



Valuing Working Landscapes



Quivira Coalition annual meeting

January 20, 2007

Ken Meter

Crossroads Resource Center



Key financial partners:

- **Northern Arizona University / CES**
- **Quivira Coalition**
- **University of Minnesota**
- **Experiment in Rural Cooperation (SE Minnesota)**
- **Northwest/West Central Minnesota Regional Sustainable Development Partnerships**
- **Northwest Area Foundation**
- **Regional Food Systems Working Group (Value Chain Partnerships project) — Aldo Leopold Center**
- **Aldo Leopold Center for Sustainable Agriculture
Iowa State University**
- **Prairie Rivers and Golden Hills RC&D districts (Iowa)**
- **Community Alliance with Family Farms (California)**
- **Team Santa Rosa (Florida & Alabama)**
- **Maui Land & Pine (Hawaii)**
- **University of Hawaii — Manoa**
- **Roots of Change Council (California)**
- **Ecotrust (Oregon)**
- **W. K. Kellogg Foundation (Michigan)**





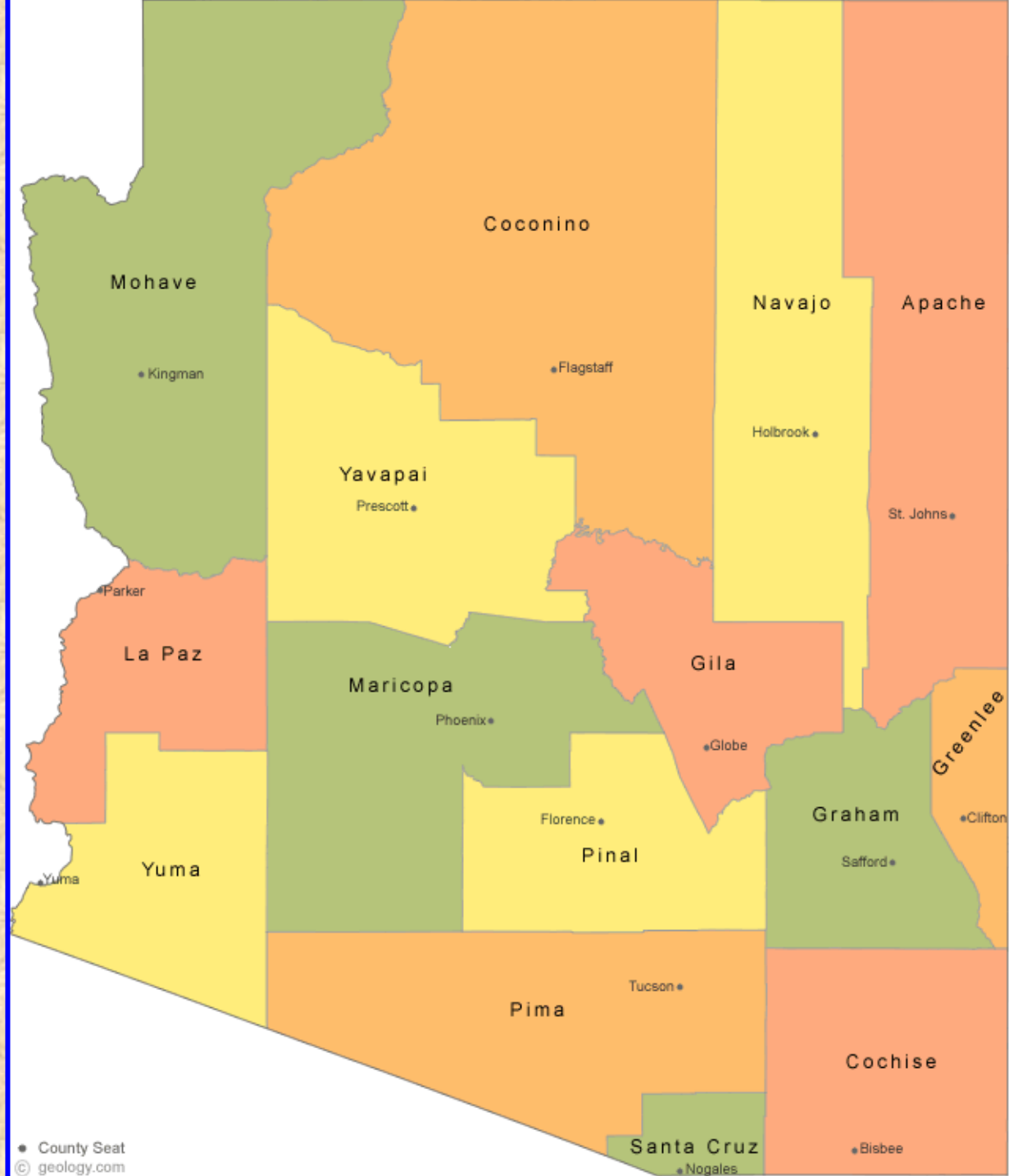
Valuing Working Landscapes

Purpose: To measure the farm and food economies of three Arizona Counties:

- **Coconino**
- **Navajo**
- **Yavapai**



Arizona



• County Seat
© geology.com



Coconino County



122,000 residents

Earn \$2.2 billion / year

Source: Federal Census, BLS



Coconino County

213 ranches and farms (3% of Arizona)

Source: Ag Census (2002)



Coconino County



**6 million acres:
One-quarter of Arizona's
farm and range land**

Source: Ag Census (2002)



Coconino County

Coconino County's cattle inventory:

**80% of cattle live on 14 ranches
with 500 or more head**

**25% of cattle ranches raise
less than 10 animals**



Coconino County

Commodity sales:

**\$0.78 million of crops
and livestock sold**

**\$10.3 million of livestock
and products sold**

Source: Ag Census (2002)



Coconino County

**93 % of agricultural sales
are livestock or livestock
products**

Source: Ag Census (2002)



Coconino County

**Coconino County sells 3%
of the cattle sold in Arizona**



Coconino County

**Number of
farms/ranches
selling livestock,
poultry and
related products fell
40% from
1997 to 2002
(213 to 128)...**

Source: Ag Census (2002)



Coconino County



**...while sales remained at
\$10 million**

Source: Ag Census (2002)



Coconino County

91 ranches and farms hold an inventory of 33,000 cattle.

