The State of the Food System

Rogue Valley Community Food Assessment

2025

Developed by the

Rogue Valley Food System NETWORK

growing our local food system

Forward

As I look out my window at the January frost on our family farm in Ruch, I'm reminded of what drew me to this place more than two decades ago: the extraordinary resilience and possibility of the Rogue Valley's landscape and people. Since those early days at Wolf Gulch Farm, I've watched our regional food system evolve through periods of tremendous challenge and remarkable growth.

The document before you represents the culmination of three years of careful listening, research, and community engagement involving more than 2,000 people across our region. It tells a story that will be familiar to many of us who have worked the soil here—a story of persistent challenges but also extraordinary adaptability and innovation in the face of change.

What strikes me most powerfully in these findings is the dramatic 50% increase in small-scale producers over the past decade, even as our region has faced devastating wildfires, pandemic disruptions, and increasingly unpredictable growing conditions. This underscores our community's commitment to local food production and the cultural value we place on sustaining agricultural traditions while embracing new approaches.

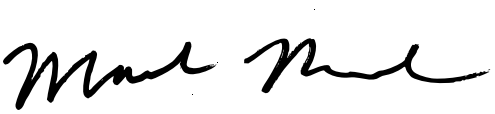
The assessment reveals both encouraging trends and stubborn barriers. We've seen direct-to-consumer sales increase by 80% in Jackson County and value-added product sales triple regionwide, creating new economic opportunities for farm businesses. At the same time, access to land, availability of labor, and food insecurity remain significant challenges that require our collective attention and creative problem-solving.

As both a farmer and educator, I'm particularly struck by how this assessment captures the intersection of agricultural production, environmental stewardship, and community wellbeing. With 76% of surveyed producers implementing some form of regenerative practices, we're witnessing a regionwide shift toward farming approaches that protect soil health and watersheds while building climate resilience—a key priority identified by community members.

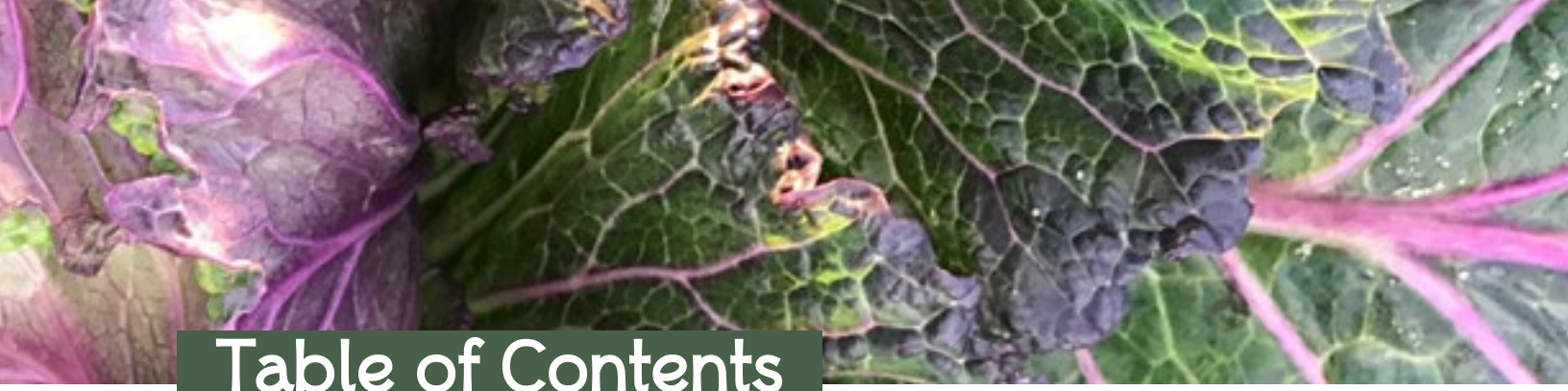
The findings in this assessment don't sit on a shelf but serve as a foundation for action. Through the Rogue Valley Food System Network, we're already using this data to convene working groups focused on four priority areas: reducing hunger and increasing food access, investing in our local food economy, protecting natural resources, and reducing food waste. These interconnected goals will guide our collective work in the years ahead.

For those who have been part of our food system for years or decades, this assessment validates much of what you already know from lived experience while providing the data needed to measure progress and target resources effectively. For newcomers to our region or those just beginning to engage with local food, I hope it offers a comprehensive introduction to the incredibly diverse elements that make up our food system and the many ways you might contribute to its continued evolution.

Every season on the farm teaches the same lesson—that real change requires both patience and persistence, an understanding of natural cycles alongside a willingness to adapt when conditions demand it. As our region continues to face climate instability, economic pressures, and demographic shifts, this assessment provides a shared foundation for the thoughtful, collaborative work ahead. I invite you to find your place in this ongoing story and join us in creating a food system that truly nourishes all who call the Rogue Valley home.



Maud Powell, President, Rogue Valley Food System Network; Farmer, Wolf Gulch Farm; Assistant Professor, OSU Small Farms Program



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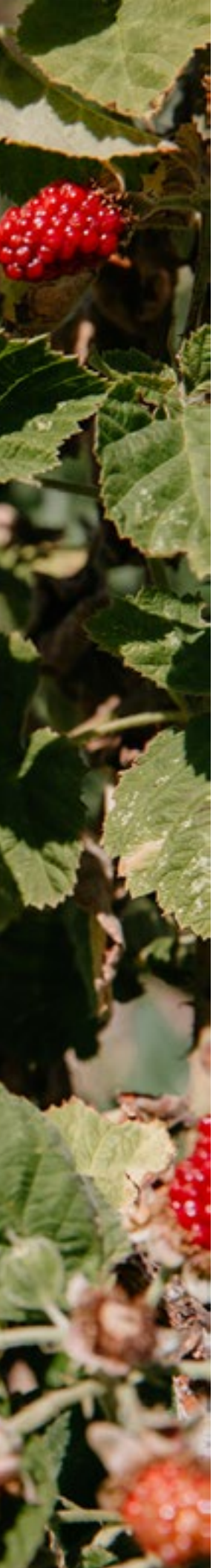
Acknowledging the Land

We would like to acknowledge and honor that we cannot speak of land-based agricultural practices and food systems without acknowledging the first peoples of the Rogue Valley: the Takelma, Dakubetede, Shasta, and other Tribes that we do not know the names of, who tended this land in sustainable and regenerative ways for tens of thousands of years. Members of these Tribes are still alive today, and still working to restore practices of their indigenous foodways. We acknowledge that through colonization and modern agriculture the landscape we now experience is very different than it was, that watersheds have been disrupted by modern invention, that our current agriculture is built upon mining the nutrients from the ancient flood plains, and that the original people have largely been removed and displaced. We commit to the ongoing work of bringing these relations back into harmony.

Acknowledging the Path

This Community Food Assessment represents a collaborative journey of discovery, relationship-building, and commitment to positive change in our local food system. It builds upon years of community work and points us toward a more resilient and equitable food future for the Rogue Valley. We acknowledge that this assessment is not an endpoint but rather a milestone in our ongoing commitment to supporting a vibrant local food system that serves all members of our community.

The path forward requires continued collaboration, innovation, and dedication from all partners acknowledged here and many more who will join us in this vital work. We are grateful for everyone who has contributed to this assessment and look forward to working together to implement its findings and recommendations.



Acknowledging the People

RVFSN Staff:

Current Staff:
Alison Hensley Sexauer, Executive Director
Sheila Foster, Economic Development Advisor
Jenn Theone, Administrative Assistant

Former Staff:
Abigail Blinn, Food and Farm Resource Manager, (2020-2025)
Georgia Julius, Communications Specialist and Graphic Designer (2019-2024)
Ella Burke, Community Food Assessment Coordinator through RARE Americorps program (2023)
Hannah Bryan, Americorps, Accountable Health Communities VISTA, Oregon Rural (2022) Practice-based Research Network, Oregon Health & Science University
Ashley "Q" Quast, Outreach and Engagement Coordinator (2023-2024)

Community Food Assessment Steering Committee:

Elaine Blatt, Senior Policy and Program Analyst, Department of Environmental Quality
Marcee Champion, Food Program Directors, ACCESS
Sam Engel, Executive Director, Rogue Retreat
Greg Holmes, Food Systems Program Director/Southern Oregon Advocate, 1000 Friends of Oregon (former)
Carrie Juchau, Executive Director, Josephine County Farm Collective, Daily Blessings Farm
Cheryl Kirk, Family & Community Health/SNAP-ED, OSU Extension Josephine County (former)
Marguerite Merritt, Cheese Emissary & Marketing Manager, Rogue Creamery
Grace Anne Michel, Food Programs Coordinator, ACCESS
Scott Perry, Board President, Medford Food Project
Jessica Pieklak, SOU Institute for Applied Sustainability, Southern Oregon University
Bethany Raya, Community Impact Director, United Way of Jackson County
Sam Watson, Community Health Manager, Jackson Care Connect
Vincent Smith, Director, Division of Business, Communication and the Environment, Director, The Farm at SOU: A Center for Sustainability
Kira Welch, Coordinator, Institute for Applied Sustainability, Southern Oregon University

Consultants:

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Georgia Julius, Graphic Design
Eva Skuratowicz, SOURCE, Southern Oregon University Research Center

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Every farmer, food worker, and community member who shared their stories and perspectives

RVFSN Leadership:

Board of Directors and Council:
Maud Powell, Associate Professor of Practice OSU Small Farms Program, Farmer Wolf Gulch, RVFSN Board President
Anne Carter, General Manager, Medford Food Co-op, RVFSN Board Treasurer
Jo Ann Shannon, Executive Director, Rusted Gate Farm, RVFSN Board Secretary
Doug Lofhdal, Farm Director, Family Nurturing Center, RVFSN Board Member
Rhianna Simes, Farmer, Verdant Phoenix Farm, Cultivate Oregon, Council Chair (2020-2024)
Kristen Lyon, Chef/Owner, Jefferson Farm Kitchen, Council Chair (2023-2024)
Marcee Champion, Food Programs Director, ACCESS
Sheila Foster, Owner, Passage Plan Consulting
Greg Holmes, Food Systems Program Director/Southern Oregon Advocate, 1000 Friends of Oregon (former)
Amber Ferguson, Executive Director, Rogue Food Unites
Rebecca Slosbeg, Co-Executive Director, Rogue Valley Farm to School
Josh Bilbao, Agricultural Resource Conservationist, Jackson County Soil and Water Conservation District
Elise Higley, Owner/Farmer, Oshala Farms, Board Chair, Our Family Farms, Former

Council Members (2021-2024)
Vincent Smith, Director, Division of Business, Communication and the Environment, Director, The Farm at SOU: A Center for Sustainability
Sam Engel, Executive Director, Rogue Retreat
Elizabeth Tobey, Rogue Farm Corps (former)
Brook Colley, Associate Professor and Chair of Native Americans Studies, Southern Oregon University
Kim Freeze, Dean of Academic Affairs, Art, Science & Technology, Rogue Community College (former)
Meghan Montgomery, Agricultural Resource Conservationist, Jackson County Soil and Water Conservation District (Former)
Maggie Gartman, Nutritionist, Rogue Valley Farm to School
Kristin Smith, Farm Manager, Josephine County Foodbank/Raptor Creek Farm
Sara Mosser, Executive Director, Rogue Riverkeeper

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Steven Addington Photography

Introduction

How We Got Here

The last decade in the Rogue Valley has been a whirlwind of change and adaptation for our food system. From the advent of Community Care Organizations to the response to COVID to the legalization of cannabis and hemp, to the impact of wildfire, the Rogue Valley has seen its share of challenges that go above and beyond the normal boom and bust economic swings that are so common in the history of agriculture.

The arrival of the global COVID-19 pandemic and the response to it turned life upside down for communities worldwide, including farmers and food producers. In the Rogue Valley, we saw lockdowns and safety measures take hold, supply chains disrupted, restaurants and markets closed or restricted, and labor shortages become a critical issue. As unemployment soared and white collar workers relocated to working from home, agricultural and food processing workers were designated essential, disqualifying them from unemployment benefits and often forcing them to choose between having an income or protecting themselves and their families. Families and individuals struggled to feed themselves and to make ends meet, and the disparity in society, and specifically our food system, was made apparent. These issues highlighted the incredible reliance we have on those who produce our food. It also made clear the importance of local food systems and the relatively robust food system that has been cultivated in the Rogue Valley. While grocery stores that relied upon food produced outside of Rogue Valley found themselves with empty shelves, many community members turned to local farms and growers markets for their food, boosting demand for home-grown produce and bringing a renewed appreciation for the resilience and adaptability of our local food network. Seed sales skyrocketed as people returned to an agrarian vision of home grown food, and traditional cooking skills saw a renewed popularity. Sourdough starts were a prized possession.

This renewed focus on local food systems during the pandemic highlighted the power of community and the ability of the Rogue Valley's local food network to meet critical needs in times of crisis. Initiatives like the 2019 Oregon House Bill 2579, which invested $15 million into increasing the purchasing of local food by schools,

allowed Rogue Valley Farm to School to pivot and win a $1 million USDA contract to provide fresh fruits and vegetables to families when the shutdowns began. The close working relationships, distribution network and packing facilities originally created to support the use of locally grown food in school meals enabled the swift redistribution of thousands of pounds of fresh fruits and vegetables to families each week in a program that utilized food that local farmers feared would go to waste due to massive restaurant closures. The smaller, more agile, and deeply interconnected local food system rose to the challenge, demonstrating its resilience and adaptability in meeting the needs of the community.

> "The pandemic highlighted the incredible reliance we have on those who produce our food. It also made clear the importance of local food systems, and the relatively robust food system that has been cultivated in the Rogue Valley."

To layer onto the challenges our community faced in 2020, the Almeda Fire ripped through Talent and Phoenix, two small towns along the I5 corridor, destroying more than 2,600 homes in less than twenty-four hours. The community rallied to help, providing food and developing infrastructure that continues to serve as a foundation for disaster relief in our region. Many of those who lost their homes were agricultural workers. With no home or work, devastated by their losses, many were forced to leave the area. The impact on the community, and the food system, was significant.

Over the past decade, the Rogue Valley has faced significant challenges from wildfires and droughts, each leaving a mark on the region's agricultural system and economy. Wildfires, in particular, have impacted crop production and market dynamics in complex ways. Prolonged smoke exposure reduces sunlight, slowing fruit development and altering crop quality. Ash residue on crops has increased labor costs for cleaning, while the use of personal protective equipment by farmworkers added additional logistical challenges. Wine grape growers reported significant losses due to the smoke, saying that the vintages of those years held the smoke flavor through the fermentation process.

