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GOOD TO EAT

**NATIONAL FARMER  
SURVEY REPORT**



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SURVEY REPORT**

May 14, 2020

**MAP OF OUTREACH**



**Nearly 1/3 of small, independent farmers surveyed are potentially facing bankruptcy in 2020**

We asked farmers to imagine the following scenario:

*August sales to restaurants are down 50% or more over last year and August sales at farmer's markets are down 50% or more (due to social distancing.)*

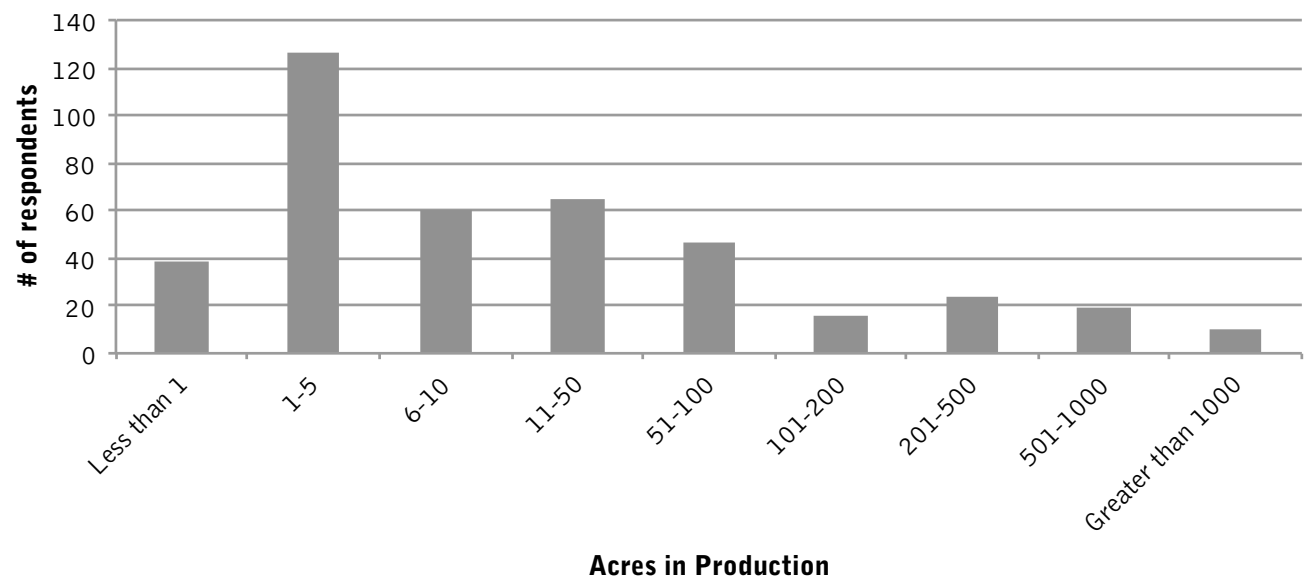
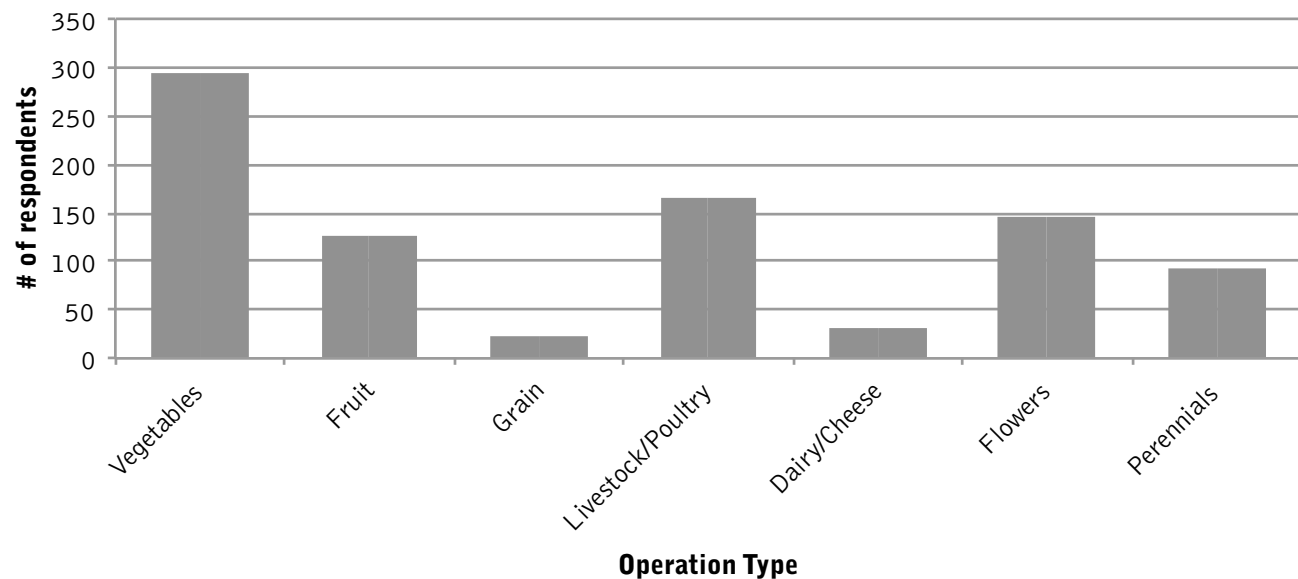
*Under these circumstances, do you think this would potentially force you to close down your operation by the end of 2020?*