19,000 (58%) were sold in 2002



Coconino County

County cattle sales totaled \$8.5 million

15% decrease from 1997



Coconino County

- **120 farms and ranches (56%) sold less than \$2,500 per year**
- **74% of county farms reported net losses**

Source: Ag Census (2002)



Coconino County

**Farms and ranches collect
\$900,000 of federal supports
(average 2002-2004)**

Source: Bureau of Economic Analysis



Coconino County

**15 farms produce
2,377 tons of forage crops (hay, etc.)**

Source: Ag Census (2002)



Coconino County

23 farms sell sheep and lambs

Source: Ag Census (2002)



Coconino County

22 farms sell \$10,000 of poultry and eggs



Source: Ag Census (2002)



Coconino County



6 farms sell vegetables

Source: Ag Census (2002)



Coconino County

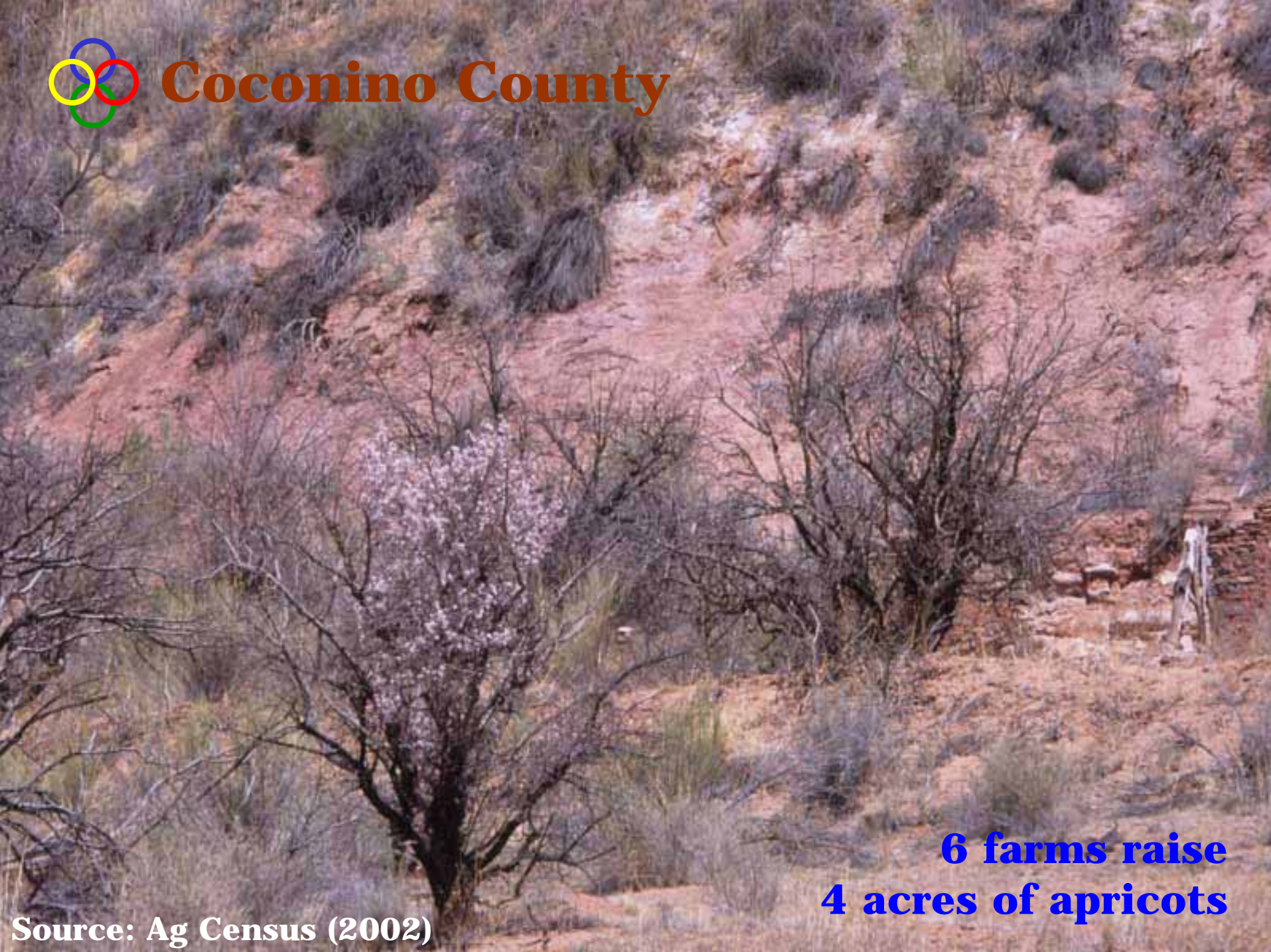
**17 farms tend a total of
50 acres of orchards**

**Of these...
36 acres of apples**

Source: Ag Census (2002)



Coconino County



**6 farms raise
4 acres of apricots**

Source: Ag Census (2002)



Coconino County

First in Arizona in sales of sheep and lambs

Third in Arizona in sales of goats

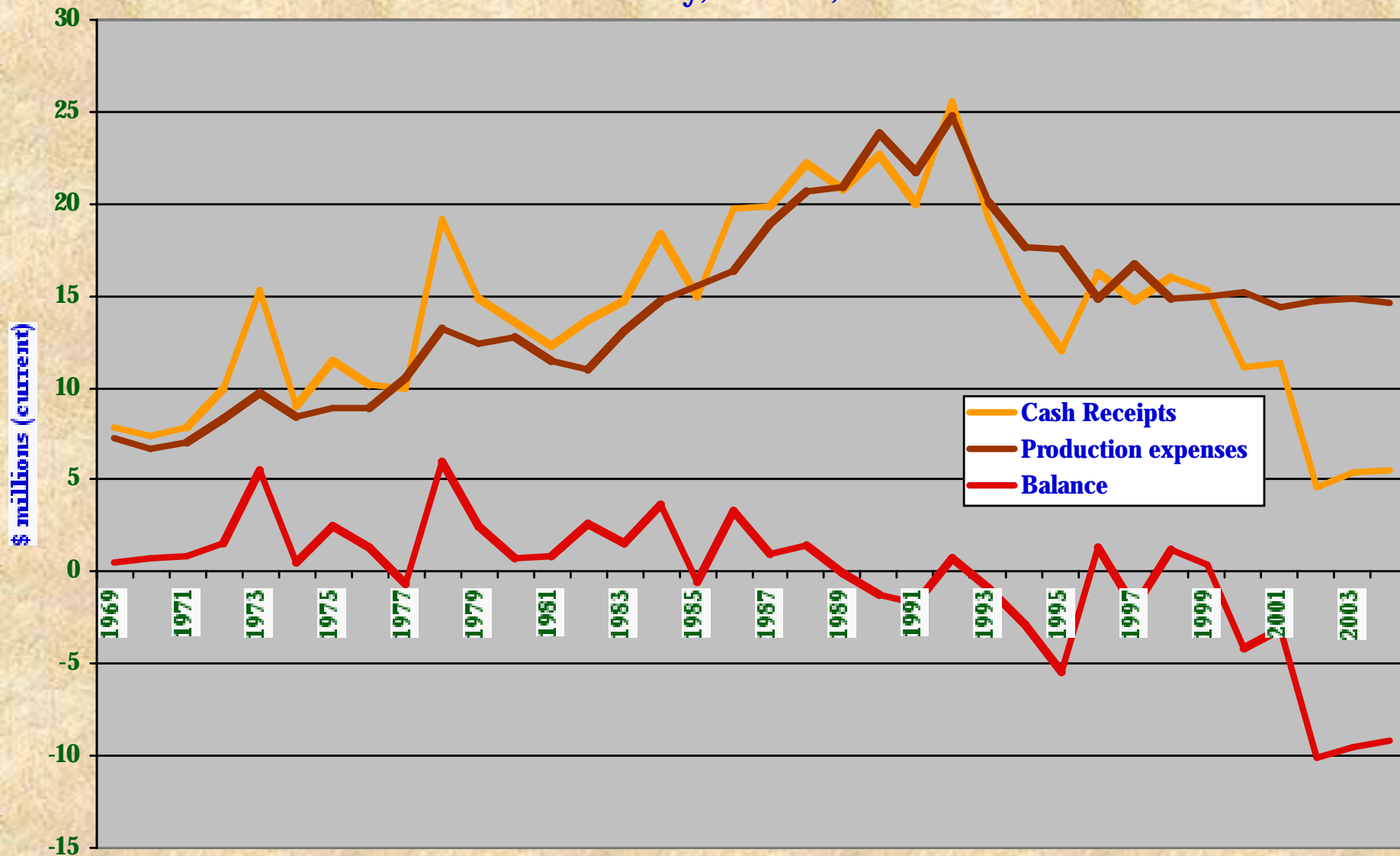
Third in Arizona in acres of sod harvested