The economic impacts have been substantial. Farmers have reported losing key wholesale accounts and seeing reduced sales at farmers' markets as customer numbers drop during smoky periods. Between 2019 and 2023, the Rogue Valley experienced a phenomenon of "August emigration," where many residents temporarily left the valley seeking relief from extreme heat and smoke—right in the middle of the most productive farming season. This migration, combined with declining tourism, including lower attendance at major events like the Oregon Shakespeare Festival, created ripple effects throughout the local food economy, from farms to restaurants.

Drought conditions have brought a distinct but equally significant set of challenges to the Rogue Valley's agricultural community. For many farmers, 2022 marked a turning point, as heat domes and low annual rainfall led to irrigation ditches being shut down and widespread crop losses. Reduced water availability has forced farmers to adopt new water management strategies, explore drought-resistant crops, and experiment with dryland farming techniques. While these approaches demonstrate innovation and adaptability, they often come with increased costs and require significant adjustments to traditional practices.

The combined impacts of wildfires and drought underscore the urgent need for continued adaptation and collaboration. Strengthening the resilience of the Rogue Valley's agricultural systems will depend on collective efforts to address these evolving environmental pressures, ensuring the region can sustain its farming heritage and meet the needs of the local community.

Prior to and overlapping the impact of COVID and wildfires, the Rogue Valley also experienced a surge in the cultivation of cannabis and hemp due to the legalization of both crops in Oregon. This boom brought new economic opportunities and many new challenges. For many farmers facing declining profitability with traditional crops, the cannabis and hemp markets provided a much-needed lifeline. However, the rapid expansion also led to increased competition for water and land resources, and it raised regulatory and environmental concerns. It also led to a number of farmers investing in cannabis and hemp production, only to find that the lack of labor, harvesting and drying infrastructure, along with the market dropping out, left

The last decade has been a period of significant transformation for the Rogue Valley's food system. Despite facing numerous challenges, our community has shown remarkable resilience and innovation. As we look to the future, these experiences will guide us in creating a more sustainable, equitable, and resilient food system for all. The Community Food Assessment is a critical tool in our journey to creating a thriving food system that supports and is supported by the local community. Led and coordinated by the Rogue Valley Food System Network, the assessment involved three years of community engagement and research engaging more than 2,000 individuals, agencies, farmers, food producers, consumers, educators, business owners and many more. This report is the result of that work.

them holding huge debt. Balancing the benefits and infrastructure needs of this booming industry with the need for sustainable practices became a key focus for local policymakers and farmers alike.

Over the last decade there has also been a shift in the healthcare sector, with the introduction of coordinated care organizations (CCOs) in Oregon aimed to improve healthcare delivery and outcomes by bringing together various providers to offer more integrated care. This shift had a ripple effect on the food system, emphasizing the link between nutrition and health. AllCare and Jackson Care Connect started supporting programs that connected patients with fresh, local produce, recognizing that nutritious food is fundamental to good health. This trend fostered stronger connections between healthcare and agriculture in the Rogue Valley.

Alongside this trend was an increase in additional food access programming and funding. As identified by both the 2024 Community Health Assessment and this Community Food Assessment, the lack of availability and affordability of fresh, local food in grocery stores is a critical barrier to access and community health. Increased funding for food banks to purchase local food for clients has helped to improve access for some, and the state legislature backing of programs such as Double Up Food Bucks and SNAP has been increasingly impactful, making access to fresh produce more affordable for many. The recent advent of Protein Bucks, a protein supplement program currently being funded through the CCO's, has been hugely successful. There continues to be a gap, and an opportunity, in the grocery retail sector, as most large retail stores continue to source very little, if any, fresh local produce and products.

Over the last 10 years, several key agricultural trends have emerged. There has been a growing emphasis on sustainable farming practices that protect the environment and ensure long-term ecological and economic viability. Farmers are adopting techniques such as crop rotation, cover cropping, dry farming, and using locally adapted seed and organic practices to enhance soil health and reduce chemical use. The local food movement has gained significant momentum, with more consumers seeking out locally grown produce and supporting farmers markets, CSA programs, and farm-to-table initiatives. This trend has strengthened the connection between farmers and the community.

In a Nutshell: Food Assessment Recommendations

The RV Community Food Assessment and associated Action Plan together serve as both a snapshot of our current state of the food system and a roadmap to achieving the vision of a thriving, equitable, resilient and healthy local food system in Rogue Valley that serves all who live here.

We asked the community at large the following question: "Which food system goals are most important to YOU AND YOUR FAMILY?"

The following Four Priority Goals floated to the top as issues of most importance to the 600 survey respondents. These issues were then aligned with the key findings of the Community Food Assessment research to form the basis of an Action Plan that sets out strategies and objectives to address the key findings and issues identified as barriers to the Rogue Valley obtaining a thriving, equitable and resilient food system. These four goals and key findings were also used to craft the vision for what a thriving food system looks like in our region.

Food Insecurity Rates Are Decreasing in the Rogue Valley: In Josephine County, food insecurity dropped from 15% in 2022 to 12.7% by 2024. Over that same span, rates dropped from 12.7% to 10.5%.

We Are Making a Difference!

Source: Oregon By the Numbers: Key Measures for Oregon and Its Counties published by the Ford Family Foundation and OSU Extension Service, 2024

Priority Goals and Key Findings

1. **Ensure access to healthy food for all:** Food insecurity continues to be a central issue of concern in the Rogue Valley and increasing access to healthy, fresh, affordable food for all community members was identified as a key need.

2. **Invest in a thriving local food and farm economy:** Strengthening local agriculture by supporting farmers, food producers, and businesses in the region has been identified as core to developing and maintaining a strong, resilient economy overall in the region.

3. **Build healthy soils and protect watershed health:** Encouraging sustainable farming practices that safeguard natural resources and ensure long-term environmental health is vital to the long-term sustainability and resilience of the economy, the environment and the community.

4. **Reduce food waste and related solid wastes:** Creating systems to minimize food waste and promote efficient use of resources across the food supply chain will reduce the region's carbon footprint, ensure more food is available to those who need it and create a more resilient food system that recycles resources rather than losing them.

The four goals will form the basis of the working groups that will be composed of key partner organizations, farmers, local business owners and concerned citizens. Each group will work together to implement the action items identified within their respective goal, with a focus on measurable impact and long-term sustainability.

The Rogue Valley Food System Network

The Rogue Valley Food Systems Network (RVFSN) is a 501(c)(3) nonprofit organization consisting of a council of up to twenty members representing the diverse sectors of the food system in Josephine and Jackson Counties. RVFSN also works with a larger network of food and farm businesses, organizations, and individuals working together across the region.

RVFSN emerged from the series of meetings, community conversations, and "hunger summits" on food insecurity and access, initiated in 2006 with the Jefferson Funders Forum, culminating in the community food assessments and action plans for both counties in 2012 and 2013. RVFSN was formed to build cross-sector collaborations that would address the main goals and actions identified by the assessment. In 2017, RVFSN merged with THRIVE (The Rogue Initiative for a Vital Economy) and has continued to convene key stakeholders, build relationships, and provide public education and outreach based on emergent needs. RVFSN has been dedicated to incubating projects that work toward improving access to local food, promoting healthy eating, enhancing social equity, and developing economic vitality. RVFSN has continued to grow and hold the vision of fostering leadership and collaboration toward a resilient, ecologically sound, and economically viable food system.

What is a "Food System"?

People talk about food systems, and the truth is, depending on who you speak with, a food system can mean a lot of different things to people, primarily because it is so interwoven with every aspect of our lives and foundational to our economy. In general, a food system is defined as all the processes and activities involved in feeding a population, from growing, harvesting, and processing food to packaging, transporting, marketing, consuming, and ultimately disposing of it. It involves the people, resources, policies, and infrastructure that support these activities, along with the environmental, economic, and social factors that influence how food is produced and distributed. All of us are part of the food system, in myriad ways.

It's important to note that a food system is more than just a series of steps; it is deeply influenced by policies, culture, and values. These elements shape everything from what we grow, to how we distribute food, and even to who has access to it. The food system intersects with many other community priorities, such as advancing equity and addressing the destabilized climate patterns experienced by farmers. A just and sustainable food system ensures that all people have access to nutritious food, supports the livelihoods of those who produce it, and preserves the health of the environment for future generations.

Food systems don't operate within rigid boundaries. The interconnected nature of global food production and the influence of both state and local policies mean that our local food system is part of a much larger network. However, for the purposes of this plan, we are focused on the food system within southern Oregon's Rogue Valley, specifically in Josephine and Jackson Counties. Here, we aim to create recommendations that reflect the unique needs and opportunities of our region, guiding us toward a more resilient and equitable food system that aligns with our local values and goals.

> "A just and sustainable food system ensures that all people have access to nutritious food, supports the livelihoods of those who produce it, and preserves the health of the environment for future generations."

About the Rogue Valley Food System

History of the Rogue Valley

The agricultural history of the Rogue Valley, Oregon, is deeply rooted in the stewardship of the Indigenous Tribes who originally inhabited the region, including the Takelma, Shasta, and Latgawa peoples. These Tribes skillfully managed the land through practices such as controlled burning to enhance the growth of essential medicines and food sources like camas, acorns, and berries. With the arrival of European settlers in the mid-nineteenth century, the landscape of agriculture began to change dramatically. Settlers introduced new crops and livestock, transforming the valley into a hub for grain, fruit, and dairy production.

By the late nineteenth and early twentieth centuries, the Rogue Valley had established itself as one of the premier fruit-growing regions in the country, particularly known for its pears and apples. Over the decades, agriculture in the valley continued to diversify, embracing viticulture, specialty crops, organic farming, seed farming, and medicinal herbs. Today, the Rogue Valley is a rich tapestry of traditional and innovative agricultural practices.

Current Food System

The agricultural landscape of the Rogue Valley is both diverse and vibrant, reflecting a deep commitment to sustainable practices and local food production. Jackson County, in particular, stands out as a non-GMO seed sanctuary, underscoring the community's dedica-

tion to preserving the integrity of its crops. The valley is home to a thriving ranching and livestock industry, producing high-quality dairy and meat products that are available both at local markets and directly from farms. While hay and forage continues to be the region's largest agricultural product by significant margins, this region also hosts some of the country's most renowned food and agricultural companies, including Harry & David, Naumes, and Amy's Kitchen, which contribute to the valley's economy.

The diversity of agricultural products in the Rogue Valley is remarkable, ranging from grains and medicinal herbs to world-class cheese and locally baked bread made with wheat grown right here in the valley. The climate is particularly favorable for fruit cultivation, making it ideal for growing pears, peaches, plums, wine grapes, and a variety of other fruits. This agricultural bounty supports a growing community of food entrepreneurs, whose innovative products are increasingly found on local shelves and at any one of the farmers markets, which occur seven days a week. As this sector continues to expand, the need to support small, local businesses becomes ever more critical, ensuring that the Rogue Valley remains a thriving hub for sustainable and diverse agricultural production.

Small businesses in the Rogue Valley have significant growth opportunities through direct-to-consumer sales and value-added products. With 380 farms generating over $12 million annually through farmers markets, CSAs, and farm stands, local producers can connect directly with consumers while maintaining their identity. Additionally, 213 farms producing value-added goods like jams and sauces have seen a threefold sales increase to $71 million since 2017. Infrastructure such as food hubs, co-packers, and shared-use kitchens could further support small businesses in scaling up and maximizing revenue by turning raw products into high-demand, higher-value offerings; however, we have seen a gap in current infrastructure meeting the demand of the entrepreneurial market.

What is a Food System Assessment and Action Plan?

A food system assessment serves as a comprehensive study to provide an in-depth look at how our local food system currently functions. It examines every stage, from food production and processing to distribution, consumption, and waste management. By analyzing these components, we can identify strengths and areas for improvement, ensuring that our food system effectively meets the needs of our community.

For the Rogue Valley, conducting a robust food system assessment was a critical step in pinpointing the challenges and opportunities within our regional food system. This current food system assessment builds upon past assessments done by community partners in 2012 and 2013.

A food system action plan is a strategic framework that outlines a community's vision for its food system and details the steps needed to achieve that vision. It is akin to the long-term planning documents used by cities and counties for land use, transportation, and economic development. Our intention is to share this plan widely with our city and county leaders and support localized food system planning to become more prevalent. This plan serves as a guide for how we can cultivate, distribute, and consume food in ways that support the health and well-being of everyone in the Rogue Valley community.

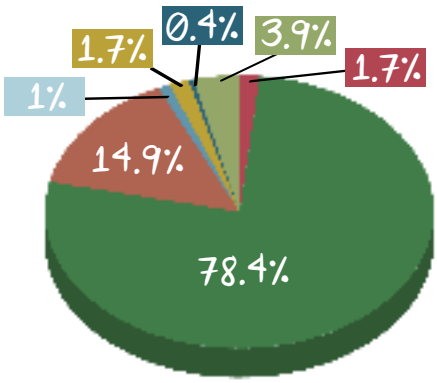
Food system planning has not always received the attention it deserves, partly because there isn't a dedicated "Department of Food" to oversee these efforts. Yet food is intricately connected to many critical aspects of community planning, including land use, water resources, transportation, and infrastructure. Recognizing this, more cities and counties are beginning to integrate food system planning into their broader strategic efforts, bringing focus and intentionality to the development of sustainable and resilient food systems. In

Population

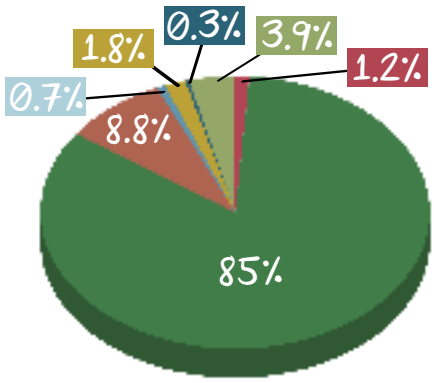
	Jackson County	Josephine County	All of Oregon
Total Population (July 2022)	221,644	87,730	4,240,137
Population Increase Since 2010-2020	9.9%	6.5%	10.6%
Bachelors Degree or Higher (2018-2022)	30%	18.6%	35.5%
Persons Living in Poverty (2021)	13.5%	16.8%	12.1%
Median Household Income (2017-2021) *	$61,020	$51,733	$70,084
Unemployment Rate October 2023 •	3.6%	4.2%	3.3%
Percentage in Workforce (2017-2021)	57.7%	49.5%	62.5%

* Calculated in 2021 dollars • Not seasonally adjusted

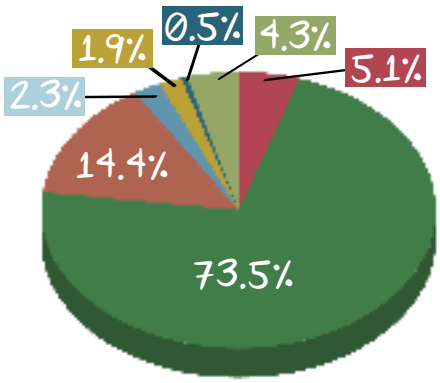
Race/Ethnicity (2022)



Jackson County



Josephine County



All of Oregon

Asian

Hispanic or Latinx

Native American, Non-Hispanic

Two or More Races

White, Non-Hispanic

Black, Non-Hispanic

Native Hawaiian & Other Pacific Islander, Non-Hispanic

the absence of these government support systems, food networks, policy councils, and alliances have stepped in to ensure cross-sector thinking, collaboration, and action. We intend to use this plan to collaborate with local governments, integrating its findings into their strategic planning efforts, while also building on grassroots efforts to bring real solutions to the challenges identified.

