

Regional Food System Assessment Executive Summary

Planting Prosperity and Harvesting Health

Our food choices have far-ranging impacts. We face changes in social, economic, and environmental landscapes that can present important challenges to the food system's sustainability. Organizations are developing programs and policies to address these changes impacting suppliers and consumers. The purpose of this regional food system assessment is to support these efforts by providing information on long-term trends across food system resources. Additionally, we asked stakeholders to develop goals for a sustainable food system and strategies for change.

The "system" in this assessment is focused on the producers in Oregon and Washington and the consumers in the Portland-Vancouver region. The report is organized around nine key resources in the system: the land, water, energy, labor and talent, capital, food-related technology and knowledge, consumer choice and spending power, and social capital. Information is arranged in the form of indicator sheets. This information can be used in the future to establish benchmarks and assess progress toward food system sustainability goals.

The Institute of Portland Metropolitan Studies (IMS) began the assessment by asking a group of food system stakeholders from public, private, non-governmental, and academic sectors in Oregon and Washington to create broadly supported goals for a sustainable food system. Through one-on-one interviews, work-groups and a forum, stakeholders helped us understand what data would be relevant to their needs, and what actions can be taken for positive changes in the system. The assessment builds on work conducted from 2001 to 2006 by a group called Community Food Matters (CFM).

We hope this report will assist program and policy decision makers in prioritizing efforts to shape and strengthen the regional food system. This information is also a foundation for building new and unique partnerships among organizations in food system planning. The sustainability of our economy, our environment, and our society are all directly tied to the sustainability of the region's food system.

On the next two pages you will find a section of assessment findings and a figure summarizing potential next steps. Please contact us if you would like a presentation on specific elements of the report.

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Finding Highlights

Findings and trends listed below can be found in the appendix of indicator sheets by the number in parentheses (A:#). Visit our website to download a copy: <http://www.pdx.edu/ims/foodsystems.html>

Land

- Urban lands increased by 44 percent in Oregon between 1982 and 1997 (A:5).
- Both Oregon and Washington farms have experienced an overall decline in Realized Net Farm Income since 1970 when adjusted for inflation, 13 and 56 percent, respectively (A:11).
- From 2000-2005 the number of organic certified operations increased 67 percent in Oregon, 3 percent in Washington (A:25).

Water

- Total water withdrawals in Oregon increased by 9.6 percent from 1985 to 2005; Washington has experienced an 8.3 percent increase (A:31).
- The percentage of monitored surface water sites with good to excellent water quality in Oregon rose steadily from 28 percent in 1995 to 51 percent in 2005 (A:37).
- Although the fish landings volume has been steadily rising since 1970, the inflation adjusted revenue for fishers has been volatile and generally has decreased since 1970 (A:41).

Energy

- Oregon's farm spending on petroleum products rose by about 94 percent from 1978 to 2002 (A:49).

Talent

- The average age of a farmer continues to climb for Oregon, Washington, and the United States. The number of farmers under the age of 35 has been declining since 1985, when it was 16 percent (A:51).
- Agriculture employment fell from 5.6 percent of Oregon's total employment in 1969 to 3.1 percent in 2005; during the same period in Washington, it fell from 4.6 percent to 2 percent (A:53).
- In Oregon, wholesale and retail trade comprised the largest subsector of agricultural employment, with 67 percent of total agricultural employment in 2002. Farm production employed 20 percent of agricultural employment while processing and marketing employed 7 percent (A:55).

Capital

- Farms owned by individuals or families accounted for 88 percent of total farms in Oregon, 85 percent of total farms in Washington in 2002 (A:61).
- 4.35 percent of farms in Oregon and 5.92 percent of farms in Washington accounted for 75 percent of the total agricultural sales in those states in 2002 (A:63).
- Oregon's food manufacturing productivity is higher than either Washington's or the nation's as a whole. In 2003, it was \$95.40 per labor hour; by 2006, it had risen about 19 percent to \$113.38 (A:71).

Consumer Choices and Health

- Food away from home accounts for 44.2 percent of food budget in the Portland region in 2004 to 2005 (A:73).
- 74.8 percent of adults in Washington and 74.1 percent of adults in Oregon reported not eating the recommended five or more fruits and vegetables per day in 2005 (A:77).
- The number of food stamp participants in Oregon grew by 101 percent and 87 percent in Washington between 1989 and 2004 (A:85).
- In 2006, over 60 percent of the U.S. adult population was estimated overweight or obese based on BMI measurements (A:89).

Box 3: NEXT STEPS

- 1. Draft a regional food system action plan.**
- 2. Convene an Oregon and Washington Food Policy Council.**
- 3. Incorporate food system issues into land use, transportation, public health and economic development planning.**

Box 4: Summary of Suggested Strategies for Food System Goals

Resource Stewardship

- Research sustainable farming and ranching practices.
- Expand funding and implementation of government, academic, business, and non-profit programs to support sustainable practices.
- Lenders expand capital attainment opportunities and revise lending protocols to support businesses engaged in sustainable practices.

Economic Prosperity and Diversity

- Expand food business connection programs.
- Develop and implement mandated point of origin labeling.
- Expand direct marketing opportunities.

Food Access

- Conduct community food assessment research focused on nutrition and access.
- Include food access and agriculture issues in urban planning at city, county and state levels.
- Expand farm to school programs.

Food Choices Support Personal and Community Health

- Expand research on nutrition measures and the health impacts of food consumption.
- Include cooking, nutrition and physical education curriculum at all education levels.
- Include language about nutrition in advertising.
- Develop new policies to discourage consumption of unhealthy foods.

Regional Market Expansion and Infrastructure Support

- Develop and implement institutional procurement standards prioritizing regionally sourced, sustainable, products.
- Establish funding and credit programs to support farming and processing infrastructure (e.g. tools, facilities, irrigation, and transportation improvements).

Agriculture Land-Base Maintenance

- Implement government agricultural land incentives and development disincentive policies and programs.
- Develop and implement farmer entry and land transition policies and programs.

Opportunity and Justice for All Food Workers

- Develop and implement farmer education programs.
- Support an improved guest worker program at the national level.

Resiliency

- Support local and regional agriculture expansion through incentive programs.
- Include food systems in emergency action plans.
- Develop waste processing compost infrastructure to support food waste diversion programs.

Food Choices Restore Cross-System Respect

- Establish community education about food system issues.
- Conduct ongoing cross-sector dialogues about food system issues.
- Increase cross-sector, cross-culture partnerships in food related businesses, policy and program development, and lobbying for policy change.

Source: Food System Forum, April 25, 2008