Fifth in Arizona in acres of apples



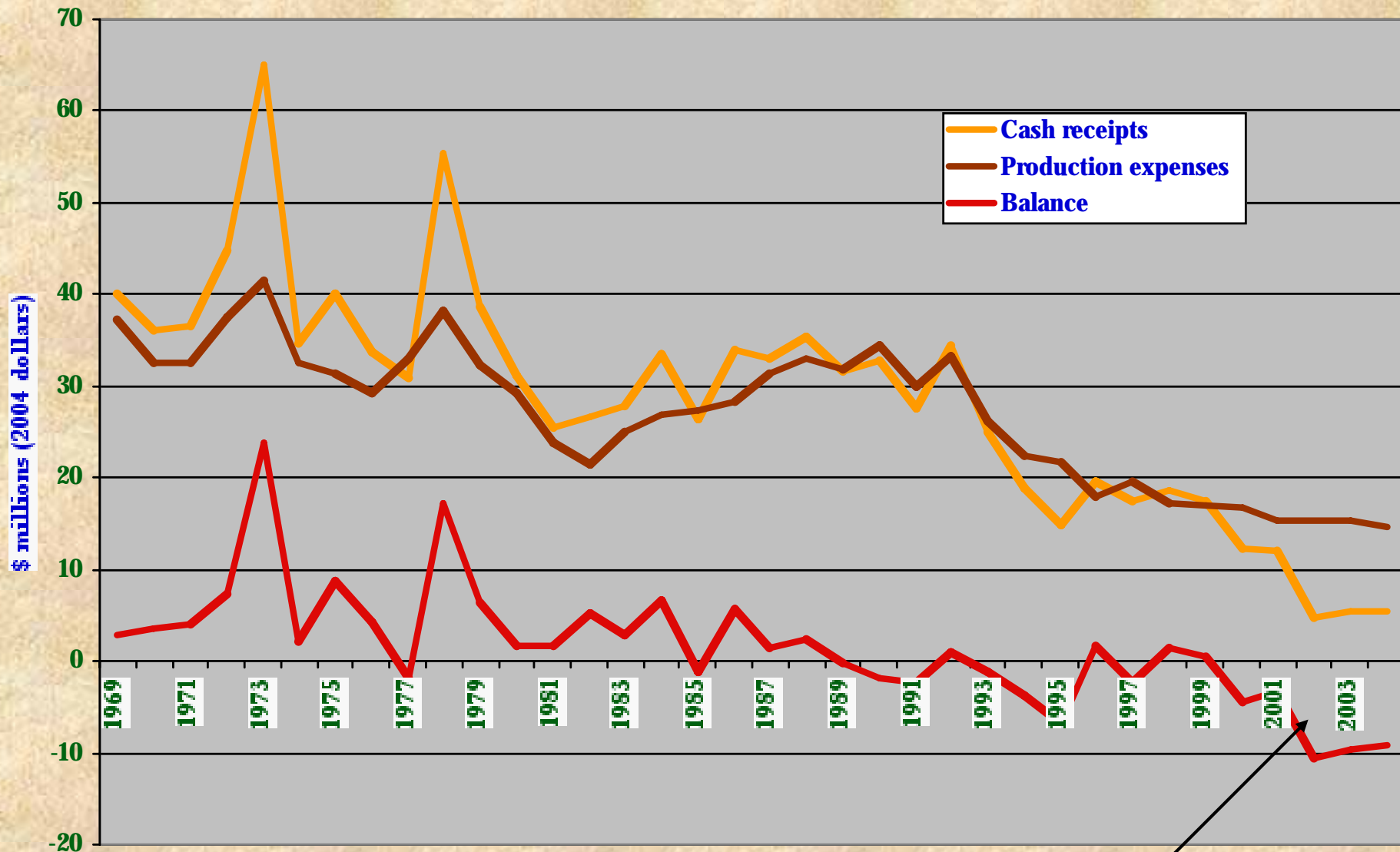


Farm Production Balance in Coconino County, Arizona, 1969-2004





Farm Production Balance in Coconino County, Arizona, 1969-2004



\$30 million lost since 2002



Coconino County

**County ranchers and farmers sell
\$5 million of food commodities per year
(2002-2004 average)...**

...Yet spend \$15 million to raise them

Lose an average of \$10 million each year



Coconino County

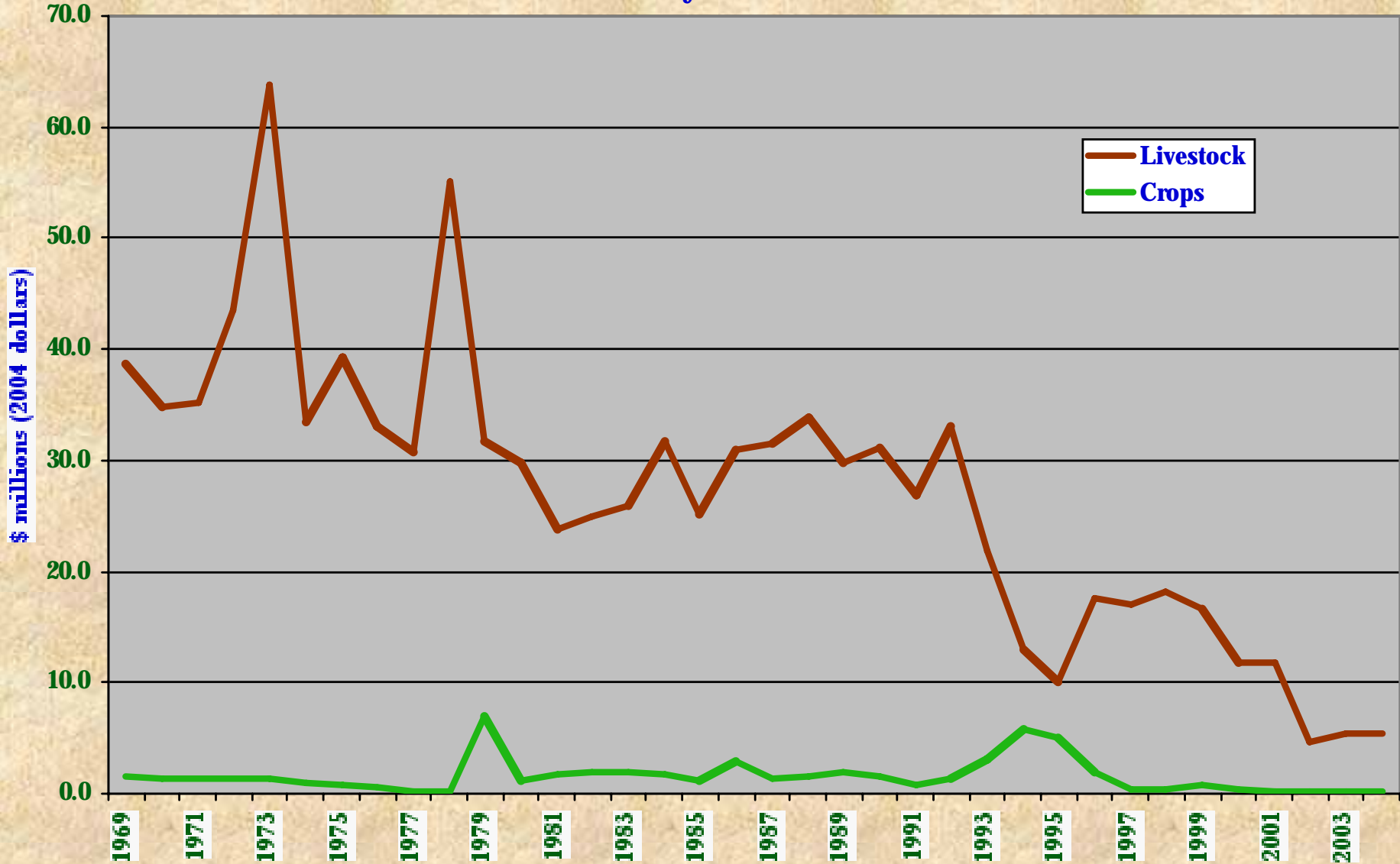


**Producers endured a total loss of \$51 million
over the last 16 years**

Only three years of positive cash flow



