

Puget Sound Agricultural Viability Farmer Survey Results



In 2024, American Farmland Trust conducted a survey of former, current, and aspiring farmers to help understand the state of and opportunities for increasing agricultural viability for producers in the Puget Sound region of Washington. Results from this survey can be used to increase awareness of and support for locally based agricultural viability projects. This work is funded by the Puget Sound Partnership and implemented in collaboration with community partners across Puget Sound.



Methods

The survey was administered online in both English and Spanish and promoted through standard, unpaid outreach streams (e.g., emails, social media, partner support, etc.). The survey included questions within the broad categories of location, farm characteristics, agricultural viability, motivations, challenges, support, future of the farm, current revenue, and demographics. Survey questions were informed by an advisory committee and a review of relevant regional literature.



Overview of respondents

In this report we present the survey results from current farmers (342 responses). A majority of these respondents self-identified as white, female, 35-54 years old, and first generation and/or new or beginning farmers.

Farm location

- All 12 Puget Sound counties were represented
- Responses ranged from five to 47 per county (median = 32)
- Counties with the highest number of responses:
 - Kitsap (n=47)
 - Whatcom (n=40)
 - Thurston (n=38)
 - King (n=37)

Farm type

Majority are commercial enterprise (77%)*

Farm size

Majority less than 50 acres (76%)*

Respondent position

Owner and manager (86%)*

Farm ownership: 57% own, 23% both own and lease their land*

Top three production sectors

Vegetables (59%), small fruits (40%), meat (40%)*

Top three markets

Direct sale (81%), wholesale (46%), and charitable donation (24%)*

Revenue

Of the 276 responses to our farm profit question, 33% reported less than \$1 in net profit, and 14% reported \$1-\$1,000 in net profits in 2023

*Percentages are of total responses



Defining viability

Of the 326 responses to the open-ended question “What does agricultural viability mean to you?” the top three emergent themes were:

- **profitability,**
- **sustainability,** and
- **community.**

Additional emergent themes were:

- **land stewardship,**
- **land access/protection,** and
- **market access.**

“Being able to withstand the market pressure and rising input costs while still being able to provide an affordable option for my customers.”

– King County farmer

“It means that my land and business is an important part of the local economy and has the foundation needed to be successful.”

– Clallam County farmer

Profitability

168 respondents (52% of total responses) indicated that agricultural viability means that their farm operations are *profitable*. In many cases, respondents simply stated that they want to earn a living wage for themselves and their workers.

A sampling of responses included:

- “earn a living wage”
- “ability to support your family”
- “at least breaking even!”
- livable wages for all in the food system
- “not farming at a loss”
- “pay employees a livable wage”
- “make ends meet farming”

Other responses clarified that agricultural viability means not having to work a second job off the farm as well as not having to sacrifice one’s values (e.g., staying small, affordable produce, healthy soil, etc.) or work-life balance (e.g., physical and mental health, time for fun).

Sustainability

97 respondents defined agricultural viability as *sustainable farming* both in terms of being able to farm into the future and farm in an environmentally friendly way. 66 of these respondents used the word *sustain* or *sustainability* in their responses.

“Being able to adapt to changes in farming practices and regulations imposed on our farm while still making enough money to continue to stay in business. Hoping to be able to allow my children the opportunity to farm as well if they so choose.” -Skagit County farmer

Community

86 respondents indicated that agricultural viability means reciprocal support between their production of food and the community’s purchasing of locally grown agricultural products.

“Agricultural viability would make it economically feasible to support small and medium producers through all steps of the food production process. It would put more local food into the local community.” – Thurston County farmer

“It means that my land and business is an important part of the local economy and has the foundation needed to be successful.” – Clallam County farmer

Additional Emergent Themes

- **Land stewardship** (n=48) captures responses that indicate agricultural viability means maintaining healthy soil, water, and air – the natural resources farming depends on and impacts directly.
- **Market access** (n=24) captures both markets that farmers sell products in and markets they use to purchase farm services and equipment (e.g., meat processing facilities, labor, tractor services, seed or fertilizer dealers, etc.).
- **Land protection/access** (n=38) captures the need for both affordable and arable farmland access for agricultural viability.