How was this assessment and action plan created?

The RVFSN has been actively engaging stakeholders to address barriers and explore opportunities within our food system since its inception. The commitment to undertake an update of the Rogue Valley Community Food Assessment began in 2019 when RVFSN received funding from the Oregon Food Bank to host five larger convenings under the FEAST (Food, Education, Agriculture, Solutions Together) program in Jackson and Josephine Counties. This process, previously used in the 2012 and 2013 community food assessments, marked the beginning of our listening phase.

In early 2020, we hosted one in-person meeting in Williams, Oregon, before the COVID-19 pandemic hit, forcing the remaining four meetings to be conducted via Zoom. Despite these challenges, these initial gatherings laid the groundwork for our continued engagement efforts. Over the next three years, we held several additional listening sessions and focus groups to deepen our understanding of the community's needs and opportunities.

The RVFSN steering committee was formed in 2021 after a year-long internal strategic planning process. This process highlighted the necessity of a comprehensive community food assessment to create a roadmap for addressing key food system issues in our region. In 2022, we received in-kind support from the AmeriCorps program, bringing Hannah Bryan on board as a part-time staff member. Hannah's efforts were pivotal in conducting community outreach and identifying the critical questions we needed to address.

In 2023, we were fortunate to partner with the RARE AmeriCorps program, bringing Ella Burke on board full-time. Additional funding from All Care and Jackson Care Connect enabled us to hire Kitchen Table Consulting, propelling us into our first Food Solutions Summit in 2023. This summit officially launched the community outreach phase of our process and provided a key opportunity to hear from our regional food system stakeholders.

Throughout 2023, we dedicated significant time to

meeting people where they were—at community meetings, in offices, and at food pantries—gaining invaluable insights into the lived experiences of our community members. This year was also crucial for developing additional funding partnerships with the Gordon Elwood Foundation, SOU Institute for Applied Sustainability, Alumbra Foundation, and Roundhouse Foundation.

With these partners on board, we ramped up the final round of data collection and hired New Venture Advisors (NVA), consultants specializing in food system planning and sustainable food business development, to support our small staff in completing the assessment and action plan. We also brought on a part-time coordinator to assist with outreach.

How to Read this Assessment and Action Plan

The Rogue Valley Community Food Assessment and Action Plan is divided into seven sections, each representing a major sector of the food system:

Each section of the assessment and action plan includes the following subsections:

1. Agricultural Production
2. Environment and Natural Resources
3. Food System Infrastructure
4. Labor and Employment
5. Consumption and Consumer Awareness
6. Food Security, Health and Resiliency
7. Food Waste Management

Overview:

Each of the seven sections begins with an overview of this food system sector in the Rogue Valley and the state of Oregon.

Key Findings:

These are the key opportunities or challenges identified by the Community Food Assessment research.

Sector Facts:

These are the key secondary data points for Jackson and Josephine Counties. These mostly quantitative data are generated by government and nonprofit organizations (i.e., the Census of Agriculture, the U.S. Census, or Feeding America).

Survey and Focus Group Findings:

These are the qualitative data from the community survey, farmer/rancher survey, and sector-specific focus groups.

Trends and Challenges:

These are the key findings and themes that emerged across the secondary data, surveys, and focus groups.

Merits Further Investigation:

These are topics that are important to understand or need more research in order to more fully understand the local food system.

Community Highlights:

This section highlights the community organizations working on-the-ground in these sectors to improve the food system.

This report represents the collective knowledge and effort of many individuals, agencies and organizations who have been working in the Rogue Valley food system, often for decades. The tremendous strides the Rogue Valley has made towards creating a thriving local food system would not have happened without their tireless work. Likewise, this report is made possible by their guidance, support, and feedback over the last three years. Our hope is you will see this food system assessment as both an inspiration and a foundation upon which to continue to build and grow a healthy, resilient local food system. It is also an invitation to become more involved if you aren't already. Whether you are a farmer thinking about relocating to the Rogue Valley, an entrepreneur considering opening a new venture, or a parent wanting to ensure healthy food for your children and grandchildren, this document is intended to help you better understand the local food system, the possibilities in front of us and the impact you can make on it all. ***Enjoy!***

Methodology & Community Engagement

NVA and the RVFSN network co-designed a research and planning process that would both engage a broad swath of stakeholders and hear from core food system stakeholder groups. This included:

- Secondary data collected across all sectors of the food system. Data sources such as the U.S. Census, Census of Agriculture, Natural Resource Conservation Service, the Oregon Department of Agriculture, and Feeding America were accessed to identify relevant county-level food system metrics.
- A community-wide survey that was open to all community members from February through May 2024. The community survey, which asked residents about their goals, perceptions, and challenges when it comes to accessing healthy local food in the Rogue Valley, received 593 responses across Jackson and Josephine Counties. While a robust response rate, results may not represent all Jackson and Josephine County residents. However, the survey provided notable findings in combination with other tools used in the assessment.
- A farmer/rancher survey that was open to agricultural producers from February through May 2024. The farmer/rancher survey, which asked producers about their challenges, barriers, and needs when it comes to producing food, received 80 responses from agricultural producers in the Rogue Valley. This was not a statistically significant sample, therefore results may not represent Jackson and Josephine County farmers and ranchers generally. However, the survey provided valuable information in combination with other research tools used in the assessment.
- Focus groups conducted in the spring of 2024 to hear from key stakeholder groups that may have been missed earlier in the engagement process. Focus groups were held on the following topics:
  - Food insecurity in the Rogue Valley
  - Emergency preparedness in the regional food system
  - Farm and food work in the valley
  - Food buying and distribution in the region
  - One on One Interviews with additional food system stakeholders

Then, draft plans were shared with the community through a prioritization survey and stakeholder meetings.

Altogether, we have included the challenges, hopes, and dreams of over 2,000 community members in this report. This comprehensive engagement process has been instrumental in shaping the Rogue Valley Community Food Assessment and Action Plan, guiding us toward a more sustainable and equitable food system for our region.

Agricultural Production

1.1 Overview of Agricultural Production in Rogue Valley and the State

Agriculture in the Rogue Valley is a story of resilience, adaptation, and a community deeply connected to the land. Nestled in a region known for its breathtaking landscapes, the Rogue Valley's agricultural sector has been evolving rapidly, carving out a unique niche within Oregon's broader agricultural framework. Since time immemorial, Indigenous peoples have practiced traditional ecological knowledge, participating in the cultivation and stewardship of these lands, ensuring sustainability and harmony with the natural environment long before modern agricultural systems took root. The diverse microclimates of the Rogue Valley—ranging from cooler mountainous areas to warmer valley floors—support a wide variety of crops and farming practices, further enriching the agricultural landscape. Local and regional Tribes remain actively engaged in land stewardship, Indigenous foodways, and sovereignty, while modern agricultural systems continue to shape the region's impact on the land.

Over the past decade, the Rogue Valley has experienced an extraordinary surge in the number of small-scale farmers. This growth is nothing short of remarkable—since 2012, the region has seen a 50% increase in the number of producers. This is in stark contrast to the state of Oregon as a whole, which witnessed a more modest 19% growth during the same period. The influx of new farmers, many of whom are beginning their agricultural journey, paints a picture of a community eager to cultivate the land and contribute to the local food system.

This growth, however, comes with its own set of challenges. Despite the increasing number of producers, the Rogue Valley has seen a four percent decline in the number of acres in active agricultural production over the last ten years. The reasons for the decline are complex, ranging from water rights to shifting market conditions. One result is that while there are more farmers in the region, they are working on smaller plots of land—78% of the farms in the Rogue Valley are now under 50 acres, and more than half of the farms are less than 14 acres. This shift to smaller farm size is important to note because it creates a need for equipment and infrastructure suited to smaller scale production, as opposed to the large-scale commodity farming common throughout the United States. It may also redirect future farming to incorporate urban farming strategies, a necessary transition to maximize production utiliz-

ing small land plots. Also important to note is that despite the shifts to smaller farm size, the region's largest crop continues to be hay and forage, primarily grown on ranch lands.

Land access, due to a number of issues including dramatically increasing land values, remains a significant barrier to expanding operations as well as creating challenges for new farmers. A large percentage of current farmers in the Rogue Valley, many of whom are land rich and cash poor, are at or nearing retirement age. Finding ways to retain agricultural land in production while at the same time providing farmers with the funds they need and deserve to retire is a key issue throughout Oregon, along with finding ways to incentivize food production over cash crops if we wish to have a thriving local food system.

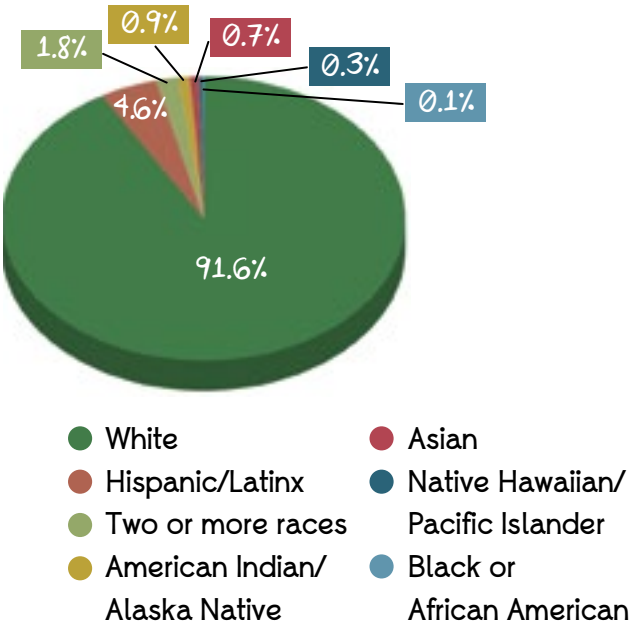
More acres are dedicated to hay and other forage production in the Rogue Valley than any other crop - by significant margins, with more than 22,000 acres in hay and forage production labor compared to just over 11,000 acres for all other crops combined. Because the Rogue Valley is blessed with a range of microclimates, high-value crops like grapes and pears thrive in our region. A burgeoning wine industry has flourished, putting the Rogue Valley on the map as a significant wine-producing region and bolstering the tourism industry. According to the 2022 Census of Ag, of the 11,000 acres not in forage production, 80 percent are in pear and grape production, with the production of grains and Christmas trees making up 13 percent of the acreage. Less than 3 percent of our region's total agricultural production (less than 1,000 acres) are used to produce food for individual consumption, farmers markets, sales to schools and restaurants. (See Top Crops and Sales Section below for acreage data in crops.)

Of particular note in the region is that Jackson County is one of only seven counties in the country, and the only one in Oregon, that has a GMO ban. In 2014, Jackson County voters opted to ban GMO production by a 66% margin. The ban was the result of a ballot initiative by farmers and citizens concerned about the impact of GMO pollen on the organic seed industry, raising awareness of the Rogue Valley and the benefits of growing in the region.

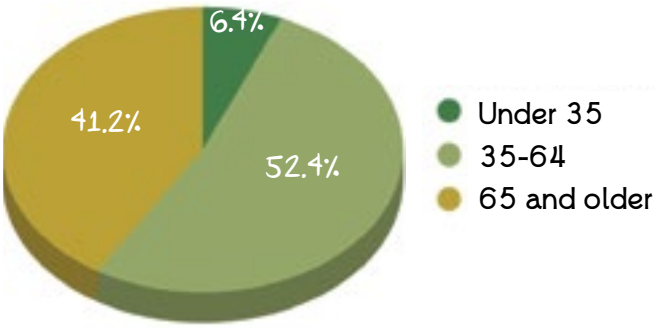
Economically, the Rogue Valley has made impressive strides in the last decade. Agricultural sales in the region have surged by 62% since 2017, far outpacing the statewide growth rate of 35%. This rapid increase highlights the hard work and innovation of local farmers who are finding ways to maximize their output and contribute more significantly to the regional economy. The growth and transition to diversify agricultural products remains a large opportunity and is a testament to the adaptability of local farmers who are making the most of the land they have.

Labor shortages, however, continue to be a persistent limiting factor for growth, with farmers struggling to find and afford the help they need to sustain or grow their farms and production. The challenge of securing reliable labor is compounded by the region's other pressing concerns: drought and wildfires. As the climate becomes increasingly unpredictable, the Rogue Valley has faced severe drought conditions that strain water resources and make it harder for farmers to irrigate their crops and maintain livestock. Water, once abundant, has become a precious commodity, and the need to conserve and manage it wisely has never been more critical.