Crop and livestock sales in Coconino County, Arizona, 1969-2004

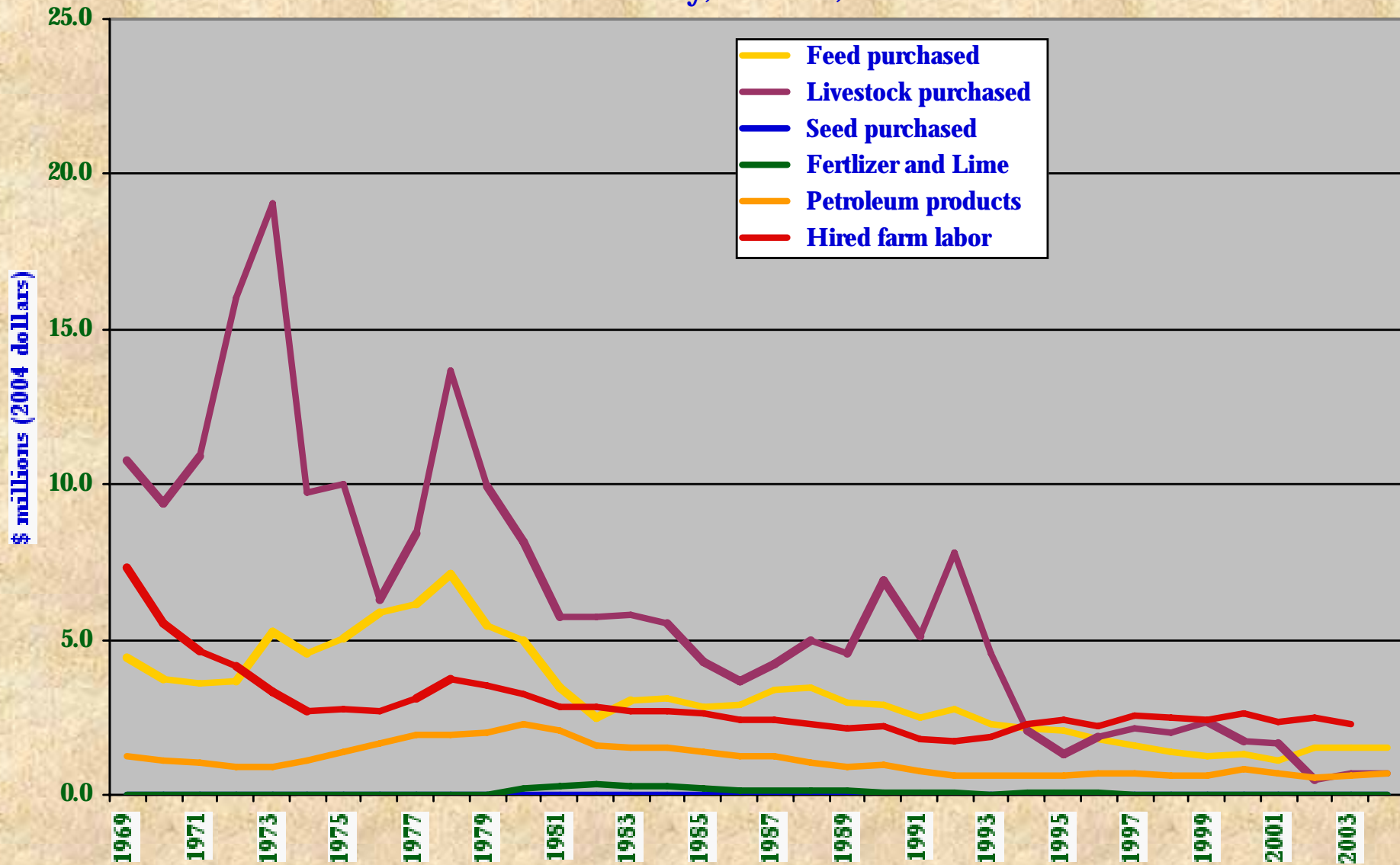


Source: BEA





Farm production expenses in Coconino County, Arizona, 1969-2004



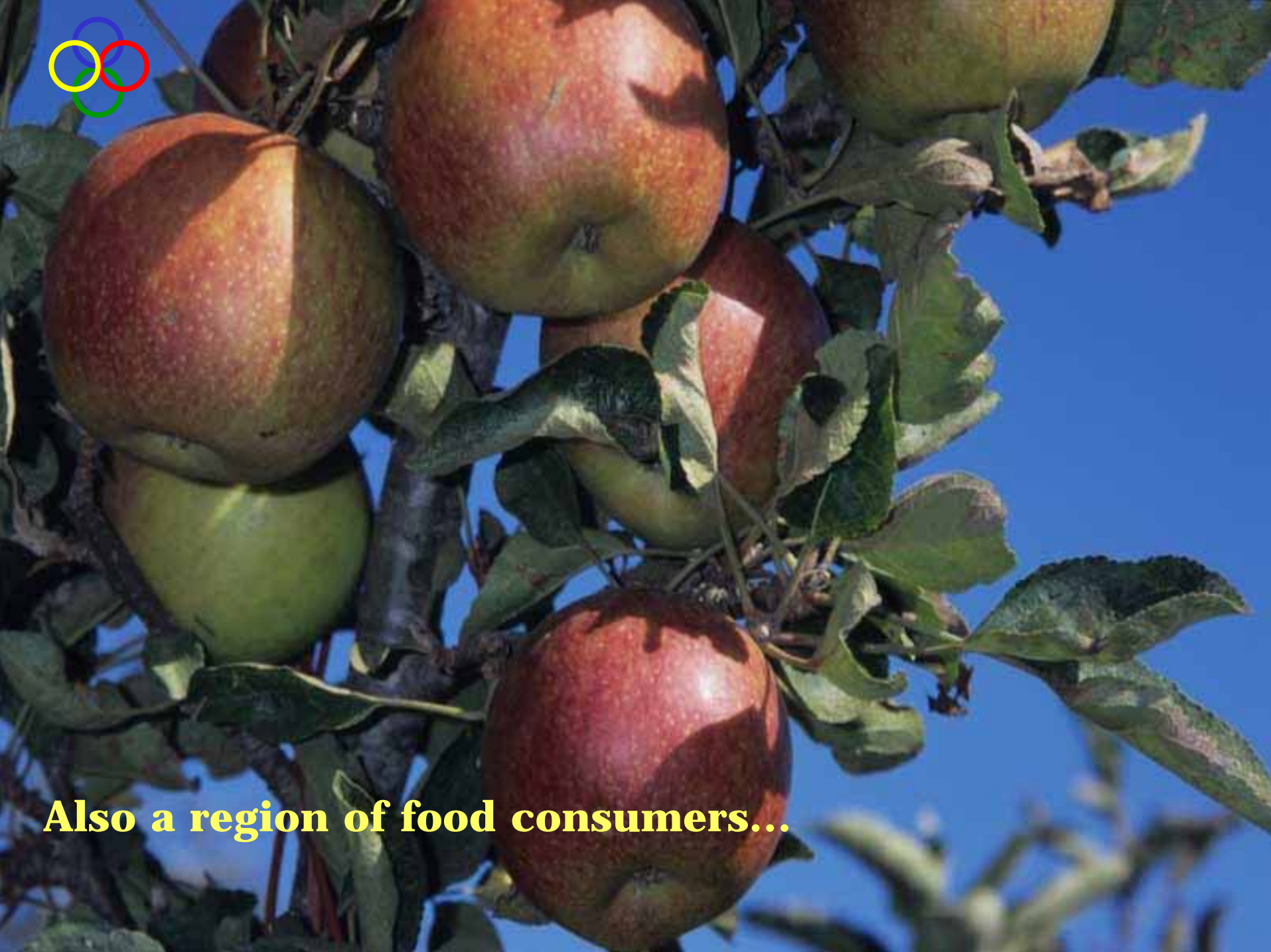


Coconino County



**\$ 6 million of these inputs
are produced outside the county**

Source: Ken Meter estimate based on Ag Census data



Also a region of food consumers...



Coconino County

Consumers spend \$250 million buying food each year

**\$53,000 (0.5% of food produced)
sold directly to consumer**

Source: Bureau of Labor Statistics



Coconino County

To sum up:

Farmers lose \$10 million each year producing food commodities

Spend \$6 million buying outside inputs

Consumers spend \$215 million buying food from outside



Coconino County

Total loss to the county of \$220 million of potential wealth *each year*

40 times the value of all food commodities sold

Yavapai County





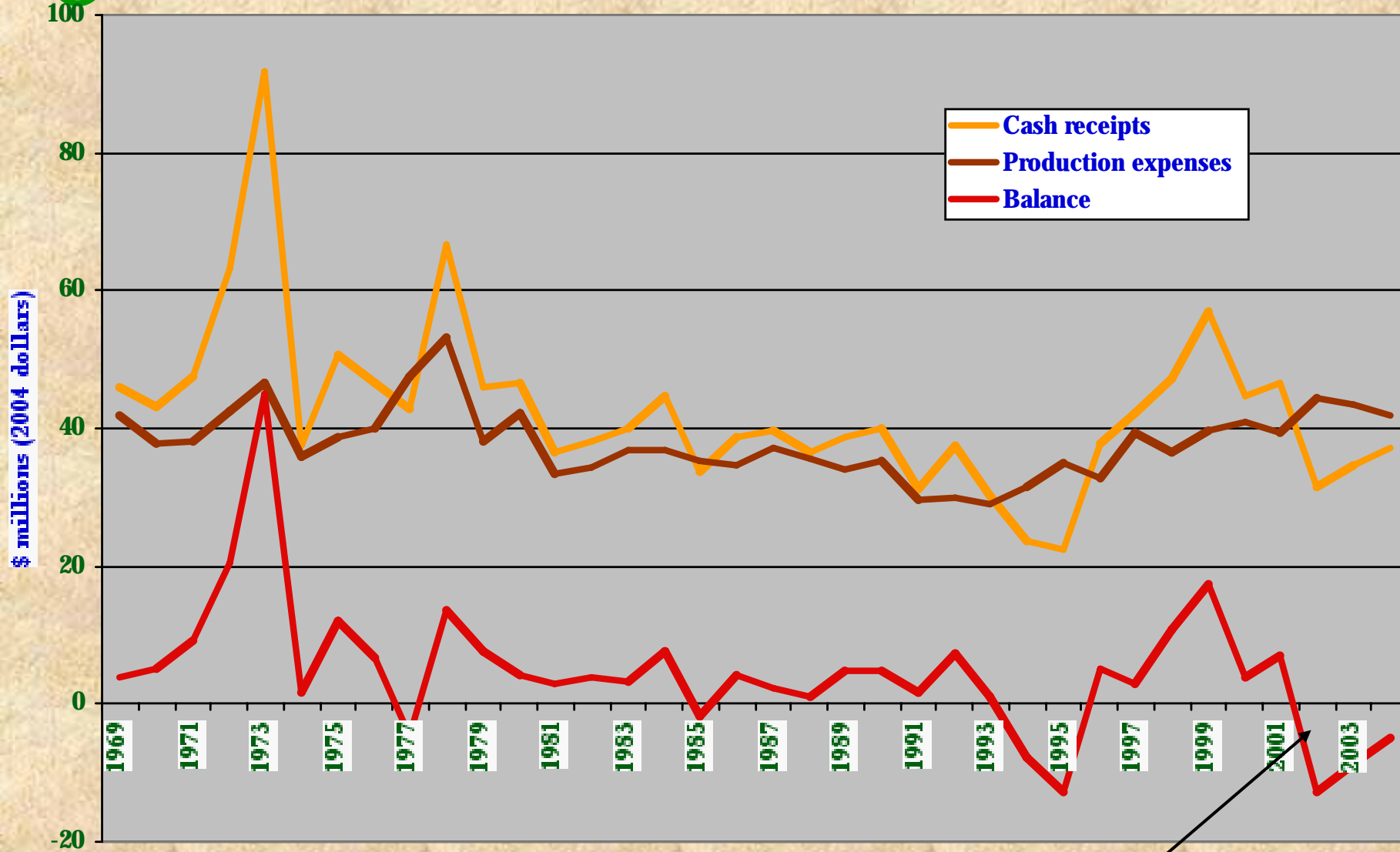
Yavapai County

575 ranches and farms

8% of Arizona's total



Farm Production Balance in Yavapai County, Arizona, 1969-2004



\$26 million loss 2002-2004

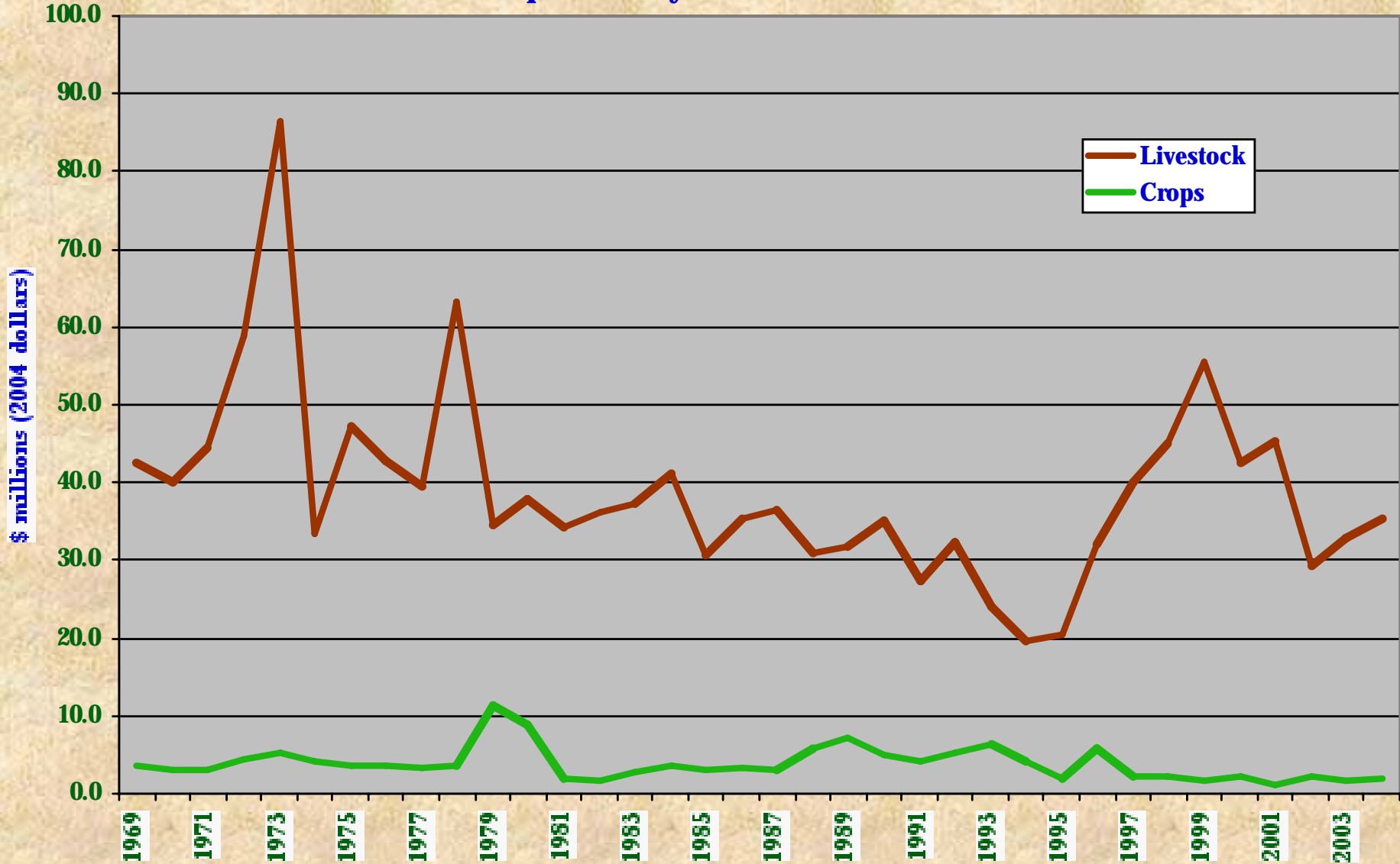


Yavapai County





Crop and livestock sales in Yavapai County, Arizona, 1969-2004



