDA Ams
- They have to have a mfg NAICS code in order for the MEP to help them. Unless a farmer is doing something value add, they don't necessarily have the mfg NAICS code.
- We answered "don't know" for all items on the top question because - we are currently developing a Beginner Farmer Training Program that include a Registered Apprenticeship that will launch in 2025. It will likely include many of these elements, since that's what beginning farmers need to know.
- We are just launching our farm technical assistance program so a lot is currently in development.
- we are primarily focused on export market development and research supporting that,
- We assist farmers or ranchers create co-operative businesses and offer connections to the above listed services.
- we manage a local, bricks and mortar store that sells products produced in kitchens and on farms in Fremont County, Wyoming
- We mostly make referral and guide to organizations/locations that will provide and those marked yes are some we've done but we'll help connect in whatever way an entrepreneur needs
- We primarily connect to existing resources outside of the state agency.

- We provide general TA. Sometimes we don't get into specifics of certifications for example because we don't have the capacity.
- We provide generalized support to beginning farmers, but we try to act as facilitators to bring people together. So, when we work with someone on distribution, we have connections to support that part of the business. We don't necessarily get into the weeds with folks (other than pulling them), but act as a conduit for producers
- We provide many if not all the services you asked in this question: How much of a priority do you think it should be for the Northwest and Rocky Mountain Regional Food Business Center to help increase the following types of support for farms and food businesses in your service area? There likely isn't a need for duplication however, we focus on the business side of education, training, resources vs. the intricacies of food operations. I hope that makes sense.
- We provide services to all types of businesses, not just food businesses, so our expertise is influenced by past experience with food businesses, including personal business ownership experience among our staff. We seek to understand the goals and needs of the business owners and provide referrals to qualified technical service providers to help them get targeted TA for specific topics that are not a fit for our qualifications or experience. We have an 'open door' approach and encourage people to always contact us and we can help them with wayfinding and connections.
- We provide significant resources for market development and connect producers with distributors and markets. Therefore, I put that as a lower priority for the center. Rather - some of the other areas are greater gaps
- We provide workshops, farm walks and farm podcasts that cover all aspects of operating a successful farm or food business
- We support all businesses on all levels, with all needs, across all of Idaho.
- We support diversified market access through our online resources. We indirectly support aggregation, distribution, and supply chain for the same reasons. Many agencies, school districts, food hubs and distributors rely on our resources to discover and connect with producers.
- We're a food hub, still in incorporation. Answers are based on what we know we're planning to include and some of us are already doing informally
- While Kitsap County has limited medium sized farms and food businesses a collaboration between local TA providers works to provide education, support for regulatory compliance, policy development, farmland preservation, and other help for local farmers and food businesses
- While our business does not physically aggregate, store, or distribute products, we extend our network of aggregators and distributors to small farm/food businesses so they can leverage those regional assets. In turn, we specialize in driving sales of those products through our networks to institutions and wholesale purchasers of local/regional food.

From your perspective, what are the most important next steps needed to increase coordination across producers, processors, distributors, and buyers of climate-resilient grains and pulses in your service area? (n=48)

- A million dollar question! I really enjoyed hearing about some of these producer/wholesaler meetups that were mentioned on the RFBC call this week in Portland. I think that is a big time need to continue to foster the conversation and get more coordination in place. I also do feel like there's a gap between the markets that much of the wheat grown in the Palouse goes into in Asia, such as Japan and China. If there was a way to further facilitate a dialogue with those buyers and get them interested in sourcing a value-added commodity (such as Salmon-Safe or Farmed Smart wheat), that would strike me as a way to get more climate resilient practices on the landscape. It would also open up other opportunities to sell products domestically to other high value markets, but would at least elevate growing practices ideally to a higher and more comprehensive level of stewardship. I think further facilitating conversations with farmers and retailer buyers is key. Any forum in which these people can get in a room with one another would be fantastic to foster a dialogue to ultimately get their crops on purchased.
- Add more hours to the day! Provide more support to increase the capacity of those already doing the work
- Aggregate storage and rail transload. Cleaning equipment.
- Aligning supply/production of products with the process of influencing large-scale (institutional) demand for these products; large buyers need to understand and drive demand for these products before we (as brokers) feel confident telling farmers they should scale production
- Assessing the interest and current efforts to engage in this type of production in our region.
- Capital and communication
- Climate resilient grains and pulses is very narrow....
- Community support. Too often are one off farms and ranches doing great work, with no local resources or community connection. If multiple producers could work together as we navigate these systems, I believe the producers would be much more likely to continue the work.
- Connecting the dots between growing and marketplace.
- Consumer awareness and brand education. Consolidation of labeling to accurately document stewardship results on the land.
- Coordination amongst service providers so that the groups can move forward with being derailed by "experts" who are there to help.
- Create coalitions in the different spaces for bridging the gaps. A market research survey
- Develop shipping and distribution of regional organic and regenerative grains separate from commodity market
- Don't know
- Face to face meetings

- I am more familiar with the successes and challenges of the local food hubs and markets distributing fresh produce. After 10 years we have 2 moderately stable, hyper-local hubs making a real difference in the area. I'm not familiar with the grain distribution process to comment on this.
- I don't have much insight into grains and pulses.
- I don't know much about this one -- I assume the answer to the question about infrastructure above is actually ""high need"" for all of those items.
- I expect your organization is much more advanced than what we are doing in central Wyoming. We offer a local outlet for locally produced foods and we operate under the Wyoming Food Freedom Act.
- I think that equipment and processing for small farms is the biggest barrier to most diversified producers in Colorado.
- Identify hubs and go from there to work with the spokes of the model.
- Identifying buyers. Putting together aggregated product. Finding suitable co-packers. Product R & D. Packaging, labeling, distribution.
- improve consistency and availability of resources!
- In Southern Oregon, the Heritage Grains Project is well underway and has good momentum. There is continued support needed to grow the infrastructure, HR support, and branding of local grains.
- Infrastructure assessment
- Kitsap has no grain producers. Pulse production limited to very small scale.
- Market development
- Marketing and Education not duplication
- Networking to connect producers through farm organizations
- not a focus area
- Offer support in value-added marketing around grains (environmental, nutritional, etc.), support distribution and processing infrastructure, support in navigating regulations (e.g. how does a local bakery get their bread into a larger grocery store, how does a farm or a mill become certified organic and what financial and technical resources are there to support? + support with grant writing (there are many opportunities available for small businesses, but often limited capacity on the businesses end, so human resources to support small farms/businesses in accessing the resources would be helpful)
- Processing facilities and distribution
- Provide funding for local food infrastructure grants, improve distribution of local food across the state and region, marketing to build consumer demand
- provide opportunities for producers etc., come together for learning and networking
- Really just knowledge. This is cattle/hay country, so large scale, cultivated crops are a rarity aside from occasional feed corn or barley. Next steps would have to include incentivizing people to make a big change.
- Related to the previous question/prompts; it's difficult to determine level of "need" without data to support my answers so I answered "don't know" on all of the questions. I know there's always opportunity to improve processes, but the level of "need" is difficult to

determine. Having said that, I would hope that by researching the industry challenges/needs by directly surveying businesses within the arena of producers/processor/distributor of grains would yield valuable information regarding their needs.