Respondents next identified and rated the local agricultural-related challenges that they face based on perceived severity (see scale).

Challenges were organized in the following categories:

Challenge Scale	
+	Extreme
+	Moderate
+	Minor
+	Not a challenge
+	Not applicable.

Land/ water
Profitability
Infrastructure
Regulation/certification
Livelihood/well-being

The response rate ranged from 303 to 316 responses per challenge.

Within each category, we presented the top three responses rated as “extreme” and noted the top five overall responses with an *asterisk.

Land/water

- Finding affordable land to buy (n=211)*
- Certainty of future water access
- Pressure from urban development

Profitability

- Lack of time to do all needed farm work (n=191)*
- Cost of production compared to market prices (n=178)*
- Cost of labor (wages and benefits) (n=150)*

Infrastructure

- Meat processing facilities
- On-farm infrastructure (e.g. fencing, barns, storage)
- Farmworker housing

Regulation/certification

- Labor wages and compensation
- Land use zoning and permitting
- Mandatory agricultural licenses, permits, and certifications

Livelihood/well-being

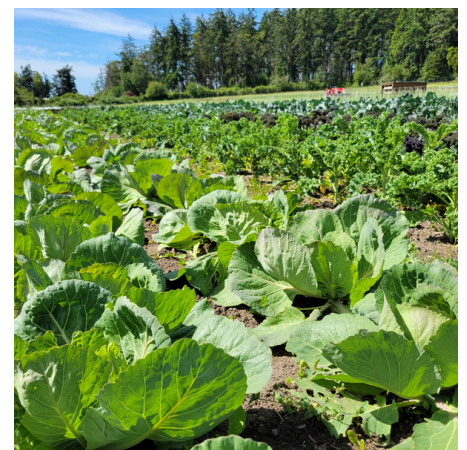
- Personal or family health insurance and medical costs (n=120)*
- Reliance on off-farm work to support my farm and family
- Finding or maintaining affordable housing

Finding affordable land to buy is overwhelmingly the top extreme challenge, capturing 67% of the responses. All five of the top “extreme challenges” relate to farm operation costs.



“Input costs and lack of profitability threaten our enterprise now more than ever. Without raising customer costs beyond sustainable growth limits all capital and requires more and more time, labor and stress to my aging body. I want to see the next generation take up the life but I can’t counsel them [that] it is a profitable or healthy life that it once was.”

-King County farmer



Effectiveness of Supports

Respondents were asked to rate a list of 20 efforts to support farmers in the Puget Sound region as either very, moderately, somewhat, or not effective, asking “*In your personal experience, how effective are these [efforts] in supporting the livelihoods of farmers?*”

Top responses for “very effective” were:

- Funding for **on-farm infrastructure** (n=91)
- Support for **cooperative distribution and food hubs** (n=60)
- **Meat processing facilities** (n=55)
- **Conservation easements** that protect farmland (n=53), and
- Financial incentives for **conservation practices** (n=52)



The number of responses per question ranged from 298 to 304. If we consider the combination of those selecting “very effective” or “moderately effective”, we can add *technical assistance for farm management and practices* and *technical assistance for business planning and management* as two additional high-ranking answers.

Key Takeaways

It is clear that the respondents to this survey are largely in agreement regarding what they see as the biggest challenges to agricultural viability, and that this agreement holds up across location, farm size, cropping system, etc. One commonly cited desire is for increased or greater community support so that producers can, in turn, support the local food needs and economic viability of their community.

Overall, responses indicate that Puget Sound farmers are **struggling to make a profit from farming** due to limited access to, including affordability of:

- land
- farming equipment
- labor
- services, and
- product markets

Due to the demographic homogeneity of the respondents, we cannot claim that these survey results reflect the sentiments of all farmers across the Puget Sound. More work is needed to engage producers who are underrepresented in this survey, leading to a more robust set of recommendations on agricultural viability indicators that reflect all producer types in the Puget Sound.

American Farmland Trust will continue to explore these findings and work with partners to identify policy, planning, and programmatic interventions that are responsive to regional needs and opportunities.