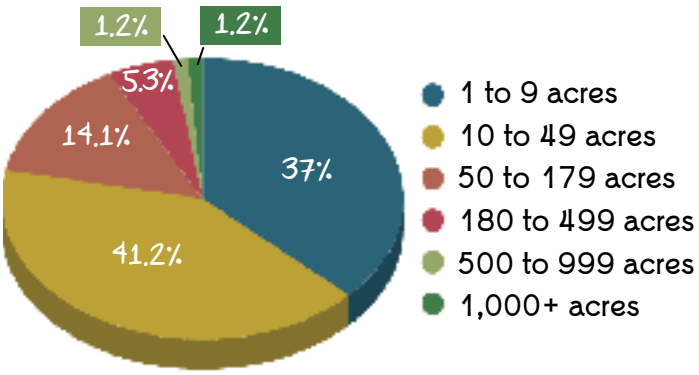
Farm Labor Demographics by Race (2022)



Farm Labor Demographics by Age (2022)



Breakdown of Rogue Valley Farm Sizes (2022)



Source: United States Department of Agriculture. 2022 Census by State - Oregon | 2022 Census of Agriculture

Wildfires in particular have cast a long shadow over the Rogue Valley. In recent years, the region has been hit hard by devastating fires that not only threaten crops and livestock but also disrupt the entire agricultural ecosystem. Smoke from these fires can damage crops like grapes, reducing their quality and market value. The long-term health risks to farmworkers, combined with the emotional strain on farmers who see their life's work, or their one and only home, threatened by forces beyond their control, have significant consequences. Both the physical and mental toll on those who rely on agriculture for their livelihoods cannot be overstated. This reality was made especially apparent in 2020, when on September 8th, the Alameda Fire swept through the region, destroying more than 2600 homes, many of which were the homes of farmworker families. Numerous families were forced to leave the area, labor shortage challenges were exacerbated and the mental strain on farmers, farm workers and the community at large was tremendous.

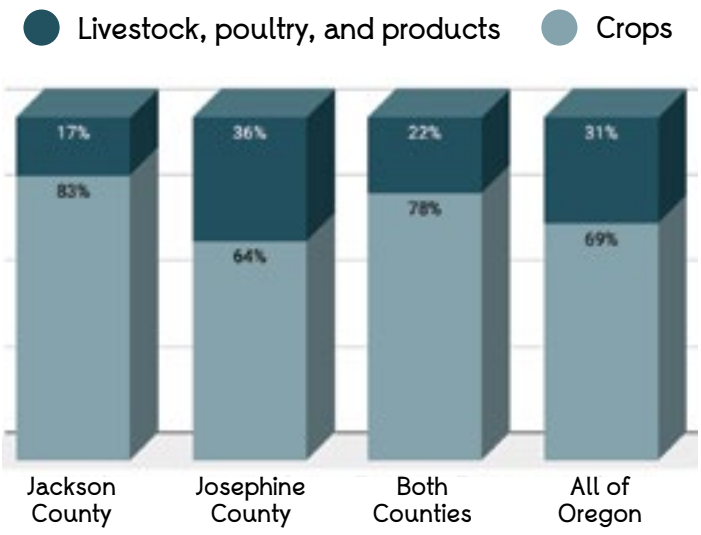
The story of agriculture in the Rogue Valley is one of contrasts—a region with a booming number of small farms but shrinking land; a place where agricultural sales are rising rapidly, yet the challenges of land, labor, drought, and wildfires cast a long shadow. This narrative of growth amidst constraint reflects the broader dynamics at play in Oregon's agricultural landscape, but with a distinctly local flavor that underscores the resilience and ingenuity of the Rogue Valley's farming community.

For generations, Indigenous peoples practiced traditional ecological knowledge, cultivating and stewarding the land in harmony with nature. Later, settlers introduced extensive irrigation infrastructure—an intricate system of aqueducts, ditches, and dams—reshaping the land and fueling the agricultural economy. While these systems allowed farming to flourish, they also left a lasting environmental impact, contributing to water scarcity and ecosystem disruption. Here, farming is not just an occupation; it's a way of life that continues to evolve, adapt, and thrive, even in the face of significant challenges. Both the land and those who work it carry the weight of this complex history, as farmers and farmworkers navigate the pressures of a destabilized climate, labor shortages, and a legacy of human intervention on the landscape.

Key Findings:

- Labor is a critical limiting factor in increasing local production.
- Access to land is limiting the expansion of current enterprises and the growth of additional farms.
- The number of producers in the Rogue Valley is growing at twice the pace of anywhere else in Oregon and agricultural sales have more than doubled in the last seven years.
- Most farms in the Rogue Valley are less than 50 acres and 50 percent of the farms are smaller than 14 acres.
- Although there is an influx of farmers, arable land under production has decreased by 4% creating a situation of much smaller farms and limited access and a potential challenge in expanding scale.
- Food crops (vegetable and fruits grown primarily for local consumption, not export) represent less than 8% of the total agricultural production in the Rogue Valley, with grass and forage production utilizing nearly 50% of the land. Wine and pear production are next in line.
- There is a need, in the face of changing weather patterns, increased and prolonged periods of intense heat and drought, pests and wildfires, to develop regional programs that can help mitigate the increasing risk farmers are facing.

Share of Agricultural Sales by Type



1.2 Sector Facts

Agriculture in Oregon

- Agriculture is the second largest sector of Oregon's economy contributing directly and indirectly to

By the Numbers:
Agriculture in the Rogue Valley

5,910

the total number of producers, representing **8%** of all Oregon producers.

3,001

farms and ranches equating to **233,427** acres in production (or **2%** of Oregon's agricultural acreage).

50%

the increase in producers since 2012. By contrast, the number of producers across the entire state increased by only **19%** during that same time frame.

40% or 2,364

the number of producers who rely on farming as their primary source of income, while the remaining **3,546** work additional jobs to make a living.

$12.1 billion in taxes, $29.7 billion in wages and over 680,000 jobs.[1]

- In Oregon, agriculture makes up 13% of the state's gross product and results in $5.01 billion in agricultural production. In 2021, there were $2.57 billion in agricultural exports.[2]

Agriculture in the Rogue Valley

- The Rogue Valley has 5,910 producers which represents 8% of all Oregon producers.[3]
- The Rogue Valley is home to 3,001 farms and ranches which equates to 233,427 acres in production (2% of Oregon's agricultural acreage).[4]
- The region has seen a large increase in the number of producers since 2012. The Rogue Valley has 50% more producers than it had in 2012. By contrast, the number of producers across the entire state increased by only 19% during that same time frame.[5]
- Of the 5,910 farmers, 40% rely on farming as their primary source of income, while the remaining 60% must work additional jobs to make a living.[6]

Producer demographics

- Most producers in the region are white (92%). This is in line with the statewide trend.[7]
- 8-9% of producers identify as black, Latinx, native, or non-white.[8]
- The average producer age is 59. This is in line with the statewide trend.
- 40% of all the producers in the region are new and beginning farmers.[9]

Farm Number, Size and Acreage

In the last decade (2012-2022), the Rogue Valley has seen:[10,11]

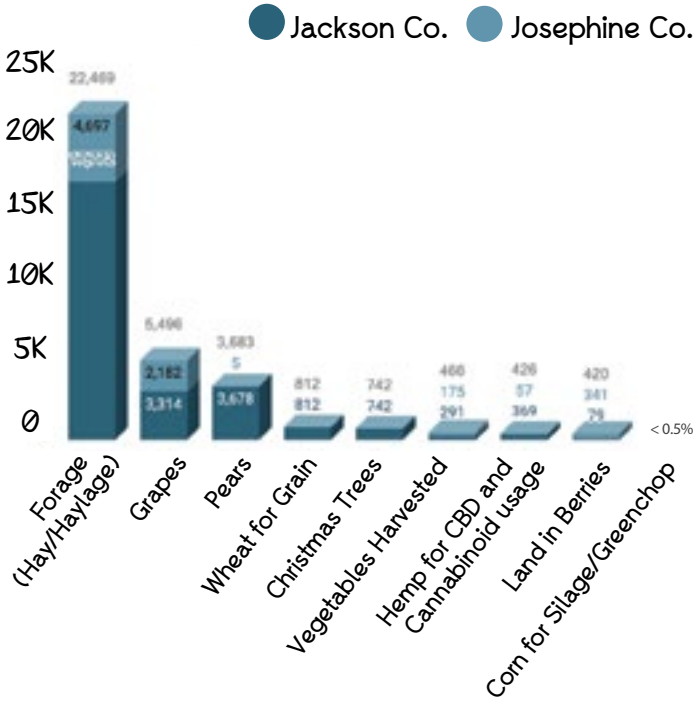
- An increase in the number of farms by 28%.
- A net loss of 8,908 acres in agricultural land which amounts to -4% change. Individually, Jackson County lost 5% of farmland while Josephine County's farmland increased by 8%.
- 78% of all Rogue Valley farms are smaller than 50 acres in size.
- The average farm size for Jackson County has decreased by 31% down to 85 acres while Josephine County's has increased to 51 acres, up by 11%.

Top Crops and Sales

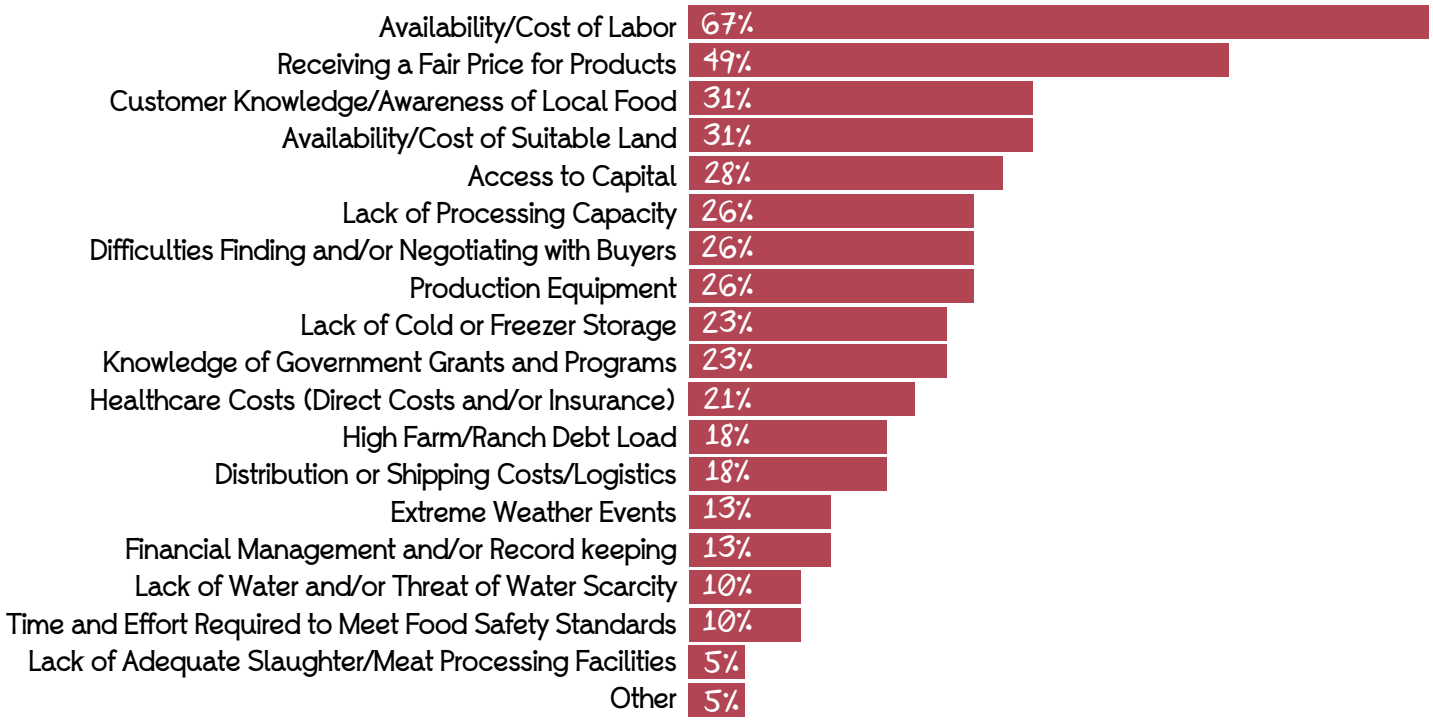
Agricultural sales in the Rogue Valley total $143,760,000 which is 2.1% of Oregon's agricultural sales.[12]

- Crops make up the majority of agricultural sales in the region (Crops - 78% | Livestock, poultry, and product sales - 22%)[13]

Top Crops in the Rogue Valley by Acreage (2022)

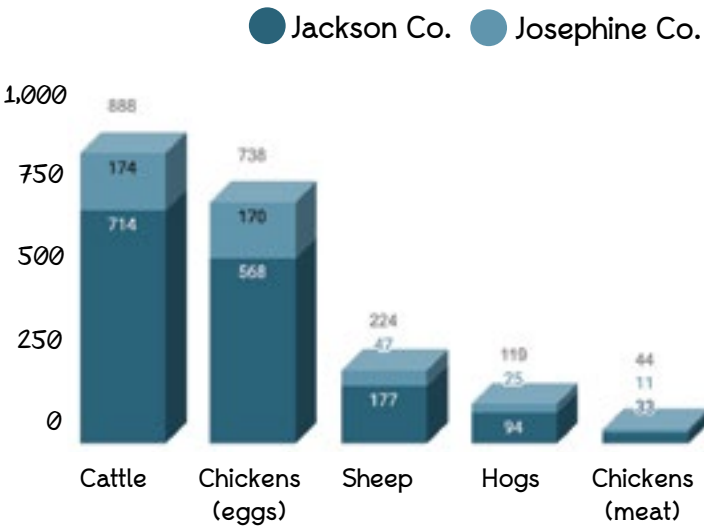


Top Barriers or Concerns that Farmers Face



- The top eight crops across the region (by acreage) are:[14] ***See graph.***
  - Forage (hay/haylage) - 22,469 acres
  - Grapes - 5,496 acres
  - Pears - 3,683 acres
  - Wheat for grain - 812 acres
  - Christmas trees - 742 acres
  - Vegetables harvested - 466 acres
  - Berries - 420 acres

Livestock Farms by Type in the Rogue Valley (2022)



- The number of livestock & poultry farms by animal type across the region:[15] ***See graph.***
  - Cattle and calves - 888
  - Hogs and pigs - 119
  - Sheep and lambs - 224
  - Layers (eggs) - 738
  - Broilers or Meat Poultry - 44

Agricultural sales in the region have increased by 62% since 2017. This is at a much greater rate than the state-wide trend which has gone up by 35%. (JaCo: 48%; JoCo: 120%; State: 35%)[16]

Production Practices

Of the 3,001 farms in the Rogue Valley:

- 58 are USDA Certified Organic (2% of JaJo farms)[17]
- 491 practice rotational or management-intensive grazing (16% of JaJo farms)[18]
- Only three farms in Jackson County are USDA Good Agricultural Practices (GAP) & Good Handling Practices (GHP) certified (out of 167 GAP certified in the entire State)[19]
  - Shasta View Inc. - (Harmonized GAP Plus+) (Ashland, OR)
  - Vaughn Farm and Orchard LLC (Central Point, OR)
  - Ella Bella Farm, LLC (Talent, OR)

Cannabis and Hemp by the Numbers

- As of 2023, there are a total of 76 hemp farms covering 797 acres in the Rogue Valley.[20]
- In Josephine County there are 946 Cannabis growers with over 12 plants covering 753 acres. 82% of Cannabis growers are unlicensed.[21]
- In 2021, the water usage required to irrigate cannabis and hemp was 505 million gallons.[22]

1.3 Survey and Focus Group Findings

Farmer Survey 2024

There were 80 farmers and ranchers from across the region who responded to the Rogue Valley Farmer/Rancher survey.