- Support processing infrastructure and distribution needs.
- Supporting the study Montana Cooperative Development Center (MDCD) is leading and Montana Manufacturing Extension Center (MMEC) would do, to see what already exists and identify where the best use of our cumulative resources would be.
- The producers need help letting buyers know they exist.
- There is a strong need for Ag professionals who are culturally competent and have new generation farming experience.
- This would be a question for businesses
- Understanding of markets for different regions of the state
- Ways to connect outside of busy season like a conference of sorts
- We do not have a lot of growers in this area, so the ability to grow more. Labor is a big issue
- We need to get producer buy-in and agronomic support for regenerative agriculture practice implementation before we start trying to sell regenerative grain. From there we need off-takers to commit to buying regen products so we can start building the necessary mid-scale processing.
- We need to have open and transparent conversations about how relationships can be regenerative in nature. The true practice of regeneration is also socio-economic in nature.
- Work with the heritage grains project to continue to increase acreage of seed planted, as well as develop the marketing and demand for locally grown heritage grains.
- Workshops, outreach, materials in different languages (Spanish for our organization)

From your perspective, what are 1-3 technical assistance priorities the Northwest and Rocky Mountain Regional Food Business Center should invest in to strengthen business viability and overcome barriers to market access and expansion for climate-resilient grains and pulses in your service area? (n=36)

- A study on distribution across central and eastern Montana
- Accounting
- Agronomy
- Assessment and mapping of interested farmers or farmers already producing these crops
- Build strategy with SBDC state and local
- Business Plan Development
- Business Plan Development
- Cayhill Seeds of Scobey Montana
- Communications and Marketing for "regenerative" grown foods
- Compliance/licensing
- Cooperative marketing (e.g., social media marketing)

- Distribution
- Distribution concerns, connections, and requirements
- Education
- Education
- Grant writing - help small farms/businesses identify and apply for existing resources available
- Greenhouse/shade structure funding
- Helping them find funding sources
- Idea viability/monetization
- Increase support for those already providing technical support financially, whether in grant writing or providing those funds.
- Invest in smaller scale malt houses and milling facilities (Mainstem, Ethos Bakery, etc)
- list of viable/feasible funding sources
- Mad Ag
- market research
- Marketing
- Marketing & promotion
- Marketing campaigns
- Patient capital
- Production training and support
- see #1 above
- Shipping and distribution support
- Storage
- Support a directory of existing businesses to increase visibility to consumers and wholesale buyers
- Technology Training Initiatives for Producers (e.g. Eat Drink Washington County)
- Value chain coordination
- Develop marketplace and increase buying community (demand side forces)
- Education-based convenings to share best practices between growers
- Expand business builder grant funding pool significantly (not quite the answer to your question, but seems like the pool needs to be way bigger)Invest in further exploration of supply chain developments/processing for things such as kernza, Triticale, naked barley, and other climate-friendly grains
- Full value chain technical support and navigation
- Help those providing this support in developing commercial kitchens, storage, packaging, and those elements that have been out of reach in order to make this an accessible goal
- Help with discovery of climate resistant grains and benefit of producing them
- increase in educational resource materials
- Irrigation funding
- Market access
- Market Feasibility Study

- Market viability
- Marketing to specific clients
- National Center for Appropriate Technology
- Networking & Collaboration
- new product development
- Outreach to those farmers
- Paying for direct sales support to build demand for products in large institutional markets
- Present AASBDC annual conference
- Processing infrastructure
- Product Development & Commercial Spaces - (e.g. a mill that wants to explore product development needs a commercial kitchen space to actualize)
- Snaplands
- Startups Facilitating Local Supply Chain Development (e.g. Foodi Menus)
- Storage
- Training for institutions (culinary) on how to integrate these items
- USDA Risk Management Insurance
- Whatever the results of that study say we actually need to get it done
- Brand development
- branding/identity
- Co Packing Plants
- Connect organizations such as ours to systems that are working and those already there in order to increase understanding that can be passed down to those needing it. Train the trainer and mentor the mentor scenarios
- co-packer research
- Creating a space for the voices of the businesses to be a part of the change
- Education & Marketing - how can we collaborate to get messaging out about benefits and value-add of locally sourced grains?
- Farmer Veteran Coalition National
- Help market/sell
- how to Identity preserve these products at scale
- improve market connections
- Incentivize food hubs to drive aggregation and sales of these products
- Information sharing about market opportunities and incentives
- Initiatives Connecting Buyers and Producers through Digital Means
- Invest in budget to better educate the public on these new grains/products to enhance market awareness and demand (i.e. Kernza)
- Make the process easy for clients, government complicated
- Remove barriers and deploy infrastructure
- The Land Institute
- Workshops/farm tours in Spanish

From your perspective, what are the 1-3 most important technical assistance priorities the Northwest and Rocky Mountain Regional Food Business Center should invest in to support meat businesses and supply chains in your service area? (n=48)

- Accessing Markets
- American Indian Foods
- Budgeting/cost of starting up and operating
- Butcher training
- Byproduct utilization
- certified organic slaughterhouse access
- Climate Smart Initiatives
- Cold storage development
- Commercial kitchen on east side of Montana. Huge need!!
- Commercial kitchens in eastern Montana
- Community based, owned, and governed processing facilities
- Creating a space for collaboration and for the voices of these business owners to connect, learn and grow.
- Developing small scale USDA processing facilities
- Distribution
- Don't know!
- feasibility studies & business planning
- funding and fund development
- Grant identification and assistance to new or existing meat processors who want to become USDA-certified
- Help to apply and receive grants
- How to turn animal biproducts and waste into businesses
- improve education regarding regulation standards
- Increased marketing for institutional buyers to switch to local proteins
- Leadership recruitment/cultivation/onboarding
- Local processing
- marketing
- n/a
- Not a confusing website with a person ready to assist without being on hold
- not being a meat producer myself, I am unsure of what is needed. I do know our Locak Market supports multiple beef, pork, lamb, chicken producers in selling their products
- not sure
- Policy
- Processing
- Processing Facilities: Help establish relationships with local meat processing centers.
- Processing infrastructure
- processing services / facilities
- Production and marketing planning

- Regenerative Grazing techniques
- Regulatory compliance
- Retail Packaging
- Same list as for pulses/grains.
- Small Processing accessibility
- There is technical assistance available- it is the funding for infrastructure development that is lacking
- Understanding access to market premiums
- Understanding regulations
- Unwilling meat cutters for more value added production
- USDA certified chicken processing for small producers
- USDA processing facilities in rural areas (i.e., Eastern Idaho)
- Varies a lot depending on if you are focused on underserved business owners or not
- Workforce needs
- Distribution: Make it easier for small business to get meat products from distributors
- Business Plan Development
- Caring for the land using an agricultural business model that works with what the land and natural resources can provide
- Different certification levels (custom, state, usda, etc.)
- distribution
- Distribution of local meat
- Ease of USDA regulations or assistance in obtaining.
- Education explaining technical assistance available, use Community Colleges like FVCC
- feed screenings coordination: credits and/or sales
- feedlots/finishing opportunities
- Help navigate both local and federal regulations.
- Help with legal and regulations for producers
- identify niche markets for product marketing
- Increased business planning support for small ranchers/meat businesses (esp. BIPOC-owned) to increase price competitiveness and access new markets
- Labeling
- Launching small scale processing operations
- market development
- market research
- market research
- marketing of climate resiliency
- n/a
- platform for small farms looking to partner with small-scale poultry production
- Processing and distribution logistics
- Prospera, Bozeman