Source: BEA



Yavapai County

To sum up:

Farmers lose \$8 million each year producing food commodities

Spend \$18 million buying outside inputs

Consumers spend \$260 million buying food from outside.



Yavapai County

This is a total loss to the county of \$270 million of potential wealth *each year*

7 times the value of all food commodities raised in the county



Navajo County





Navajo County

291 ranches and farms
4% of Arizona's total

Source: Ag Census



Navajo County

To sum up:

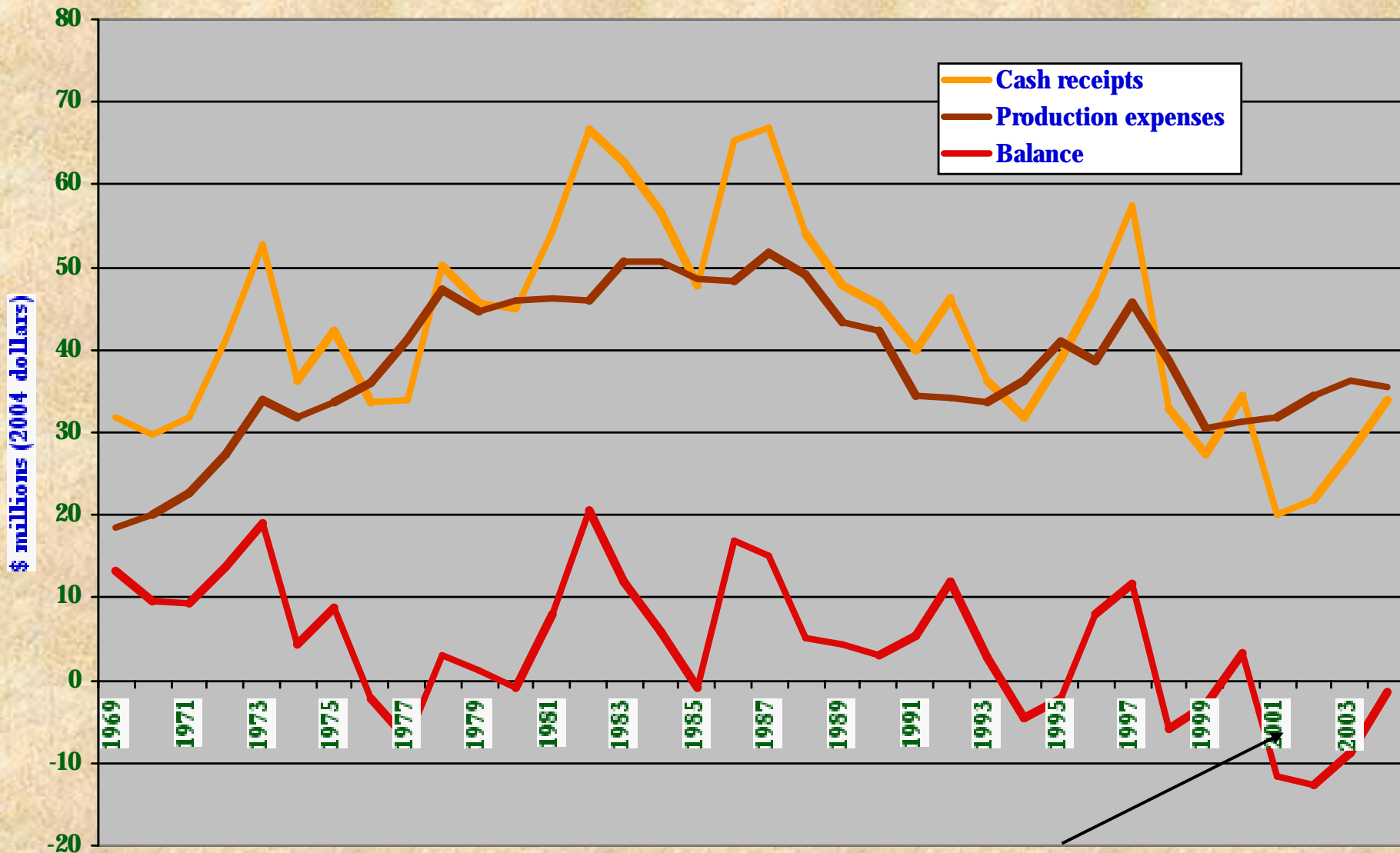
**Farmers lose \$6 million each
year producing food
commodities**