**30% responded yes.**

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**OPERATION TYPE &  
ACRES IN PRODUCTION**



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## DEMOGRAPHICS

AGE	GENDER	RACE	FARMING METHOD	LOCATION
18-24: 3.2%	Female: 58.9%	African American/ Black: 2.6%	Conventional: 12.1%	Rural: 67.7%
25-34: 34.9%	Male: 38.2%	Asian: 2.2%	Certified organic: 22.5%	Suburban: 19.9%
35-44: 26.2%	Non-binary: 1.1%	Hispanic/Latinx: 4.1%	Practicing organic/ regenerative/ other: 65.3%	Urban: 12.3%
45-54: 10.8%	Prefer not to answer: 1.6%	Middle Eastern: 0.8%		
55-64: 17%		American Indian/ Alaskan Native: 0.6%		
65-74: 4.8%		White: 83.6%		
75-84: 1.1%		Prefer not to answer: 2.8%		
85-94: 0.2%				
Prefer not to answer: 1.6%				

## NATIONAL FARMER SURVEY REPORT

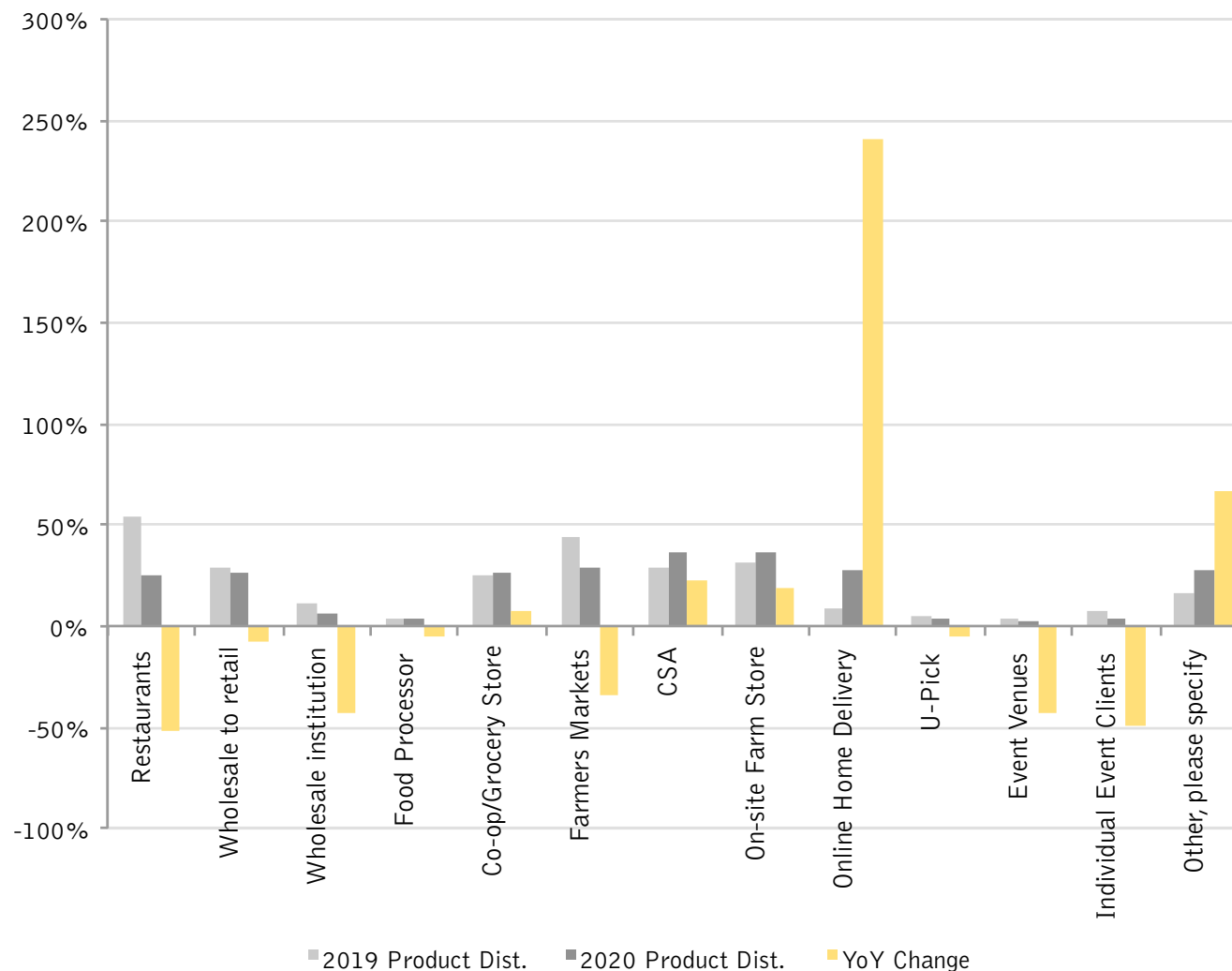
May 14, 2020

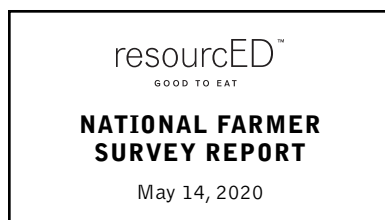
### REVENUE / SALES SHIFT

In the past 8 weeks, sales to restaurants and at farmers markets have dramatically dropped off. Many farmers have instead pivoted to online sales and home delivery.

35.3% of farms reported a decrease in revenue in March and April 2020 compared to that time in 2019. Among these respondents, revenue decreased by an average of 51.3% compared to that time in 2019.

If sales continue to be suppressed by peak season, 36.9% of farms reported that they expect to have excess product that they will be unable to sell. Of these farms, 54.1% do not have adequate access to cold storage or means of value adding or preservation.





## DEBT

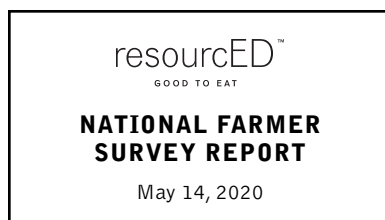
32.2% of farms report that they have struggled to cover their expenses due to COVID-19 related effects.

Of those farms,

- 28.5% are cutting payroll
- 40% are responding by taking on new debt
- 16.4% are postponing bill payments
- 40% are selling off capital
- 5% are reducing employee benefits

37.9% have applied for government support (PPP, EIDL). 58.5% have not received funds. Respondents listed the following reasons for not receiving funds: lack of understanding of how to apply, sole proprietorship, lack of internet access, and the employment of seasonal immigrant H-2A labor.