- Provide visibility to projects looking to become USDA-certified and connect them for collaboration
- Shipping
- Support for long term, subsidized USDA/same-as regional meat processing, with assessment of processing quality. Who is doing the best job? What are their pinch points? Who is benefitting from their services?
- Supporting producers in navigating market potential (e.g. What will customers buy regularly
- train the trainer workshops information
- Transportation Networking
- Transportation of product
- USDA inspectors
- Workforce development
- Workforce Development
- aggregation models
- Aggregation of products for marketing
- Aggregation of small producers to meet market demand
- Assist those projects with whatever they need to wade through the regulatory process
- Beginner and First Generation Farmer Development
- clear direct line of support
- cold storage
- distribution and marketing of final product beyond what the Meat Depot/local efforts - a joint meat marketing system would be great (a cooperative perhaps!).
- Equipment funding/Lean manufacturing techniques
- Institutional procurement navigation both for purchasers and suppliers in NM we have a great approved supplier program for schools and senior centers but an issue is the cost of fat content testing and labeling that meets the needs of nutritional standards institutions require, as an example
- Invest where education exist not recreate it
- Lots of disruption in land access/tenure due to current subsidy/insurance environments which favor high-capital/net worth partners being used to acquire land and generate income from non-productive sources. Also disrupts social capital of rural communities and increases income inequality and negatively impacts mental health and exacerbates the impacts of climate change.
- Market pricing tools or resources
- Marketing
- MDA FADCs
- n/a
- Production and pricing
- Regulation Training: Offer training on food safety and rules.
- Rendering

- Support sales outlets like Kitchen Sync and others to proactively sell local meat into public K-12 school markets
- Transportation
- Wholesale distribution networks to utilize whole carcass
- wholesale readiness

What training or other technical assistance do the farm and food businesses in your service area most need to improve their ability to secure grants or loans? Please list 1-3 priorities: (n=47)

- Ability to find and write successful grant applications
- Applying for grant support/education
- Applying for grants/grant writing
- Basic bookkeeping / recordkeeping support
- Bookkeeping records
- Business Planning
- Business Plans
- Business plans
- Capacity - they are looking to us to do more or another EDO and capacity is just an issue
- Capital budget
- Capital stacks
- Collateral is the biggest barrier to access to capital - not sure TA can solve that
- Direct TA to support historically underserved farmers develop strong proposals.
- Farm Stress and Resiliency Training / Support
- Financial forecasting
- Financial Planning
- Financial projections and budgeting
- Getting credit worthy
- Grant seeking
- Grant writer
- Grant writing
- Grant writing
- Grant writing courses
- Grant writing training
- Grant writing, marketing, production expansion, market research
- Grant Writing: Training in crafting effective grant proposals.
- Having a strong business plan and financial projections to show lenders they have a plan to pay back the loan if there is a bad year
- Help with application
- How to draft a budget
- Human resources - grant writing & identifying suitable opportunities & partners
- Identifying and centralizing information about available funding

- In-person outreach about opportunities
- loans and funding for mutually owned businesses, like Co-ops
- More clarity about the types of programs available
- Multiyear business planning to get ahead of grant/loan cycles
- Navigating price and market fluctuations (domestic and international)
- Navigating the grant application process
- one on one assistance
- Options
- Profitability seems to be a huge hurdle. Helping producers and processors understand how to price products, cuts, value added, etc.
- Providing Grant writers, or help in writing grants
- Revenue and cash flow projections versus overhead
- Security of purchase orders = "Marketplace" Support
- Simplify process
- Understanding the commitments of grant funding
- Understanding their financials and budget
- Understanding what is available
- A center that will actually review the applications and help producers complete applications
- Ability to develop a realistic budget and funding outlook
- Assist in removing corporate barriers
- Bookkeeping services
- Building solid pro-formas (sales projections)
- Business Data entry and collection
- Business Planning
- Develop relationships with orgs that support historically underserved farmers and food businesses to spread awareness of grant opportunities
- Education and examples that win grants
- Ensure communications documents/marketing information is presented in manner that is required by funders
- Financial form literacy
- Financial Management: Support in budgeting and financial planning.
- Financial planning
- Financial Readiness
- grant writing
- Grant writing or funding for grant writers
- Grant writing skills
- Help writing grants and applications for other funding resources (farmers are busy and that may not be their highest skillset)
- How to calculate how much they really need for financing
- How to write and submit a quality proposal

- Land Acquisition
- Less Complicated grants and loans
- Loan application support
- Loan preparedness
- Marketing
- Navigating the federal grant application and administration process
- Patient repayment
- Preparing financial statements
- Pricing and marketing assistance
- Projected Cash Flows
- Right sizing projects for funders
- Spanish language resources
- Strategic Planning
- Technical support in actually writing applications
- Understanding limitations
- Understanding the ecosystem of funding options
- Understanding what is available and what would work - comparison chart of some sort of different resources
- Unsecured loans of \$25,000 or less have been identified as a priority in our region.
- Better understanding of the grants available and what they can be used for
- building appropriate capital stacks for the project at hand
- Costs to breakeven or make a profit
- Develop co-ops and/or vertical integration and partners.
- Educating lenders!!!!!!
- Execution of Funds
- Financial literacy
- Free or low-cost assistance with preparing competitive federal grant applications, developing alternative forms of capital for under-resourced businesses.
- Funding Navigation: Guidance on finding and applying for relevant funding opportunities.
- Identifying grants for producers
- investor pitch training
- Marketing / PR
- One to One writing and TA support
- Realistic discussions on building a company on grants vs. viable financial resources and accountability. To many times we here "we will just a get a grant" - grants are not the answer they are the extra.
- Realistic idea at start if a grant is even possible
- Sales Plan
- Software support
- Succession planning preparedness
- True-cost accounting on-farm

- Understanding paperwork and reporting burdens
- Using financial statements to make business decisions
- Water Rights

How can funders and lenders make their programs more accessible for small and mid-scale farm and food businesses? (n=41)