Top Challenges

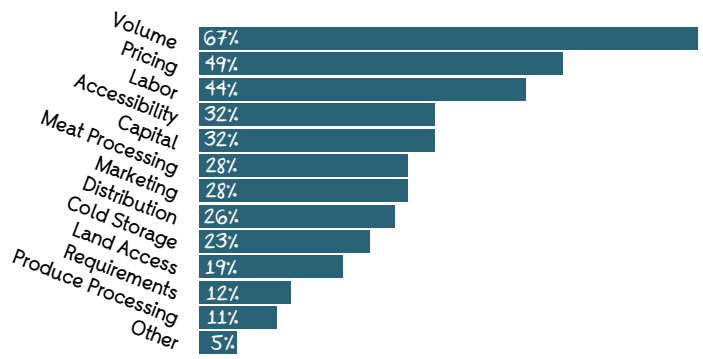
- Top barriers farmers face: 67% of respondents reported availability/cost of labor as their top challenge for their farm. This was followed by receiving a fair price for products (49%), Customer knowledge/awareness (31%), Land availability (31%), Access to Capital (28%) and lack of processing capacity (28%).
- Challenges accessing wholesale markets: 67% of respondents reported volume/having enough product to fill orders as a top barrier to accessing wholesale markets. This was followed by Pricing, Labor, Accessibility, and Capital. ***See graph.***

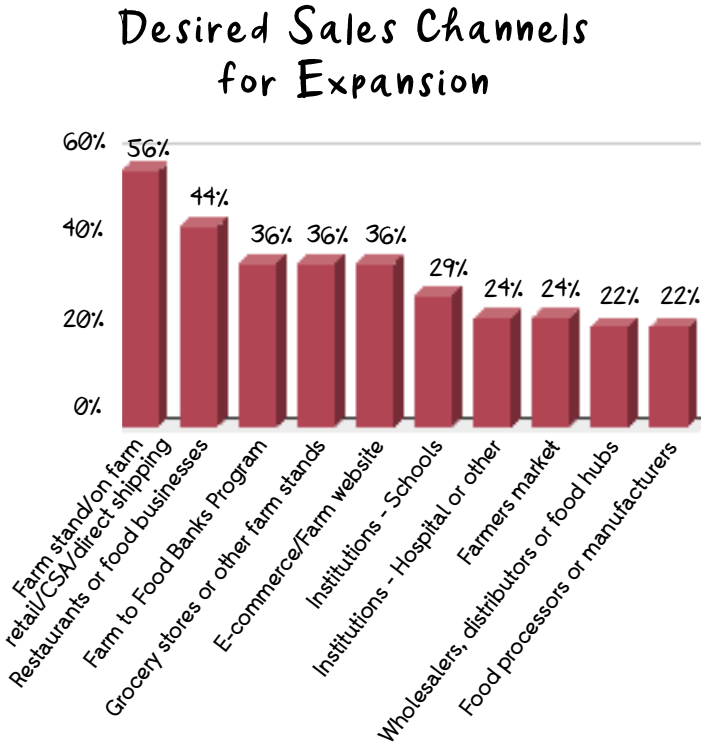
Farm Infrastructure

- Distribution: 78% of respondents reported using only their personal vehicle to transport their products. 40% reported wanting a food hub to handle aggregation in order to scale their business.
- Storage Infrastructure: 63% of respondents reported having an on farm refrigerator or freezer however 44% reported needing more on farm storage in order to scale their business. 15% reported having no storage infrastructure whatsoever.

Land Access and Farm Viability

- Succession plans: 39% of the 80 respondents said they don't have a succession plan for their farm.
- Need for additional land: 32% of respondents reported a need for additional land and reported their top challenges to accessing land was cost/capital and land availability.





Sales and Business Goals

- Current sales channels: Most farmers report selling directly to consumers through farm stands, farmers markets and CSA's. Twenty-two farmers report selling to restaurants, 18 sell online, and 17 reported selling to grocery stores.
- Desired sales channels for expansion: Farmers reported high interest in expanding their direct to consumer sales channels (farm stands, CSAs) but also restaurants and the Farm to Food Banks Program, Grocery stores, and e-commerce sales. Institutions like hospitals and schools were also of interest. ***See graph.***
- Desire to scale and expand production: 54% of farmers said they were interested in scaling up their business. 47% of farmers said they were interested in devoting additional acreage to fresh fruit and vegetable production if there was a market for their product (An additional 13% said they would but they didn't have the acreage).
- Where farmers get their information: 75% of farmers get information about their business from other farms. 52% said the internet and 46% said OSU Extension.

2023 Food Summit Roundtable: Production

- Farmers report meat processing, land access, and a lack of farm infrastructure is a challenge in the region. Distribution bottlenecks and a need for labor to support infrastructure was also cited.
- Need for more farmer education and technical assistance: risk management, calculating costs (dollar per day which factors how much time a crop is tying up the soil space compared to its crop profitability), marketing, post-harvest handling, food safety, business licensing, permitting specific to our county, ag-specific accounting and tax prep, and production equipment demonstrations to improve efficiencies, how to scale from market garden to wholesale, business plan development.
- Need a lending library of small farm equipment to share between farms, with a maintenance plan and trailer for transportation between farms. JSWCD has some equipment. Josephine County has non progarm of this type.
- Opportunities include: exploring shared use infrastructure, grant writing technical assistance, Regional market development, workforce development, and increased networking/communication among partners.

2020-21 Community Meetings through FEAST

The FEAST (Food, Education, Agriculture, Solutions Together) initiative funded four community projects in 2021

- EBT at Williams Farmers Market
- Plant-a-Row, Rogue Gardeners
- Native Women Share
- Spiral Living Center Gleaning Project

One of the additional outcomes from the FEAST project was to highlight the "need to continue to foster relationships and identify leaders as they emerge" in addition to strategically aligning efforts across the region – it was during this process that a regional food system assessment was proposed.

1.4 Trends and Challenges

The combination of unique factors in the Rogue Valley—such as smaller farm sizes, water scarcity, labor shortages, and the growing threat of wildfires—presents distinct challenges that set our regional food system apart from other areas in the state. While these challenges are significant, they also create opportunities for innovation and resilience that are specific to our local agricultural landscape.

- The Rogue Valley is seeing extraordinary growth in the small farm sector with a large increase in the number of producers in the last decade. This bucks both statewide and national trends.
- However, the number of acres in production is decreasing, despite the increase in farmers. This means more farmers are farming fewer acres as land is being taken out of production.
- Land access, availability and affordability is a major constraint to new and beginning farmers in addition to farmers who lease land.
- Labor availability and affordability is also a major challenge for farmers and ranchers in the region.
- Small farmers and ranchers are interested in expanding their production to reach more diverse markets like grocery stores and institutions. Many small to mid sized farm businesses are interested in growth and expansion.

- The boom and near bust of the cannabis and hemp industries in the region have left concerns about the use of land and water resources and the impact of the industry on the food system, including post boom use of infrastructure and land.
- Shared-use infrastructure like distribution vehicles, processing facilities, and equipment is of interest and would benefit small to mid sized producers in the Rogue Valley.
- The closure of the Josephine County OSU Extension Service in July 2024, leaves a tremendous void in an area which is exhibiting exponential growth. All resources for Master Gardeners, Small Farm Development, 4-H, Plant Clinics, SNAP/Family Services and Farm to School programming have been discontinued indefinitely which is a major loss to the community and poses a significant threat to education, food access and technical assistance resources to the region.
- The need for rural and producer financial support far outstrips available funding, despite increases in grant programs . Most recently, for example, $33 million in requests were submitted for a $5 million pool via the Resilient Food Systems Infrastructure program. This speaks to a desire of producers to increase production because they see demand for their products, but lack the financial resources to build the infrastructure needed.

1.5 Merits Further Investigation

- Current Agricultural Land Usage by acre and crop
- Fallow Agriculture Land/EFU acres and location
- Cannabis and hemp production land use, zoning and resource consumption
- Mapping of irrigated vs non irrigated EFU land along with soil type
- Indigenous Food Sovereignty, Production and Challenges

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22 Ibid.

Community Highlight: Heritage Grain Project

Fry Family Farm, Hardy Seeds, Feral Farms, Verdant Phoenix

Since its inception in 2019, the Rogue Valley Heritage Grain Project (RVHGP) has been increasing local access to more than 100 rare heritage grain varieties. The Rogue Valley Heritage Grain Project's mission is to increase local access to seeds of climate resilient, culturally significant food staples through grower participation and community education throughout the Southern Oregon and Northern California bioregion. Through partnerships with the Rocky Mountain Seed Alliance, Southern Oregon Seed Growers Association, and local growers, the project has expanded its seed trials and cultivation efforts every year, identifying varieties that thrive under extreme climate conditions without supplemental irrigation or fertilizer. However, heritage grain seeds are incredibly scarce, making it difficult for farmers to find enough to plant. The scarcity is due to the modernization and privatization of seed varieties over the past century, leaving heritage varieties in such low supply that they are nearly impossible to source in meaningful quantities.

The RVHGP has grown into one of the most diverse living seed banks in the Western U.S., with over 30 growers cultivating 75+ acres of heritage grains and legumes. The project supports food security, regenerative agriculture, and climate resilience in Southern Oregon and Northern California, while engaging local communities through education and events like Heritage Grain Day, where growers, bakers, and food processors celebrate the diversity and nutritional density of these grains. This project has resulted in more local makers and food processors pledging their commitment to purchasing local grain and legumes from growers to use in their baking. Now, heritage grains are being included in Jackson and Josephine County school lunch programs and supported by Rogue Valley Farm to School's tasting tables.

FRY FAMILY FARM
Certified Organic

Verdant Phoenix

Hardy Seeds
Non-GMO, Open Pollinated
Bioregionally Adapted Seeds

Community Highlight: Josephine County Farm Collective

During the pandemic, a small group of farmers began to work collaboratively to share resources in an effort to feed our communities with locally produced food when major gaps formed in the traditional food supply system. Between 2020 and 2022, customer and producer participation doubled annually demanding the healthy and nutritious foods grown from our local producers while reinvesting in our local economy.

We realized quickly that a resilient local food system network was essential, so in 2023, we formally founded the Josephine County Farm Collective as a nonprofit 501(c)3 organization. Our mission is to increase access to locally produced agricultural products while supporting the economic development needs of our producers with resources and educational programs.

Our work continues with significant capacity growth in 2024; building the infrastructure for food distribution, added value processing, and educational programs for the community that connect locally grown foods to healthy cooking, preservation and home gardening skill building. We are the resource Josephine County needs now more than ever.

–Carrie Juchau, Founder and Executive Director

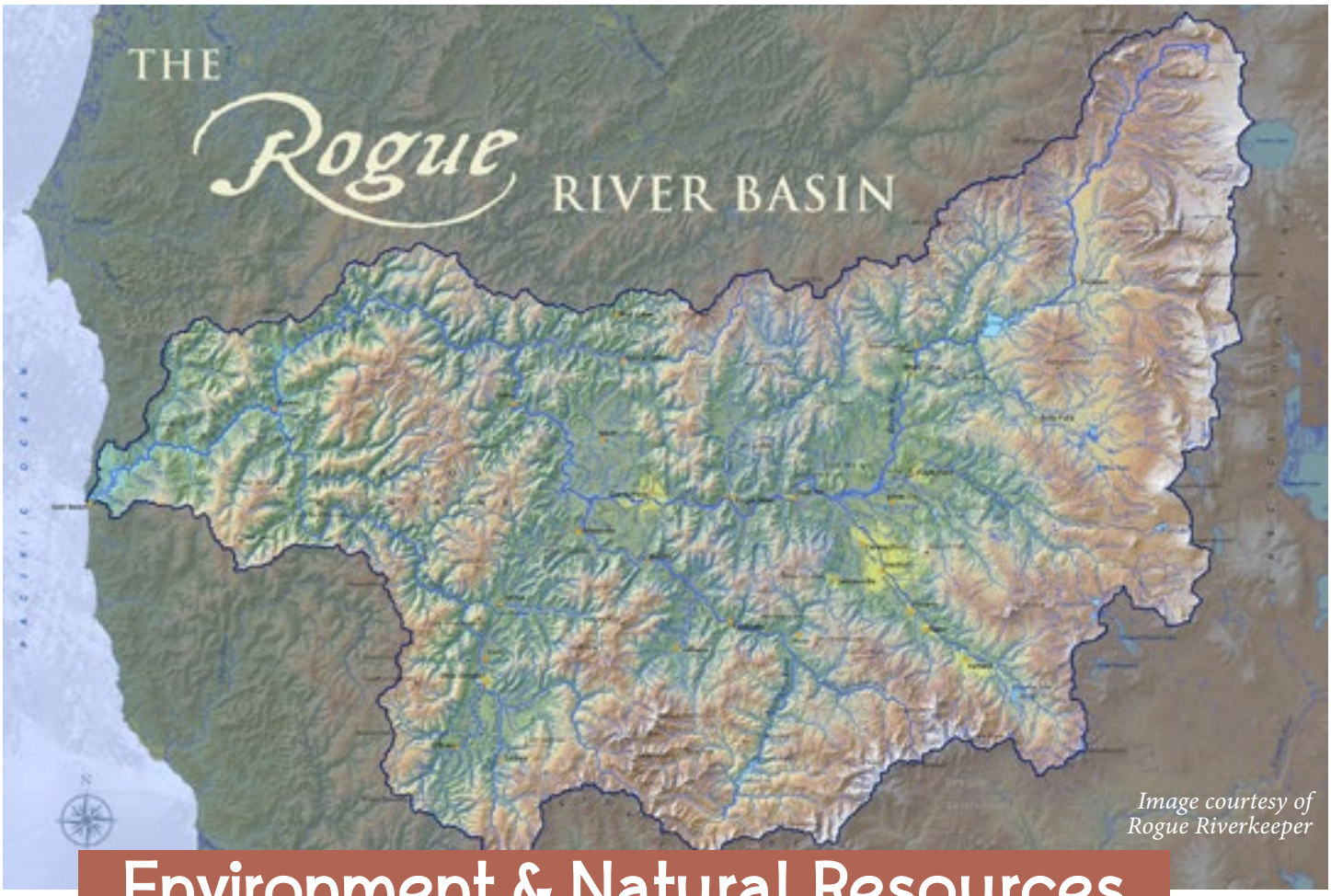


Image courtesy of Rogue Riverkeeper

Environment & Natural Resources

2.1 Overview of the Impact of Natural Resources Management and Ecosystem Health in the Rogue Valley

One of the original eight rivers named in the Wild and Scenic Rivers Act of 1968, the Rogue River has been known for its incredible beauty and impressive salmon runs. Historically, the Rogue River watershed has been one of enormous abundance – abundant salmon runs, oak forests, meadows of camus, elk, deer, rushing rivers, hazel, berries, and much more. The advent of agricultural production in the region brought changes to the natural landscape, including a matrix of irrigation ditches and dams built over forty years, beginning in 1920. This, along with many other factors, not only had an impact on water available for agricultural production, it also impacted salmon habitat and the many communities that relied on the wild and indigenous foods for nourishment. Today, the interconnected web of water, land, wildlife, and agriculture continues to feel the impact of management decisions made 100 years ago. Indigenous foodways, local agricultural production, and sustainable natural resource management are all foundational components identified in the 2024 Rogue Valley Community Food Assessment as critical to the future of a thriving and resilient food system.