**Spend \$14 million buying
outside inputs**

**Consumers spend \$160
million buying food from
outside**



Farm Production Balance in Navajo County, Arizona, 1969-2004



\$40 million loss 1998 - 2004



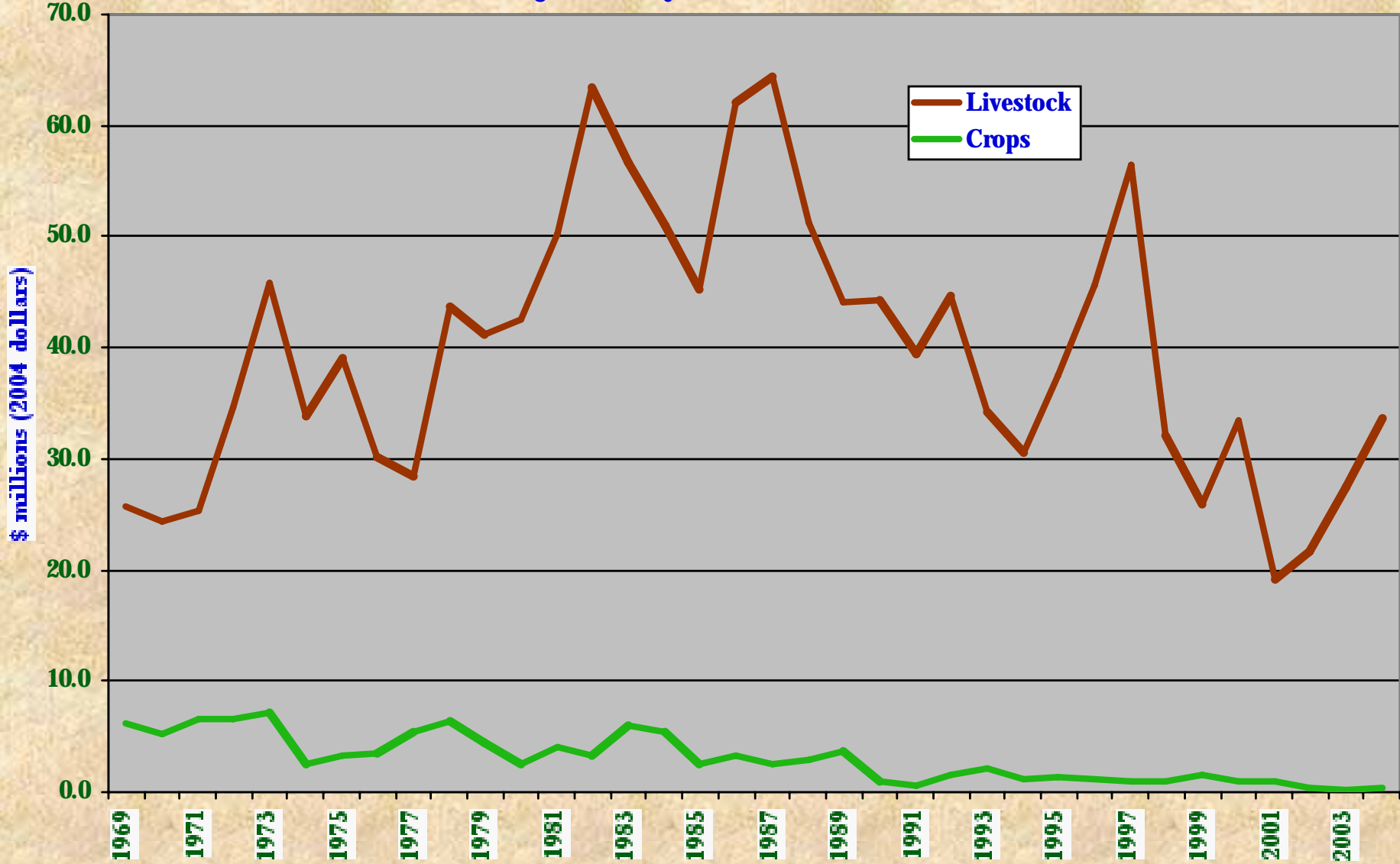
Navajo County

**Total loss to the county:
\$170 million of potential
wealth *each year***

**Over 6 times the value of all
food commodities
raised in the county**



Crop and livestock sales in Navajo County, Arizona, 1969-2004



Source: BEA





Three counties combined

Food Consumed each year: \$ 875 million

Food at home \$ 511

Food away from home \$ 364



Three counties combined

Markets for food eaten at home:

	millions
Meats, Poultry, Fish, and Eggs	\$ 130
Fruits & Vegetables	91
Dairy Products	58
Cereals and Bakery Products	68
Other (incl. sugar, sweets, fats & oils)	166