- \$10,000 can be impactful for a small producer. Recent grants (WSDA Infrastructure) have focused on regional food system impacts. That requirement to collaborate or have a regional impact means small producers wanting to invest in their operations (putting in a wash/pack facility, purchasing equipment, upgrading existing infrastructure, adding cold storage) are essentially ineligible for funding because it only benefits one farm or operation. Small grants, individual farm investments, unsexy stuff like generators, freezers, and tractors can make a HUGE impact for a farm
- A special pot of funds, more understanding of the disruptive new businesses and markets
- advertise
- Applications that are less complicated. Coordinate with local technical assistance providers to help them.
- Attend the different agricultural association meetings with information available - support the Federal Streamlining Act so that federal funding isn't so complex to obtain and administer.
- Be innovative.
- Be present; improve access to information / resources through technology (web, cell, etc)
- Being more accessible, transparent and reducing paperwork and reporting burdens
- Build relationships with SBDC, make it easy. Get out of office, Covid caused zoom to boom, people need people. Tech is fine soft touch more important.
- Connect them with CPAs to assist with submitting financial docs
- Create low interest, non-extractive, patient loans
- Direct outreach, targeted tailored recruitment
- Do better research!! Get better data that shows that these are not necessarily risky investments!! Do better forecasting.
- Education and Training
- Face to face
- Financial literacy/technical support / market assessment and reporting/ flexibility with time and ROI
- Getting the information out to the right individuals, partnering with local centers to get connected, trainings.
- Have a more comprehensive and assertive social media and online strategy.
- Have capacity for one-to-one services,
- Help modernize the farm bill. What barriers have already been identified, for example by NYF Coalition or through the USDA Equity Commission? Pay attention to those. Collateral is

a primary barrier (people who have access to wealth are those who can most take advantage of supports and incentives even though they need them the least). Address the way rules are sometimes interpreted by individual loan officers/service providers based on their biases. Provide one-on-one counseling by people who are not condescending and have culturally specific experience (including low/mod income and rural frontier). Prioritize under-resourced business owners and those with demonstrable 'giving back' to their communities.

- I don't work closely with producers and helping them apply and secure grant loans. The examples in which my organization supports this is sharing grant opportunities with farmers in their region through their local conservation district generally (such as Sustainable Farms & Fields), CIG grants, or others. We sometimes will often write a letter of support on these grants, but it's generally rare that we have a very close relationship on grant application with farmers specifically. Much more so with tribal entities. In that regard I don't feel like I have expert insight to share regarding the need to improve the ability to secure grants or loans, outside of just greater outreach needed to ensure farmers of all backgrounds can access which grants are available to them.
- Less paperwork and application requirements. Lower the barrier to entry for folks who aren't literate in the paperwork side of things
- Less paperwork.
- Make it a priority to meet targeted climate and equity goals.
- make them accessible to all and prioritize the under served
- Making them easier to apply for
- Market the SBA and USDC programs more widely across the state to local lenders
- "More simple applications, availability in multiple languages, TA for applications, availability to people with low credit and assets. For grants: non-reimbursement based, budget flexibility, multi-year funding, no matching requirement, simple application, inclusion of administrative costs, scoring clarity, responsive feedback with declines, flexible activities, flexible reporting, reduced reporting, competitive for smaller orgs, guidelines clarity"
- not sure
- Offer information in Spanish
- offer support programs to both educate and work through the requirements
- Provide TA support in the application process, with language accessibility options.
- Reduce previous experience requirements related to future plans for beginning producers. Improve understanding of and customer service for non-profit and other community benefit focused food/farm businesses. Improve customer service experience for historically marginalized producers.
- Shorter applications; technical assistance with applying for the funding
- Simplified loan application process, and collaborating among lenders to help business build a financial stack.
- Simplify application process?

- "Simplify Applications: Streamline paperwork and reduce complexity. Offer Flexible Terms: Provide adaptable loan and funding options. Provide Support: Offer financial management and business planning assistance. Increase Outreach: Educate and engage with businesses about available programs. Partner Locally: Work with community groups to better understand and address business needs.
- Smaller grants, smaller loans, simpler applications, more stuff online, one-on-one coaching through the application process, easier reporting
- Subsidies redirected from the farm bill
- Support creation of a "central hub" listing relevant resources that are easily accessible to producers
- Understanding that the risk is different but it doesn't mean it's bad.

What would your organization most hope to gain from partnership with the Northwest and Rocky Mountain Regional Food Business Center? (n=61)

- A community commissary kitchen for producers to rent at a reasonable price
- A community commissary kitchen with a team to assist in product development, farm/ranch specific assistance and a USDA/FDA regulation assistance.
- A greater understanding of the resources available to serve the business community. Development of infrastructure and connections that will strengthen our community through food business. Financial capacity assistance in order to continue and expand the boots on the groundwork needed
- A stronger regional network
- Access to more farmers and ranchers so we can support them with our framework, experience and network of regenerative producers.
- additional resources for our livestock producers especially in finance
- already a part of it!
- Already a partner
- An opportunity to leverage our core competencies to greater deliver on our mission to advance the agricultural economy in Western WA.
- At this point I am not really sure what you do, so let's start there. We are always collaborating with local and regional partners - we all need to work together to improve the food system and support small farms.
- Better understanding of what is being learned, what resources are being developed, and when resources are available that we can promote to businesses in our region, especially grants and specific types of technical assistance. Hope that a partnership would help drive meaningful and increasing food systems change, toward more equitable and healthy food system that benefits everyone, and that our investments and priorities don't just continue to exacerbate the highly evolved and growing wealth gap, and that we build social capital and connecting/listening practices that can foster resiliency and counteract fragmentation at the basic community level - which is the nucleus of disaster response and community health.

- building larger capacity to support our mission in the region
- CGC would love to find ways to cross-promote technical assistance resources to our grain stakeholders, collaborate on events and network/education opportunities, and see how marketing initiatives can align (e.g. Colorado Grown Grains Co-Brand).
- Collaborating to accomplish the goals and objectives of building a secure, sustainable, healthy, and equitable regional food system.
- Collaboration among meat/poultry processors and other food businesses in the region
- Collaboration and partnership. We are very interested, at the same time, realize we all have a heavy work load and it may take time.
- Collaboration, connection, networking, unity, resources, support, technical assistance for businesses, more education and training for the partners to better understand the businesses and their needs in which the organizations serve.
- Developing internal capacity or strengthening external connections with support organizations for all of the topics within this survey.
- Education and support
- Enhanced Resources: Access to financial and technical resources to support and grow our programs and services.
- Establishment of needed Ag business support.
- Expanded resource network
- expanded services
- Financial backing and industry connections.
- First discover value, services and understand what success looks like. Partner a BIG word, send what it means to RMRFSC in order to understand.
- Funding and collaboration to support and expand our existing resources
- Funding for staff support (our demand exceeds our current staffing availability)
- Greater coordination of infrastructure and technical assistance throughout the region. Learning what's working and what isn't throughout the region.
- Growth
- Help with local food economies.
- Helping our ag women business owners in even more / better ways
- Helping to share your resources with our members and network
- How to better support are farm and food businesses in creating businesses focused on community need and cooperative development.
- I don't feel like I know enough to answer that question.
- I would need to learn more about the goals of the center and what resources they have available
- If there is any capacity building opportunities that would be great. However, we are always open to understanding different resources and what we can bring to the table in a partnership. Our office is dedicated to the Montana Cooperative Community and we try to stay in that lane- however, we often find ourselves in the role of connector. Having additional resources for our projects is always welcomed.