Food production in the Rogue Valley, like anywhere, relies upon, and impacts, the health of the local ecosystem and availability of natural resources. Agriculture also impacts water resources, wildlife habitats, and biodiversity. Because of its significant impacts on the natural environment, communities are prioritizing more ecologically sustainable means of food production. In the Rogue Valley there is a strong interest in developing, supporting and maintaining ecologically sound agricultural practices, with 76 percent of the producers surveyed for the Rogue Valley Community Food Assessment stating that they implement some form of regenerative farming or ranching practices. Of those that said they do not use regenerative practices,

most were either unsure as to what defined regenerative or needed more technical or financial assistance implementing better practices.

Restoring the health of the ecosystem, to benefit both people and wildlife, is increasingly being viewed as vital to the long term economic prosperity of the region. 76 percent of the survey respondents acknowledged they were either very or extremely concerned about the impact of environmental changes on the food system, with an additional 24 percent moderately concerned. Government agencies have prioritized supporting farmers and ranchers in implementing more restorative practices, both by providing important technical assistance as well as funding via grants and other incentive programs. During the 2023 Oregon Legislative Session, $2.65 million was allocated to the Oregon Community Food Systems Network (OCFSN) for the Farmer and Rancher Disaster Resilience Grant Program. Oregon Farmers Markets Association (OFMA) was awarded $2 million to support farmers markets in mitigating the impacts of drought and related natural disasters. This funding supports small and underserved producers in Oregon, enhancing their resilience to climate impacts such as heat, smoke, and drought.

> "Indigenous foodways, local agricultural production, and sustainable natural resource management are all foundational components identified in the 2024 Rogue Valley Community Food Assessment as critical to the future of a thriving and resilient food system."

One significant setback to note is the closure of the OSU Extension Service in Josephine County in 2024, which has created a tremendous hurdle for producers in that county to access critical programs such as the 4-H Youth Development, Master Gardener, Master Food Preserver, Agriculture and Forestry, and Family and Community Health programs. These initiatives provided invaluable opportunities for farmers, ranchers, and community members to learn from each other and external experts about sustainable ways to manage land, water, and crops for future generations. Without these resources, producers face greater challenges adapting to changing environmental and economic conditions. At the time of writing this assessment, several community organizations are working, with overwhelming public support, toward solutions to meet the gaps left in the wake of the closure.

Community members have also played an important role in supporting farmers implementing organic and other more ecologically sound practices by "voting with their dollars" and purchasing produce via local growers markets and CSA programs. Farmer direct sales generated more than $12 million in sales in 2022, or 8.6 percent of total agricultural sales in the region. This direct support has become even more critical in light of the closure of the OSU Extension Service in Josephine County, as it helps fill some of the gaps in resources and connections that producers now face.

The demand for land to be used for housing and development has a significant impact on agricultural lands, open spaces, and wildlands. Oregon's land-use protections are among the strongest in the nation, yet the state continues to lose farmland every year, highlighting the complexity of balancing growth and preservation. This loss stems from both low-density development, which removes farmland from production even while the agricultural zoning stays in place, and urbanization pressures, which gradually encroach on agricultural lands. According to the American Farmland Trust, Jackson County faces some of the highest pressure in the state, with projections indicating the loss of approximately 13,700 acres of farmland to development by 2040. This underscores the urgent need for coordinated efforts among diverse stakeholders—including land-use planners, local governments, agricultural producers, conservation organizations, and community advocates—to address the challenges of protecting farmland while managing development pressures and ensuring the region's agricultural resilience.

The capacity of the region to increase food production is heavily dependent upon the availability of natural resources, particularly water. Water availability is tied not only to management and agricultural use but also to forest management practices and wildlife habitat preservation. Research has shown that the extensive dam systems beavers produce to make their homes work as

a key water storage system that helps to increase vegetation and improve rainfall. The disappearance of beaver and beaver habitat has been associated with reduced water availability. The Rogue Valley's extensive forests also play a key role in retaining water by capturing and releasing water into the system. Forest management for fire, therefore, can play a role in managing water availability as well.

Building a robust and resilient regional food system requires sustainable management of water, land, forests, and other limited resources. In the Rogue Valley, where droughts, reduced snowpack, and complex water rights increasingly challenge agricultural production, water management is critical to ensuring farmers can grow and expand their operations. Strengthening the Rogue Valley's food system while preserving and restoring its natural resources requires convening and connecting a diverse range of stakeholders, including the Forest Service, Bureau of Land Management (BLM), private landowners, agricultural producers, local governments, and Indigenous communities. This collaboration emphasizes the complexity of the interconnected systems that govern water, land, and wildlife, where decisions made in one domain often ripple across others. By fostering communication and cooperation among these diverse groups, the region can work toward shared goals of resilience and sustainability, addressing the multifaceted challenges of managing natural resources in harmony with ecological and human needs.

> "Oregon's land-use protections are among the strongest in the nation, yet the state continues to lose farmland every year, highlighting the complexity of balancing growth and preservation."

Key Findings

- The climate in the Rogue Valley is predicted to be warmer, drier and more variable, with fifteen degrees Fahrenheit warmer record temperatures recorded in 2024 than in any year prior. Based on temperature data, it is mirroring historical trends of the southern Central Valley of California in the summer and the Sacramento area in the winter. This shift will impact the crops that can grow in this area, the prevalence of pests, water availability, and production capacity as the growing season lengthens and freezing diminishes. It also impacts the working conditions for farm laborers as long and intense heat waves and smoky summers become more frequent.
- Water management continues to be a pivotal issue, with a strong need for coordination between urban and agricultural water management as well as a need to improve and incentivize better water conservation practices and infrastructure.
- Wildfires impact food production, labor, harvesting conditions, housing, and the quality of key products such as wine. There is a need for risk management in the form of crop and infrastructure insurance (outside the usual USDA and business insurance programs) in order to protect local farm viability and promote biodiversity.
- Indigenous foods such as salmon, acorns, camas, game animals, and berries were historically plentiful in the Rogue Valley. Managing resources and partnering with Indigenous leaders and communities to support their vision of restoring indigenous foodways is an important part of natural resource management in the region and fundamental to creating a resilient, thriving, equitable food system.
- Seventy-six percent of the producers surveyed for the Rogue Valley Community Food Assessment said that they use some form of regenerative farming or ranching practices. Technical and financial assistance were listed as the primary needs in more producers implementing regenerative practices.
- **The utilization of prime farmland to meet housing and other development needs is putting food production at risk. Despite Oregon having strong exclusive farm use (EFU) protections in place, Jackson County currently has the potential to be one of the three hardest hit counties in Oregon, with 13,700 acres at risk for development by 2040.**
- Oregon's "use it or lose it" water rights law requires rights holders to demonstrate beneficial use of their allocated water at least once every five years or risk forfeiting their rights. While intended to prevent waste and ensure efficient water use, this principle can unintentionally lead to overuse, as rights holders may feel compelled to use their full allocation even when it's unnecessary. This practice can ex-

acerbate water scarcity, especially during droughts or in regions with competing demands from agriculture, urban development, and environmental preservation. To address this challenge, modernizing water rights to include flexibility for conservation—allowing temporary non-use without penalty—could help balance the need for resource sustainability with fair access for all users.

2.2 Sector Facts

The Impact of a Changing Climate: The Rogue Valley, like much of Southwest Oregon and the state as a whole, will experience adverse conditions from the impacts of a changing climate. In general, Southwest Oregon and the Rogue Valley region will experience the following impacts from a changing climate:[1]

- Increased warming in all seasons, with the greatest amount of warming projected in summer (+9.4°F) and the least amount of warming in spring (+6.3°F). With this increase in the City of Medford, summer conditions would be similar to those currently observed in Bakersfield, California, located over 497 miles (800 kilometers) to the southeast. The average increase of 5.5°F in winter would make the winter climate of Medford like that currently observed in Sacramento, California.
- Longer, more frequent and more intense heat waves with an increased number of extreme heat days (>90°F), thus threatening the well-being of various vulnerable workers and residents.
- A longer growing season is expected, which may increase crop productivity in some areas, but also increase potential for disturbances from insects, pathogens and invasive plants.
- [2]A decrease in the number of freezing days and nights with a possibility of few to no freezing days by 2100.
- Precipitation arriving as rain instead of snow will result in earlier spring runoff, flashier river systems, flooding, less groundwater recharge, less snowpack, and glacial retreat, in turn contributing to summer water shortages and changes in irrigation needs, increased in-stream water temperatures, and lost recreational opportunities.
- Increase in summer wildfire risk due to a longer dry season and stress brought about by drought, pests, and pathogens, in turn causing increased occurrence of air pollution events, floods, and destructive landslides.

The Impact of Wildfires:

- Over the past several decades, a number of large mixed-severity fires have occurred in the Rogue Valley. In the 2022 fire season, 27% of the State of Oregon's fires occurred in The Rogue Valley (241 wildfires that burned approximately 21,731 acres between both Jackson and Josephine counties).[3]
- Two notable 2020 wildfire events in Jackson County include the Almeda and the South Obenchain fires. The Almeda Fire resulted in 3,200 acres burned and 2,600 structures lost and the South Obenchain Fire resulted in 32,671 acres burned and 80 structures lost.[4]
- The 2022 wildfire season impacted southwest Ore-

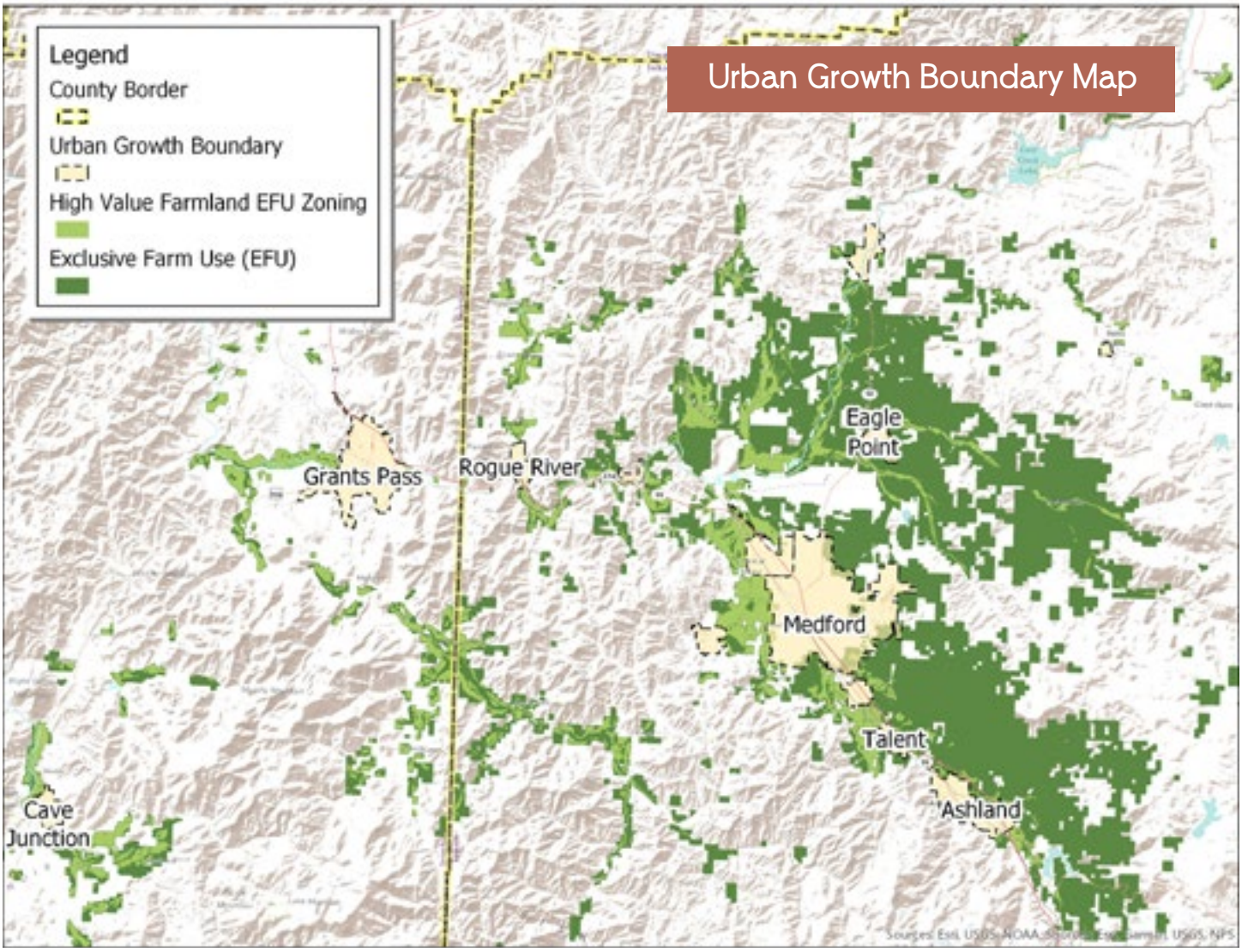
gon with the Rum Creek Fire in Josephine County, burning 21,000 acres near Grants Pass. The McKinney Fire occurred south of the Oregon border in Siskiyou County, California, but the smoke impacted southwest Oregon communities such as Medford, Grants Pass, and Cave Junction.[5]

> "This collaboration emphasizes the complexity of the interconnected systems that govern water, land, and wildlife, where decisions made in one domain often ripple across others. By fostering communication and cooperation among these diverse groups, the region can work toward shared goals of resilience and sustainability, addressing the multifaceted challenges of managing natural resources in harmony with ecological and human needs."