28.1% have already taken on debt because of COVID-19 related effects, and 32.7% expect to take on additional debt this year because of the pandemic. Of those who expect to take on additional debt, the amount of debt ranges from 15-30% of gross annual income. Much of this debt has come from PPP or other government loans.



## MARGINS & LABOR

Work-force:

Local labor: 52.6%

Self employed/family: 39.4%

Seasonal H-2A or other non-U.S. residents: 7.9%

47.2% expect to employ fewer workers this season. On average, these farms expect to have approximately 50% of their normal workforce.

Respondents listed the following reasons for cutting labor:

- 28.2% lower expected demand or different product sales (e.g., less labor intensive products for restaurants)
- 58% lack of funds to support payroll
- 7.5% lack of local labor
- 5.3% issues with immigration/visa

For those who listed lack of funds, the average amount needed to cover costs was between 20-40% of gross annual revenue.

With their current labor force 24.4% of respondents say they will not be able to keep up with season preparation (seeding, pruning), and as a result, 26.6% expect to harvest decreased volume of product by peak season.

From March 15th to now, of the farms that have increased direct-to-consumer sales, 68.9% reported that their new model is more labor intensive or requires higher overhead costs (e.g. packaging/processing for retail).

66.9% of respondents report that they and their employees are working more hours than this time last year.

Despite the significant changes to their businesses since the onset of COVID-19, 81.5% have not increased prices to account for higher labor requirements or overhead.

We asked, "If conditions continue through the peak season do you predict that your business will close?" 30% of farms predict that they will or potentially will close by the end of the year.