- Increased awareness of opportunities for support, both financially and in our work to more deeply embed our program in the fabric of our community.
- Increased capacity in serving ag businesses
- Knowledge and insight; connection to suppliers for our small market; insight into grant opportunities;
- Long term fiscal and financial health and planning as we grow. With our business already in full operation, it's hard to back up and start from the business planning level but that is truly what we need.
- Market and Resource Development
- More resilience in our food and ag systems in the area supporting rural communities
- Networking support and funding to facilitate the transition of Veterans and Service Members in to Farming, Ranching, and Ag Careers.
- Networking support, assistance in communicating our work and desire to collaborate with food businesses, collaboration on development of processing infrastructure opening opportunities with buyers who need the mid-step
- Open to any opportunities available that could help support veterans in agriculture.
- Our organization would hope to continue the work on local supply chain, and helping the commodity farmers in our area.
- provide capacity building support for partners and communities
- Research, outreach, marketing, promotion support for our farm to institution work
- Resources and networking opportunities
- Serve more people
- So many rich opportunities - mainly to learn from colleagues on other supply chain coordination efforts on climate smart crops, and where we can best fit in as an environmental nonprofit 3rd party certifier of environmental practices.
- Support and training for our 100+ producers
- Understanding of our role related to the business center's role in providing business technical assistance to beginning farm producers.
- We are already a partner and look forward to continuing to develop support through the Center!
- We are already a partner.
- We are federal procurement, so we would love to help businesses looking to secure government contracts.
- We are the hub for food systems work in Southern Oregon and can continue to support NWRMFBC in implementing outreach and programming
- We have production and value-chain technical assistance dialed in for our producers, but we lack business and financial planning services for farmers in the area.
- "We understand the opportunity of this RFBC is once-in-a-lifetime. After 5 years of trudging through the work of expanding market access for food hubs and hundreds of small producers in 4 of these 6 states, we are keenly aware of the actual cost of this work (financially, personally, and energetically), and our brokerage & consulting model has allowed us to pull over \$2.5 million from the institutional market channel to local food

hubs, with over 65% of that being direct-to-producer payments. This shows me that- in the many states where we have built, refined, and expanded this model- this RFBC region needs to invest seriously in sales and the hard, slow work of market matchmaking. We hope to be able to share the lessons we have learned applying Value Chain Coordination theory into practice throughout this region, to share our best practices with many farm/food businesses in the region, and to inform public partners like Departments of Ag, Ed, and Health/Human Services in these states (many of whom are current/past clients) about how they can continue the investment that this RFBC will have started. We know this is a massive opportunity: we also know it is nowhere near enough investment across such a massive geography. We want to 'jailbreak' all we've learned so the successes we've had can multiply."

- We would hope to gain more support/aid for BIPOC farmers in Oregon.
- We're already somewhat partnered through my colleague, Melissa Hemken. But really we'd like to gain visibility for what WY has to offer for food businesses. Technical assistance would be great too- business development and planning, pricing, really anything that can help scale some of our home producers.

Farm and food business survey

Please briefly list the primary processed or value-added food products your business makes:
(n=24)

- All kinds
- Animal feed
- Black Garlic Products
- Cleaned and bagged grains, pulse and oilseed crops; flour
- flour with one of our specialty grains and frozen meat for individual sale.
- Flours, rolled oats, and whole grain berries for the homeowner to process themselves
- Freezer Beef USDA
- hard apple cider
- Hard Cider, Mead, Hummus, Pesto, Carrot Habanero Hot Sauce, Walnut Butter, Energy Bars
- legumes & grains
- Lightly processed fruit and vegetable for wholesale markets. Starting with retail packaging
- Malted grain for brewers and distillers currently; for millers, bakers, and confectionery in the future.
- Packaged blueberries, wine
- pasta, pizza, oil, vinegar, seasoning
- Portuguese custard tarts
- Rolled oats, flour
- snack food from pulse crops and grain
- Stone milled organic flour and baked goods

- Tempeh, tempeh hummus, tempeh salads. Tempeh is a bean-based protein. We currently use black-eyed peas and yellow split peas but are transitioning to pardina lentils, millet and hopefully more WA grown pulses.
- Tortillas
- We make a healthy, tasty Kamut wheat snack
- We sell value added cuts of meat. We are currently adding meat boxes with recipes.
- Whole & 1/2 live butcher lambs directly to the consumer
- Whole grain flour

Is there anything else you would like to say related to how the Northwest & Rocky Mountain Regional Food Business Center can best support small-scale, mid-scale, and historically underserved farm and food businesses? (n=18)

- Appreciate continuing education and notices when loans, grants, educational seminars are available. Recording available for trainings because they are not always held when we can attend.
- Better connections to restaurants, university food programs and retirement communities
- Bring a booth to the MT Soil Health Symposium in February!! :)
- Connect with philanthropic foundations that will provide a farmer assurance fund to cover the gap that farms with high levels of diversity and conservation have because they don't have the same coverage as chemical based, commodity, mono crop operations
- Contacts for helping walk through application processes or a mentorship option for successful grant/loan applicants to those new to the grant/loan process. thank you!
- Focus efforts on current farmers, stop focusing efforts on "who should be farming".
- get more operational in actually reaching and "serve: historically underserved. you need to embrace equity more tangibly instead of being the (almost) all-white gatekeepers
- Grants, education access, expert consultation, on site agronomy help, talking talking about climate wise grains such as millet and how important it is.
- Help develop networks for distribution. Packaging and labeling support would also be very helpful for businesses that make value added products.
- Honestly I feel like we need a community platform to help coordinate this diverse and geographically separated community of innovators. I have become obsessed with this concept. One of the things that really solidified it was the fact that earlier this year I met a grad student at OSU who is studying grain sorghum. He thought he was the only person to experiment with grain sorghum in the NW. When I told him that I have been innovating with sorghum based foods for a decade and that we have grown it throughout the region, he was really miffed that he did not know that. This lack of awareness of each other is a major barrier to moving forward. We must create a digitally collaborative place where we can find each other and create groups so that we are not wasting precious time and resources because we are accidentally reinventing the wheel. The sad thing is that I gave that grad student my contact info and he never reached out! To think that I could connect him with several farmers and seed breeders who have been working on his topic of research pains

me! Sorghum is a critical, climate resiliency crop so we can't afford to do poor quality research nor can we afford to reinvent the wheel!

- I feel sometimes that I am undergoing an impossible task to compete with giants, or it is unreasonable for a very small operation to efficiently process grain for human consumption. It would be helpful to learn about other small and niche-market operations rather than trying to replicate the operations of international wheat, soy, corn companies.
- I would love to visit with them about grants
- I would really like to find more grants to help with food access and healthy food preparation in my community. We have some amazing programs but I want to help make access to local food more accessible for my community located in a food desert. One specific idea I am working on is creating a on-farm retail/community space. This would help my own business immensely but also give my small community of less than 200 people access to a small store selling healthy and regionally raised meat, eggs and veggies as well as other farm products. Classes could be held in the space to offer on-farm educational opportunities and promote these regional and local products.
- Land access is always a challenge (but not for us) we lack infrastructure and equipment
- Let decision makers know that smaller farms are being driven into the ground by the consolidation in processors, buyers, suppliers, transportation and retailers. Some are outright monopolies, many are near monopolies. All have the goal of driving prices they pay down and prices they charge the farmers up. Farmers trying to sell locally can get higher prices to a smaller market, but still compete against those commodity markets.
- Look at MPPC meat-processing co-op in Havre MT. We need similar processing businesses for grains, pulse and oilseed crops; and for direct marketing value-added crop and livestock products
- Please help share, support and develop the resources more equitably throughout the state of Idaho. NOT just in Boise and Moscow region.
- stop focusing on the small scale, mid-scale and historically underserved farms

Do you have any feedback for grant makers or lenders related to how they could make their programs more accessible or equitable for businesses like yours? If so, please comment here: (n=26)

- As a university farm with NO financial support from the university it is VERY hard to apply for funding. The student-driven farm is exempt from most USDA funding in EQUIP and also is not a non-profit, so exempt from that funding. Located at a Tier 1 research university it is difficult to carve out our niche, however student and community interest in urban farming is reaching all-time highs.
- For an agricultural operation growing from single operator to multiple employees, or for a processor developing its first human consumption product, the record keeping and oversight required for government grants can feel like too much to take on in the early stages.
- Grant writing is incredibly time consuming and frustrating for farmers who are busy not being at their computers. We need more funding for rural grant writing support people.