- Potential for damage by fire:[6]
  - Of the surveyed land across the two counties
    - **83 percent (2,186,699 acres)** has a Low risk of fire damage
    - **11 percent (277,103 acres)** has a High risk of fire damage
    - **6 percent (145,915 acres)** has a Moderate risk of fire damage
    - **1 percent (24,605 acres)** is either not rated or considered null

The Impact on Water Resources and Availability:[7]

- Water challenges
  - There is reduced water availability in the three reservoirs (Howard Prairie, Hyatt Lake, and Emigrant Lake) that make up the primary water supply for the Rogue Valley; these are old Beaver wetlands, deriving originally from the Klamath Watershed. The combined reservoir water levels for each year between 2019 and 2023 have been approximately half or less of the average water supply over the same period. (ranging from as low as 10% capacity in 2022 to 41% capacity in 2020).[8]
  - The reservoirs are impacted by increased temperatures, reduced snowfall, and melting snowpack. There are additional impacts from reduced water availability from headwaters to the mouth of the Rogue River.
- Water Use and Availability
  - **Availability factors:** The availability of water is influenced by several key factors, including water diversion from the Klamath Basin; persistent drought conditions; rising temperatures; declining beaver populations, which play a critical role in water retention; irrigation practices; and the health of the soil, which affects water absorption and storage.
  - **Use factors:** Water use is driven by a growing population that increases residential water demand, existing water rights that allocate resources, and various economic activities such as tourism, restaurants, agriculture, and cannabis production.
    - Oregon's water laws—based on the principle of "first in time, first in right"—prioritize water access for those with older rights, which can limit flexibility in allocating resources during droughts and periods of scarcity.
    - Illegal water use by cannabis growers: The legalization of cannabis has been perceived to have had a significant impact on water use. The actual impact has been difficult to track because water draws may be illegal, grows may be illegal, and the lack of government resources to enforce water use rights has caused many farmers to dismiss the new industry.
    - **It was estimated in 2022 that 505 million gallons of water is used to cultivate hemp and cannabis in Josephine County alone.**[9]
  - Water quality challenges impacting marginalized communities (i.e., people of color, low-income communities) are pronounced in five Oregon counties, one of which is Jackson County.[10]
- Exclusive Farm Use (EFU):[11] The purpose of EFU zoning is to conserve agricultural lands. American Farmland Trust estimates that roughly half of the farmland conversion in Oregon between 2001-2016 was due to low-density residential development, which can occur even while land remains under EFU zoning. EFU zoning allows for the de-



velopment of a variety of dwelling types on agricultural land. These dwelling types generally fall into two broad categories – those permitted for farm owners and farm workers, and those that are not associated with an active farm use on the property.

EFU Trends in the Rogue Valley:

- Between 1994-2019, the Rogue Valley region was granted the following number of EFU dwelling approvals by type:
  - EFU dwelling approvals on farmland: 891 (5% of State of Oregon approvals)
- American Farmland Trust projected farmland acreage conversion:[12]
  - In the "business as usual" scenario, development follows recent patterns; poorly planned development and low-density residential sprawl continue to rapidly convert farmland and ranchland; and 13,700 acres of farmland in the Rogue Valley is projected to be converted to both urban and highly developed (UHD) and low-density residential (LDR) by 2040. The acreage in these two counties is 17 percent of the farmland under threat of development conversion in the entire state of Oregon.
  - 74 percent of Jackson County's conversion is projected to occur on the state's best land
  - 65 percent of Josephine County's conversion is projected to occur on the state's best land
  - See American Farmland Trust Oregon Map
- Prime Farmland in the Rogue Valley:[13]
  - Of the farmland surveyed in the Rogue Valley, 656,573 acres of farmland (25% of the area of interest surveyed) are classified as either prime farmland, farmland of statewide importance, or prime farmland if irrigated or drained.
    - Jackson County hosts 69,633 acres of prime farmland (4% of total area surveyed) and 383,500 acres of farmland of statewide importance (24% of area surveyed). Another 26,090 acres have the potential to be

prime farmland if irrigated or drained, and 1,104,805 acres are not prime farmland (70% of area surveyed).
    - Josephine County hosts 30,911 acres of prime farmland (3% of total area surveyed) and 111,126 acres of farmland of statewide importance (11% of area surveyed). Another 35,277 acres have the potential to be prime farmland if irrigated or drained, and 872,981 acres are not prime farmland (83% of area surveyed).
    - Since Jackson County is one of the few counties in the United States where GMO production is illegal, the seeds produced in the Rogue Valley have a larger market share than in the past.
- Urban Growth Boundary ***(see map)***
- Farms Under Threat
    - *development2040.farmland.org*

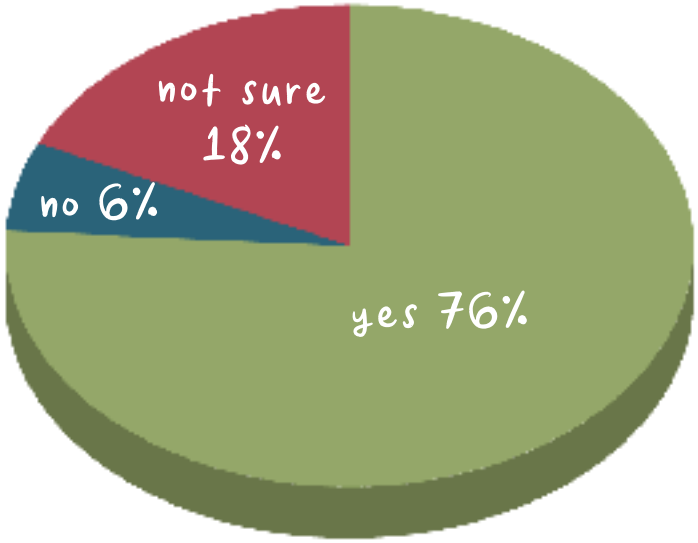
2.3 Survey and Focus Group Findings

2022 Water solutions summit:

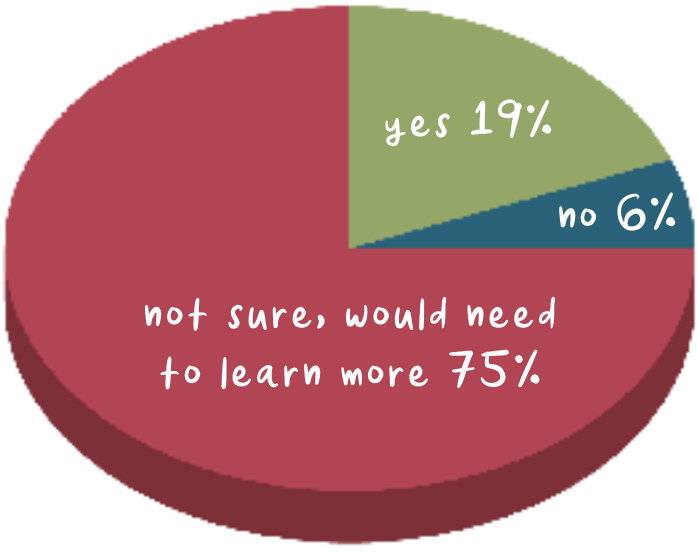
Eight breakout sessions on various aspects of water use and resource management and conservation. Highlights include:

- Incentivize and fund farmers to conserve and reduce water use through practices such as improving soil health, adopting no-till farming, engaging in carbon credit and sequestration programs, cover cropping, and participating in heritage grains projects.
    - A variety of grant programs are available to support these efforts. On-farm grants through JSWCD and NRCS can help farmers directly, while programs like the Allocation of Conserved Water program and the Bureau of Reclamation WaterSMART Grant focus on irrigation associations, districts, and conveyance improvements. Organizations like the Farmers Conservation Alliance have made significant strides with irrigation districts such as Talent Irrigation District (TID), Medford Irrigation District (MID), and Rogue River Irrigation District (RRVID). Notable success stories, such as the Three Sisters Irrigation District and the Deschutes River Conservancy, serve as strong models for potential improvements in our region.
    - Despite these incentives, financial barriers remain significant. In our region, available programs typically cover only 40–60 percent of the costs for increasing on-farm efficiency, leaving farmers to shoulder the remaining burden. Transitioning to more efficient irrigation systems, such as switching from flood irrigation to sprinkler or drip systems, improving flood irrigation, or installing tailwater catchment systems, remains financially challenging for many farmers, limiting the adoption of these practices.
- Water right system is complex. Existing legal sys-

Do you currently utilize any regenerative agriculture practices on your farm/ranch?



Are you interested in implementing regenerative agriculture techniques on your farm/ranch?

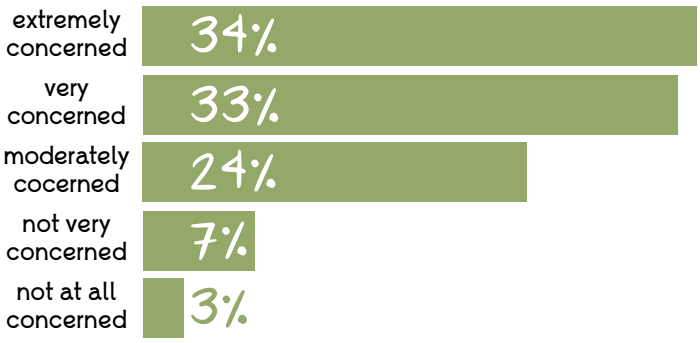


tem would be difficult to change.

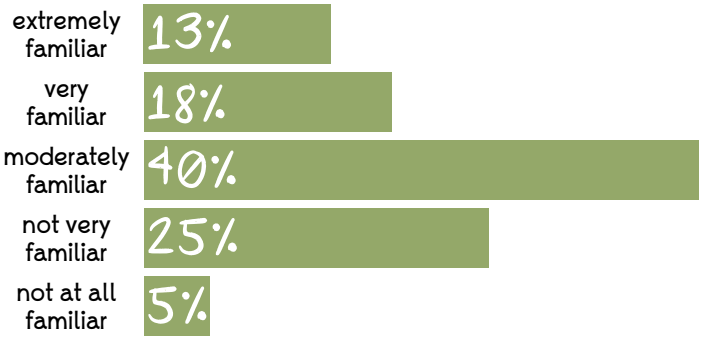
- "Oregon has had in-stream water rights since 1955, which are similar to irrigating a river or creek. These rights allow water to remain in-stream for purposes such as protecting fish habitats. Oregon also integrates groundwater and surface water rights, enabling a more comprehensive management approach."
- "People can apply for in-stream water rights through three agencies: the Department of Environmental Quality (DEQ), the Oregon Department of Fish and Wildlife (ODFW), and Oregon State Parks. However, new in-stream water rights are considered junior rights, which means they have lower priority compared to older irrigation rights. To address this, transferring older irrigation rights to in-stream rights retains their original priority status. One example of this was on the Little Applegate River, which flows into the Applegate River. Historically, an irrigation system known as the 'Farmer's Irrigation Ditch' diverted every last drop of water from the Little Applegate for out-of-stream use, utilizing all upstream rights. The farmers in this area converted their irrigation rights into in-stream rights, enabling the placement of pumps and access to a reservoir. This change restored water flow in the Little Applegate but resulted in more stringent regulations for farmers in the region. While the system and in-stream flow were successfully restored, the process created challenges for existing farmers, highlighting the complexities and trade-offs involved in water management. Not all participants were satisfied with the outcome."
- Incentivize backyard gardeners and non farmers to conserve water (example: swales)

2023 Report on what Oregon Farmers are doing to prevent drought: *https://storymaps.arcgis.com/stories/25fe209637ad451aa6d35f0d70b2ddca*

How concerned are you about the impact of environmental changes on your community's food system at some point in your lifetime? This may include factors such as extreme weather events, shifts in temperature patterns, wildfire and other climate-related influences.



To what extent are you familiar with or knowledgeable about agricultural practices aimed at reducing the environmental impact of farming?



Farmer Survey 2024 Results:

- Seventy-six percent of farmers surveyed said they utilize regenerative agriculture practices on their farm or ranch. Out of the sixteen farmers who said they don't utilize these practices or are unsure if they do, fifteen of them said they were interested in doing so or learning more about these techniques- strong indication of openness to a sustainable pivot in practices. ***See graph.***

RV Community Survey 2024 Results:

- Concern about environmental impacts: 66% (382) of community members said they were "extremely concerned" or "very concerned" about the impact of environmental changes on their community's food system in the future. ***See graph.***
- Knowledge of environmental practices in agriculture: Over one-third (180) of community members said they were "extremely familiar" or "very familiar" with agricultural practices that reduced the environmental impacts of farming. ***See graph.***
- Known ag practices to reduce environmental impact: Community members listed over forty unique agricultural practices to reduce environmental impacts.

2.4 Trends and Challenges

- Increased wildfires, flooding, heat waves and drought are expected in the future. However, community members of the Rogue Valley reported high education and awareness of many practices to reduce impact at the local level. Capitalizing on this community strength and education baseline may help implement more resilient and sustainable practices in the future.
- Water availability will remain a challenge unless water management stakeholders collaborate more effectively to ensure optimal use of resources and allow beavers to manage upland watersheds naturally, increasing water retention capacity.
- There is little existing prime farmland in the Rogue Valley and if a "business as usual" development scenario is carried out, this finite and precious resource will be further depleted. By 2040, 18,300 acres of farmland in the Rogue Valley are projected to be converted to development, which is 17% of total farmland under threat across the entire State.
- There are opportunities to reverse and mitigate the environmental impacts of a destabilized climate and the impacts of development—a number of state and federal programs offer incentives for farmers to adopt sustainable practices, which can directly reduce these impacts. Additionally, there is significant potential to encourage communities and individuals to change their habits and practices, leveraging their reported concern and awareness of these issues. By combining farmer-focused programs with community-level initiatives and supporting these efforts through education and outreach, a holistic strategy can be developed to foster collective action and sustainable environmental stewardship.