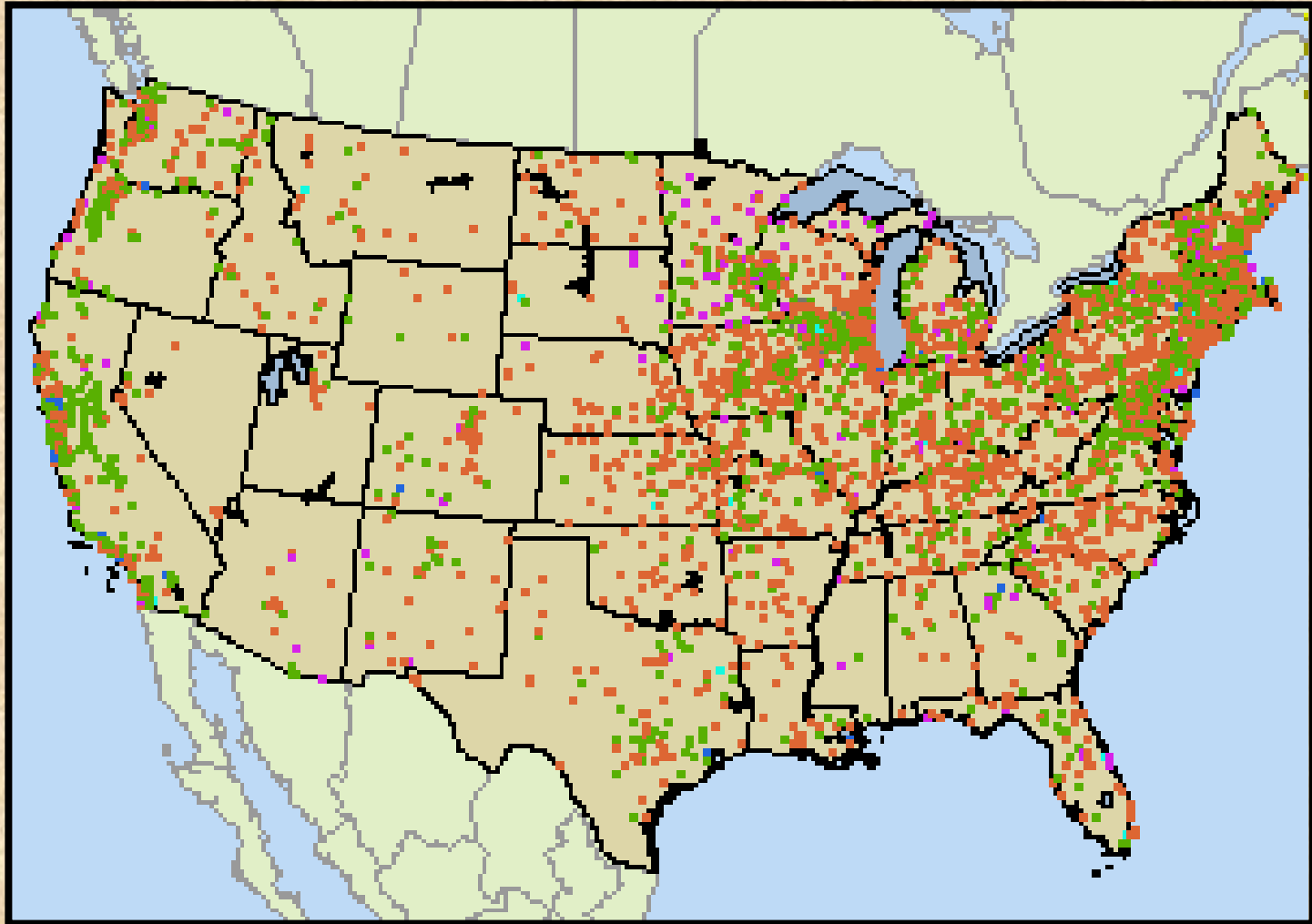
Finding Food in Farm Country

**Ranchers & Farmers
cannot do this alone!**

- **Urban / Rural Partnerships**
- **From Consumers to Co-investors**
- **Food industry clusters —
share risk & rewards**
- **Food (not farm) or rural policies
that support communities
not commodities**



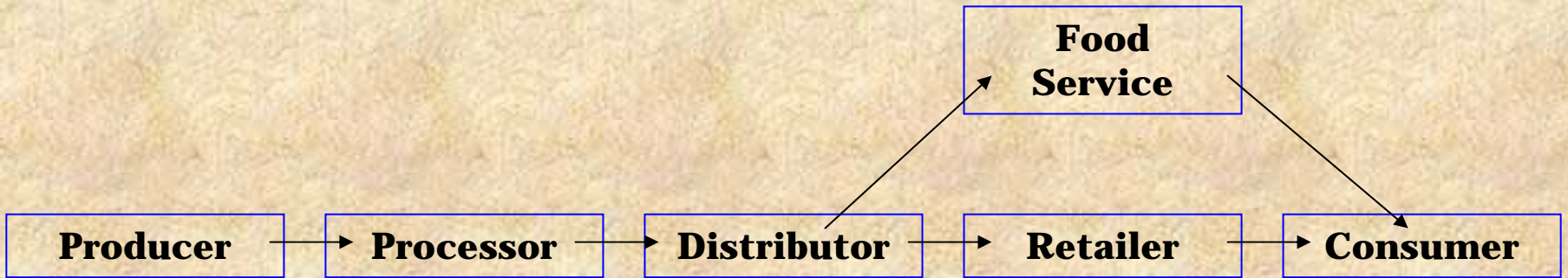
Community-Based Food Systems:



Map courtesy of www.FoodRoutes.org

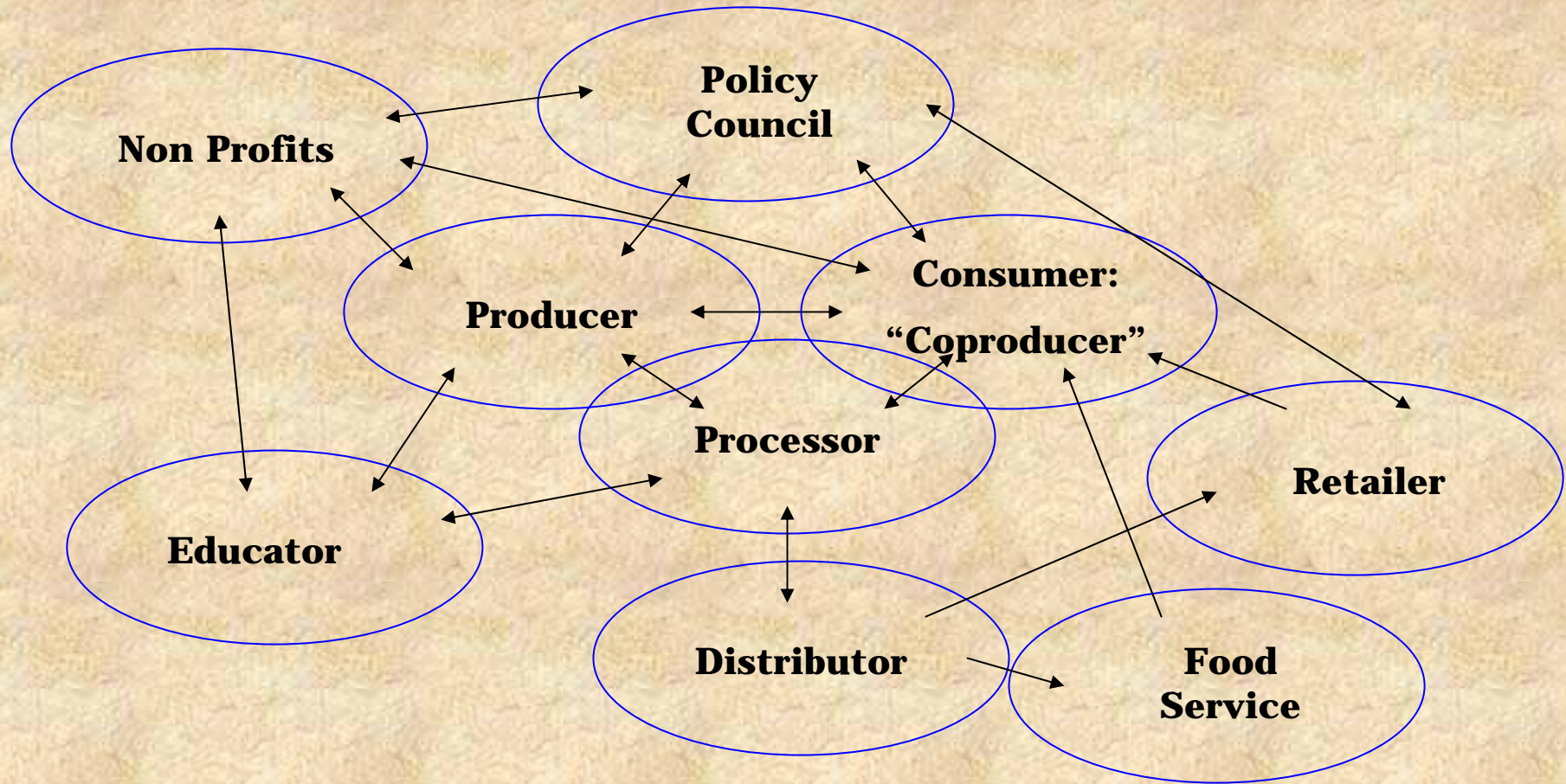


Value Chain





Value Network





Valuing Working Landscapes

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