- Grants for fixed equipment
- How do I find out what grants are available to me
- I am embarrassed to say this, but I realize that grants and loans are so outside my comfort level that I become kind of paralyzed when attempting them. A physical human support or mentorship option if not an employed person would be incredibly helpful. I think if I had that support once or twice, I could get the swing of it and be not just good on my own, but could also help others in return. Thank you for your work!
- I have been organic for 14 years. When I go to organic conventions, meetings, The two most important things that always come up are. Where is the market? and weed control (mostly being Canada Thistle). You people give grants for mechanical devices or developing new markets (which are many already), people just need to know who's who in the zoo! I have said for years that you need to offer scholarships for people to go to Bozeman (or other) colleges to learn about weed control. And don't do it via the internet!! The labs associated with these classes are as important as the classroom time. Give a grant to cover an apartment rental for a semester. No age restriction. Then have the grant receiver be required to come back to the community and share what they have learned. We need to learn to help our own industry. Colleges do research where the money is. not necessarily where the need is.
- I have not found it very easy to find grants that apply to individual producers.
- I'm trying to get land and get started. I'm on step zero not even step one. I need help to get off the ground.
- It is incredibly challenging to build a cohesive mix of equity, grants, and loans that is altogether needed to build food systems infrastructure. In general, I think it would go a long way for promising food systems entrepreneurs/founders to have access to COO/CFO-level business incubation assistance that is focused squarely on getting food systems projects funded.
- It took quite a while and was a long process but we were able to get a SBA loan. However, it was more short term, making the payments rather high for a brand new business. What is hard is getting rotating loans or lines of credit to help with cash flow while you are still getting your feet on the ground and building up your market.
- It would be nice to have all grants in some sort of database. That way deadlines and opportunities could all be found in one place
- just make grants easier and quicker to get in general.
- Make grant applications available during a slow part of the season. So many have a deadline during the busiest farming months and are near impossible to find time to apply to .
- Most grants are for producers. We are a food hub that needs help to grow and be more efficient.
- Please prioritize access for marginalized folks and also under-resourced regions (rural!!!). Idaho in particular has very few resources for the eastern side of the state and places like Moscow and Boise continue to reap the benefits of most ISDA AND USDA funding.

- Provide a centralized place to look for funding. It seems every new person we talk to gives a new website and says, "oh yeah, here's where grants like that get posted."
- Provide funding for entrepreneur-directed TA, funds for the advocate, navigator and grant writer, wrap-around services, team building, advising, and strategic fund development.
- SIMPLIFY! Grant application, reporting and documentation requirements are very onerous and time-consuming. It seems based on the assumption of fraud and requires us to prove otherwise.
- Simplifying paperwork, writing paperwork in simple language, sensible grant deadlines that take into account seasonality (for example, have application deadlines during the off season of the targeted producer, or award a grant for spreading compost before fall rains set in and field work becomes impossible)
- Technical assistance for moving to no till with cover crops. Also how to do with organic certified acres. I have figured out finding mechanisms probably better than most. My need focuses around technical assistance for regenerative ag.
- The GTA application process is getting better--easier to input and auto-save the information.
- Timing of when money is available to start project
- Understand that each farm business is unique and doesn't easily fall into standard categories. Also, farmers already have a full time job and aren't usually experts in finance, marketing, and business. Most are struggling to find a way to keep farming. Thank you.
- We are a woman owned business....no mention in questions for that or minority owned. Also how about help for farms/businesses that want to become certified organic. For first time outside help is almost essential
- Would like funding to create a commissary commercial kitchen in La Jara, CO.

Please briefly describe the primary barriers or challenges you experience that impact your ability to grow, process, or sell climate-resilient grains and pulses: (n=35)

- Access to crop insurance for intercropping.
- Access to mission-aligned capital, with the savvy and patience required to bring complex infrastructure projects and operational partnerships through to fruition.
- acreage and labor, portable mills, threshers and winnowers
- Brittle environment and lack of rainfall.
- cleaning, processing, storage
- Cost prohibitive.
- County restrictions on building.
- Customers want it, but getting the people in between the growers/processors and the consumer to understand what that means and the market premium.
- Everyone else is green washing
- farm ground prices are quickly becoming home prices and climate change.

- Finding growers that whose product we can access via shipping or trucking that doesn't inflate the price beyond what we can afford in quantities a small business can manage that can be verified as 100% WA-grown.
- Food Safety Planning, HACCP certification
- Geography, harvest infrastructure, post harvest infrastructure, milling , dry storage .
- Green-washing of the term climate resilient.
- I am not aware of a market / demand for such crops
- I'm not sure what climate-resilient grains and pulses would be. We grew garbanzo beans this last season and had a total crop failure due to weather, irrigation knowledge and weeds that got out of control.
- Irrelevant TA providers and gatekeepers that don't understand the business needs to be in the driver seat
- It costs almost as much to have something malted as you can then sell the malted grain for. Would be nice to have our own malting equipment!
- Knowledge
- Lack of marketing and sales strategy support is a big deal for us because there is a large degree of education that needs to be woven into the strategy for commercialization of these crops/products. It is not as easy as marketing something else. For example, Sysco wants to work with us, they need data to support claims about climate smart, we have the tools and tech to do this but lack the capital and human power to get it done.
- lack of rain
- Limited risk sharing between farmers and buyers, need to separate out payment for crops from payment for ecosystem services.
- market development, knowledge how to grow in our climate, no farming or processing equipment or knowledge of what is needed
- Money and labor
- no local/regional place to clean/dehull Kernza and flake it
- Not familiar with climate resilient grains, either varieties or markets. Transportation to all markets can be difficult, especially if rail is needed as BN Has little interest in servicing small customers.
- Public awareness of farming practices.
- There are some real issues with processing grains and pulses. There is a big need for de-hullers, cleaners and mills to help farmers produce these products. Also our experience was that markets were fairly limited as most major grocery stores cannot do not work with small distributors, and there was slow interest for direct sales.
- There's such a limited market, or seems to be where we live. Even if there was, there isn't anybody we could sell direct to.
- Time to find markets. Markets that accept crops at scale versus farmers' market quantities.
- Transportation and packing is resource intensive and carbon based.
- We can't find competitively priced Colorado milled flour that's retail ready in 1 or 2 lb packages.
- We don't but our customers might want to purchase them.

- Weather both for growing and storing grain, organic marketing options
- We're a very small operation and don't have staff time devoted to "sales."

Please briefly list or describe the primary processing, distribution, or market challenges your business is currently facing: (n=46)

- Access to capital to expand our food hub.
- Cost of an electric vehicle is prohibitive. Lack of high tunnel funding. bureaucracy is permitting.
- dry bean cleaning, bagging and storage of organic products
- establishing the integration across the entire food supply chain from seed/farm to product to markets
- Few local organic grain buyers limits options
- Finding grain cleaning services on a smaller scale for a few ton a year
- Freezer storage, marketing and delivery within a large area.
- Having the time to do sales channel development. Packaging is time consuming too.
- High cost of shipping and export transport
- Highly volatile pricing for raw product, distribution consolidation, retail buyer consolidation.
- I don't have the resources to hire someone to help with sales materials and sales outreach strategy, this is the number one thing that holds back our business from growth
- Lack of bagging services in Montana with SQF certification.
- Lack of labor and inability to pay competitive wages, housing
- Logistics- labor to get it all done
- Main challenge is definitely distribution: How can people know about the business and how to get the products in their hands.
- Mainly not having any lamb processing butcher shops that are able to USDA certify lamb within 100 miles.
- Marketing is the biggest struggle. Having extra funds to have a marketing campaign beyond just attending Trade-shows.
- Marketing, labor help, equipment,
- Meeting buyers and timing product reviews
- National Distribution
- Need more markets that can pay higher prices for locally adapted organic op seed
- Need processing for chickens and pigs
- New markets for different crops to allow for broader crop rotations.
- Obtaining and maintaining equipment and LABOR for value-added processing. Managing grant application and reporting requirements. Identifying and accessing third-party processing, transportation and distribution.
- Our biggest problem is the cost of trucking
- Our Processing department is having trouble accessing an appropriate facility for Processing. We are also having trouble getting the appropriate equipment for making

operations more efficient. The Food Hub aggregation / distribution needs to expand storage, fleet ext.

- "Our processing is currently hindered by being able to source WA grown pulses that we can actually access. While non-gmo, organic, no spray and gluten-free are attributes we would like to have the most important one is 100% WA grown so we can sell our products to institutions using WSDA grants to purchase food for schools and similar institutions. The growers we have found have limited options for shipping and/or offer small retail sizes or amounts in the tons. It has been a huge speed bump in moving ahead.
- We have good distribution options through the PSFH but are interested in other options that will give us access to new audiences. Educating the market about our product, that is available and how to use it, is also a massive road block at the moment. "
- Price. All inputs have risen dramatically, more than the government stated rates and prices have fallen recently on many products. Part of the pricing problem is because the business elevator above the farm level has had tremendous consolidation in the last 50 years that has made pricing for the farm difficult, and has force consolidation in commercial farming, which has not helped positive pricing for ag products.
- Processing seems to be handled well. Figuring out distribution centers as we grow as well as getting into new markets are big challenges moving ahead
- Processing updates to equipment and operations, long delivery routes, need product nutrition info, having enough skilled staff
- Product labeling challenges , processing availability,
- Right now we are working hard to expand our retail capabilities. We have two major issues one is capacity. We need qualified help to expand sales and more access to USDA processors. The other issue is infrastructure. We have outgrown our current facilities and really need a retail/community space to house our growing activities.
- seed potato certification
- Staying competitive in pricing. Our quality is top notch but for wholesale markets are logistics have some holes that doesn't allow us to be the cheapest.
- "Storage & cleaning of grain for milling.
- Streamlining & promoting online sales."
- storage to extend season
- Three main issues right now are: 1) Finding direct marketing channels to grain mills; 2) Improving our grain cleaning and handling equipment; 3) Continuing to improve our organic nutrition program.
- Very interested in operating an on-farm restaurant, but no commercial kitchen.
- We are in the process of developing a malting facility in rural SE Washington to solve our historical challenges with a shortage of local/regional cleaning and malting capacity. Once constructed, I foresee the cost effectively getting our product to customers in the broader regional market becoming our biggest limitation to success.
- We have so few options locally.
- We need a bagging machine, grain storage, and a dehulling machine. And a melting machine if you've got it! :)

- we need buyers of the product. The market has gone completely soft in the last year.
- We need to move to a different location and need funds for a walk-in cooler and infrastructure. Funds for marketing and management would also be helpful. A co-packer would also be very helpful for our energy bars.
- "We sell seeds through a seed coop, and getting the word out about local and regional adaptation is expensive and success of marketing is hard to measure. Should we have a print catalog? Increase our presence in retail stores? Just promote on the internet? Etc.
- Packaging labor is also very expensive, but we aren't at a scale that we can mechanize. "
- What food safety standards can a seed and grain cleaning operation reasonably meet? For example, FDA requires a pest free facility whereas we remove insects from the product during processing. It feels like we are trying to meet goals that were formulated without us in mind.
- Zero value-added processing facilities or related support are available in my region, which puts the burden of sourcing funding, equipment, staffing, and all the other logistics onto the actual farmers who want to use it. WTF?! No wonder I'm tired and burned out.

Would you like to explain or describe the technical assistance or other support that would help your business develop supply chain relationships, gain price premiums, or access markets? If so, please comment here: (n=27)

- Trade shows aimed at connecting producers with retailers seem effective, we would like our seeds to be for sale at PCC, but don't know what we need to do for that to be possible
- 90% of our business is with one customer and there is low likelihood the other 10% will grow significantly. We have kept our prices low and lost other customers to help this customer grow but now I feel insecure in that we are not diversified and limited in our ability to keep up with their growth without moving and losing more local customers. I could use help developing a broader customer base and making growth plans and contracts that are not too risky or dependent on the plans of one customer. Alternatively, I need help establishing a fair market price that lets our partner continue to develop but does not sacrifice our security.
- Access to markets with the minimum middlemen as possible while adding value at the farm. Value adding would be cleaning, sorting, packaging, etc
- As a relatively small player in a food system that favors the huge, I think we need to seriously consider any option/support that will help us pool volume with other compatible/willing businesses.
- Assistance in completing the development of a supply chain optimization model. Our company invested in the phase one, proof of concept. Now we need \$15,000 to develop the working model. This tool will allow us to determine the least-cost routing for all freight movement, truck, rail, ocean.
- Buyers for regenerative crops. Markets for more diverse crops.
- Co-op development... grain and pulse crop processing for organic farmers to access direct, ID-preserved and value-added markets

- Events that put together buyers and producers
- Food safety regulations have been somewhat challenging. We really do need support expanding our market and being able to find better delivery systems.
- funding for the business to continue to develop, subsidy for the TA, advisor, engineer, accounting, and leverage. give us funding to hire consultants to help us directly.
- Having support in these areas would definitely be helpful. Not sure what that help would look like, but funding could help to pay for that assistance or someone who could provide services in these fields would be great.
- I would like support with our Processing department for increasing efficiencies, access to grants, access to the right sized equipment and appropriate processing facilities.
- I'm not sure who to talk to or the questions to ask to solve problems
- identify sustaining markets
- Just ideas to get it going
- Marketing assistance (improve branding, messaging, website design, ad design and campaign); business assistance (projecting growth and costs, business review), funding for online training or attending conferences to increase staff skills and innovation
- Marketing ideas for ancient grains
- Marketing is something we could use a lot of help in!
- Need better risk sharing arrangements between buyers and farms. Need a lawyer to help build equitable contracting clauses for farmers who are doing the right thing!
- potatoes are a soft crop with an inelastic demand curve. Control of supply is critical in profitable potato production. Having accurate reports of potato supply would help production decisions, with resulting positive cash flow.
- Presently we distribute in all 50 states and Canada
- Spreadsheets that help in pricing out commodities through the value chain would be of extreme importance. I do it all manually and it takes forever with a higher chance of human error. I feel like there has got to be a better way to do it!
- The technical assistance is there. the problem is the possibilities. See above.
- "We would benefit from having a business plan that could forecast our growth with access to new markets which would allow us to make informed decisions about larger raw ingredient purchases allowing for better prices. In that same vein, support in marketing would go a long way for building awareness and securing new, larger wholesale accounts. Additionally, support in obtaining detailed nutritional testing and recipe development that meet the needs of institutional dining programs would be a big step forward in accessing those markets."
- With the help of Great Falls Economic Development Alliance, I hope to apply for a grant that will improve our online marketing and sales processing.
- Would we be able to get more grants if we formed a non-profit or can we remain for profit and get help expanding with technical assistance and grants or low interest loans?
- Yes

From your perspective, what are the 1-5 most important technical assistance, infrastructure development, supply chain, or market development priorities the Center should invest in to support the success of businesses that grow or process climate-resilient grains and pulses? (n=30)

- Access to multi-peril crop insurance for intercropping, Access to agronomists that can manage field trials for our farm., Marketing person for finding mills or bakers that we can sell to direct., Grain handling and processing equipment
- Assist more mills to process grains close to where they are grown., Assist mills, cleaners and co-packers with packaging equipment., Help Food Hubs expand and give them grants to allow them to get more CR products get to market., Help getting school districts involved in supporting CR local products in forms that they can readily use.
- Cannery
- Capital improvements for equipment and facilities , Market development to make these products more widely available , Business support for small farmers to develop business plans and products , Support for distribution. There is a real issue that major grocery retail will not work with small producers, Marketing to consumers with clear ideas how to use new products.
- Capital networks, Vetting of infrastructure projects against predefined goals, Efficient distribution systems for ingredients and end products, Market opportunities for end products made with mission-aligned ingredients / supply chains, Moral support for entrepreneurs invested in the desired outcomes
- Connect growers (us) to market opportunity IF it exists, Develop or access cleaning, bagging, milling and transport services, Develop certification/verification and labeling processes
- direct funding for equipment, leverage funding and investors, delegate, promote and FUND the BIPOC and underserved stakeholders to lead and service, JEDI\$
- don't know
- Education of retail purchasers, Marketers that small companies can all share to help get their products to the next level, More co-packers/millers/malters, or create a list of all to give more options, Funding for start-ups, Continued Food Safety training and follow up
- Education on climate smart growing practices, Assistance with climate smart growing practices, Testing to prove they are climate smart, Finding markets for these grains and pulses, Infrastructure for growing and processing infrastructure
- Education, Onsite visits, Webinars, Funding options, Direct access to getting answers to questions
- FIBC cleaning, reuse, recycling operations, comparing facility relocation, additional facilities vs transportation carbon costs, public education regarding decreasing land and water (i.e., value and necessity for resilient ag)
- Find good help, Find capital, Technical help , Connecting with local markets, Developing new products
- grant to assist with compostable packaging, help producers with education outreach, improved regional distribution networks

- grants, consumer environmental information, helping the consumer understand the need to support climate wise grains/foods, financial incentives for both farmers and consumers to support, eat buy climate wise foods...i.e. millet, education, education, education
- Help us get electric delivery vehicles and farm equipment, Subsidies or support for Grain storage bins, Grain handling equipment
- identifying sustainable markets, cleaning, processing, storage, transportation
- knowledge of growing techniques, equipment needed to grow, harvest, and clean, local markets or transport to regional markets, access to reasonably priced seed, value added commercial kitchens
- Local processing, Local distribution and retailing, Precision Organic Agriculture technical assistance
- Marketing support that can be used for ALL players who are developing products containing climate-smart crops, A common and shared broker or sales rep that can develop relationships with all the regional partners for climate-resilient crops, A platform to bring innovators, farmers, breeders, agronomy and markets together to reduce the friction in getting climate-resilient crops into the market , Access to segregated processing, Access to warehousing- possibly shared area
- More equitable risk sharing between farmers and buyers, More toll processing options
- no idea
- None I already grow those, But our efforts are over shadowed by corporate greenwashing
- Organic Market Development, Government support network
- Processing, Marketing , Crop planning , Grain, plant sciences and testing , Milling
- Regenerative organic cropping practices, Market development, Pricing / hedging skills
- Regional adaptation of seeds
- sources of certified organic seed, infrastructure equipment - threshing, winnowing, milling, seed separation, drying, cold storage, packaging, processing/value-added assistance, technical assistance
- Supply chain access for small to mid-size food producers, Easy to access/navigate requirements for reaching and selling to institutions, Grants that are either paid up front or reimbursable with easy to find and agreeable loan terms, Tax incentives/reimbursements for purchasing local raw ingredients and creating products that benefit local food access, Assistance in market development and scaling for small businesses working with grains/pulses.
- What are climate resilient grains. Are they profitable if they can be grown in Western WA., Dry peas work here. The only market is with seed companies. Is there a market for food or feed?, Is there a possibility to grow dry beans, Is there a profitable market for dry beans?

From your perspective, what are the 1-3 most important TA, infrastructure development, supply chain, or market development priorities that the Center should invest in to support the success of meat businesses in your area? (n=14)

- Capital improvements such as infrastructure for on farm storage and retail. Freezers, buildings, etc, Capacity building for small farms. This could include start up capital to pay beginning salaries for farms beginning to expand retail. , Improve markets for local meat. This could include marketing done on a larger scale to support regional food sources, but this could also include support to producers to develop business plans and marketing messaging to increase sales.
- Co-op development for direct-marketing meat and animal products, Planning and TA for waste and by-products from meat processing, Post-slaughter infrastructure for storage, transport and direct sales of meat and animal products
- Finding land that allows for small scale livestock, Getting a business started, Where to get meat processed
- How to do it, What are the rules, What are needs
- Infrastructure , Market development , Supply chain
- Market development , Infrastructure development , Supply Chain
- Market development, Supply chain , Infrastructure
- More affordable USDA Meat inspectors for small meat butcher shop and processing plants , More help for small meat producers to understand and apply for grants and loans, Help setting up operating and businesses plans for small producers
- processing, storage,
- Regional processing centers for meat animals, Farmer marketing co-op, Farm audit for technical and design support
- Storage, Marketing, Shipping
- The area needs more USDA or State inspected slaughter facilities and more processing facilities and trained workers for those facilities, Following 1 would be a sales plan for local sales. Plans or education to produce QUALITY animals for local sales
- USDA inspection certified meat processors closer to our area. Closest is 45 minutes away.
- USDA slaughterhouse, Transportation to markets, Local market development