2.5 Current Policy Landscape

- Land use: Oregon's Agricultural Land Use policy
- Water use: Irrigation Modernization act
- Oregon water resources department presentation on water rights
- WISE Project - Amber and Melina re Wyden Funding opportunities

Section References

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2 Skendciz, S. et. al. "The Impact of Climate Change on Agricultural Insect Pests,". 2021 12(5):440.

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4 Ibid.

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12 Hunter, M. et al., "Farms Under Threat 2040: Choosing an Abundant Future," 2022. Washington, D.C.: American Farmland Trust, accessed February 3, 2024.

13 USDA Soil Survey, Natural Resources Conservation Service, "Web Soil Survey," accessed March 5, 2024.

Community Highlight: Oregon Pasture Network

The Oregon Pasture Network (OPN), a program of Friends of Family Farmers founded in 2016, brings together Oregon's independent farmers and ranchers to expand pasture-based agriculture. We believe in the power of pasture as a vital foundation for agricultural and economic ecosystems, helping our member farms maintain both viability and profitability. Through advocacy, we work to ensure that farmers can continue doing what they do best—producing healthy food for Oregonians.

Our program is farmer-focused, dedicated to supporting Oregon's pasture-based farms and ranches in growing, sustaining, and enhancing their businesses. We believe that producers, no matter their experience level, can always learn something new to help them achieve their goals. By providing education, technical assistance, and networking opportunities, we help farmers take that next step toward their vision.

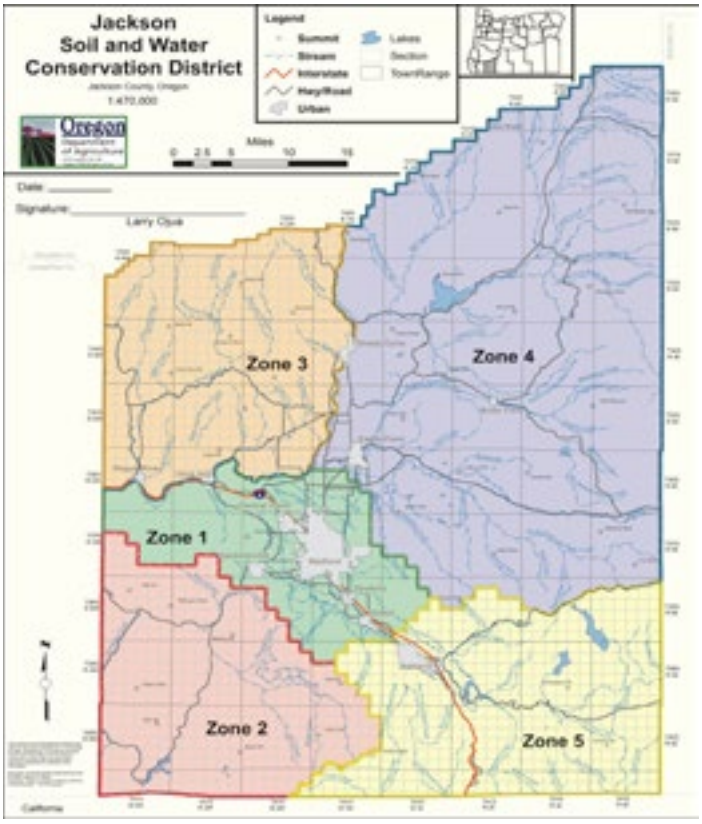
> "I've loved the education that OPN has provided as well as the updates on opportunities such as the Good Meat Project, your work in Southern Oregon with the Rogue Valley Food Systems Network, grant opportunities, and other support. It has been great to network with other farmers that are like-minded in taking care of the land."
>
> - OPN Member Farmer in Southern Oregon

Pasture-based farmers face challenges in accessing traditional technical assistance. For instance, while Oregon State University has 186 employees in Agriculture and Natural Resources, only 17 specialize in pasture and forage, with just one focusing on organic forage statewide. This gap means the farmers we support can access less than 10% of the largest technical resource in the state, and some issues have only a single specialist available to address them. OPN helps fill this gap by offering resources for producers at any stage, along with opportunities to meet, learn from, and connect with others. Together, we're building a strong community of environmentally focused livestock producers across Oregon.

Community Highlight: Jackson Soil and Water Conservation District

Starting in the spring of 2025 Jackson Soil and Water Conservation District (JSWCD), in partnership with the Natural Resource Conservation Service (NRCS) will begin implementing projects focused on water quality via a granting program called the National Water Quality Initiative (NWQI). The NWQI provides a means to accelerate voluntary private lands conservation investments to improve water quality with dedicated financial assistance through NRCS's Environmental Quality Incentives Program (EQIP), Clean Water Act (CWA) Section 319, or other funds to focus state water quality monitoring and assessment efforts where they are most needed to track change over the next 5 years. A key part of the NWQI targeting effort includes the implementation of conservation systems that avoid, trap, and control runoff in these high-priority watersheds. The Rogue NWQI is focused on the Upper Rogue River watershed and encompasses the Antelope Creek, Reese Creek, Whetstone Creek, Lick Creek, Indian Creek and Kanutchan Creek drainages.

The conservation practices will focus on water quality improvements through irrigation infrastructure updates, pasture and hayfield management practices and riparian area management. Some example NRCS practices that will be utilized with this plan are; flood to sprinkler irrigation conversion, grazing management planning, nutrient management planning, fencing, pasture and hayfield seeding, stock water systems, sacrifice area development, invasive species removal/treatment, native riparian species restoration and harden stream crossings. Technical assistance will be provided one-on-one to residents by JSWCD staff within Jackson County through onsite visits and other formats. Landowners, farmers, and rural and nonrural residents will be provided information to help make informed decisions regarding the interaction between natural resources and agricultural management, project design and implementation, and securing funding for these projects. For projects that align with the overall goals of JSWCD, financial assistance through grant funding may be offered. JSWCD may apply for the funding, or assist others in completing grant applications. Additionally, JSWCD may be able to utilize district funds to help support these conservation projects.



– Josh Bilbao, Agricultural Resource Conservationist, JSWCD

Food System Infrastructure

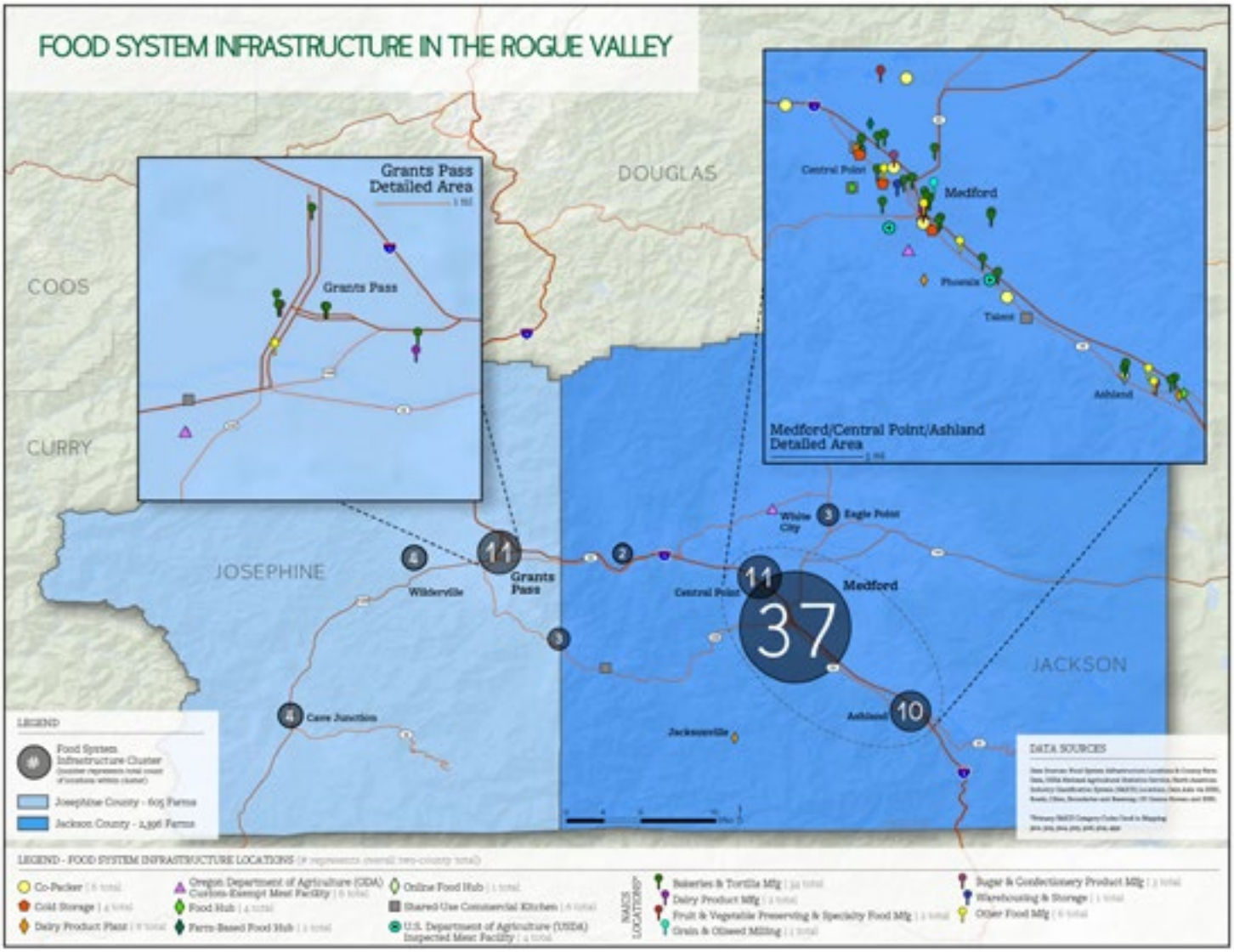
3.1 Overview of Food System Infrastructure in Rogue Valley and the State

Pears made the Rogue Valley famous. During the 1920s, pears from the Rogue Valley began to be shipped to as far away as New York City. A matrix of dams and irrigation ditches, as well as packing sheds, cold storage, and distribution systems all developed as part of the infrastructure that was needed to grow and support the burgeoning orchard businesses in the valley. Today, some of that infrastructure remains, but other components have fallen into disrepair or disappeared as orchards closed or transitioned into other crops. A key component in both assessing the food system and looking at the region's capacity to increase food production is understanding the physical and human infrastructure needs of the community and availability of those resources.

Infrastructure in a food system is key to growing the capacity of a region to be both resilient and economically viable. Often, it is the existence of infrastructure, or lack thereof, that can make or break a region and its ability to maintain and expand production. Physical infrastructure can range from cold and dry storage to packing sheds, processing facilities, coordinated distribution routes, shared commercial kitchens, food hubs, and more. Food hubs, for example, play a critical role in marketing, aggregation, and distribution, connecting producers to markets and ensuring that local products reach consumers efficiently.

Equally important is human infrastructure, which includes roles like marketing, value chain coordination, and procurement. These activities require skilled individuals who can foster connections across the food system, build trust between stakeholders, and develop innovative strategies for market access. Expanding human infrastructure means investing in training, networking opportunities, and positions that support collaboration, such as food system coordinators, market managers, and logistical planners. Without these key roles, even the best physical infrastructure cannot fully realize its potential to strengthen a regional food system.

While the Rogue Valley has some infrastructure in place—such as large fruit packing facilities, at least four smaller distribution food hubs, and larger processing



facilities of companies like Amy's Kitchen—the food assessment found that key infrastructure components, particularly for small and mid-sized producers, could make a huge difference in expanding the capacity of producers and contributing to the economic prosperity and long-term resiliency of our region.

Currently, there is an older wave of infrastructure operating at a large scale—such as Amy's Kitchen and Maranatha—but there is a notable lack of "right-sized" facilities for growing businesses. These businesses often face prohibitive build-out costs or a shortage of suitable facilities available for purchase. Additionally, access to commercial kitchens in rural areas is a major barrier for entrepreneurs. Many small towns lack nearby facilities, forcing producers like Mido's Miso to drive over an hour to process their products. Some facilities limit their operations to weekends only, as is the case with Joey's Hot Sauce. Compounding this issue is the fact that some rural commercial kitchens, even if technically "shared" or "rentable," are often held in reserve for specific community programs, tying up the facility and preventing access for food businesses. Examples include the Boys and Girls Club kitchen in the Illinois Valley and six fairgrounds kitchens. Addressing these gaps in infrastructure is critical to ensuring that small and mid-sized producers can thrive and that the region can build a food system capable of meeting future challenges.

Some of the key infrastructure pieces currently needed to support our region's food production include a coordinated distribution network of already existing food hubs, minimal processing for fruits and vegetables with freezing capacity, and meat processing facilities, particularly for chicken at a larger scale. A USDA meat processing facility for beef has been missing from the region for more than thirty years, but thanks to the efforts of Rusted Gate Farm and Montgomery Meats, there is now a facility that can eventually be used to

process cattle, sheep, and goats. One of the barriers to building and retaining infrastructure is having adequate local production to support the overhead and costs associated with maintaining facilities, while another barrier is the lack of a career training pipeline connecting youth and young adults interested in this work to professional training. Often it can be a chicken-and-egg situation (sometimes literally!) where production cannot be increased until there are adequate infrastructure facilities in place but it does not make sense financially to invest in the infrastructure until production increases.

> "A key component in both assessing the food system and looking at the region's capacity to increase food production is understanding the physical and human infrastructure needs of the community and availability of those resources."

Agriculture and food production require a long-term approach, as it can take years to scale production to meet the needs of a facility, not to mention the significant time and effort needed to build relationships and trust. One effective solution in some regions has been the creation of farmer and producer cooperatives. For example, TRACTOR (Toe River Aggregation Center Training Organization Regional) in North Carolina has demonstrated how a well-structured cooperative can transform a regional food system. Since its founding in 2012, TRACTOR has connected over forty growers with retail buyers like Ingles and Lowe's Foods, providing essential infrastructure such as cold storage and processing facilities. This model has enabled farmers to collectively access larger markets and sustain their operations, contributing to the region's economic and agricultural resilience.

Closer to home, the Siskiyou Sustainable Cooperative (SSC) once played a similar role in the Rogue Valley. For over fifteen years, SSC fostered collaboration among local farms, particularly through crop planning initiatives and a successful community-supported ag-

riculture (CSA) program that served around 250 families. However, when SSC sunsetted, it left a significant gap in coordinated crop planning and farmer-led infrastructure development.

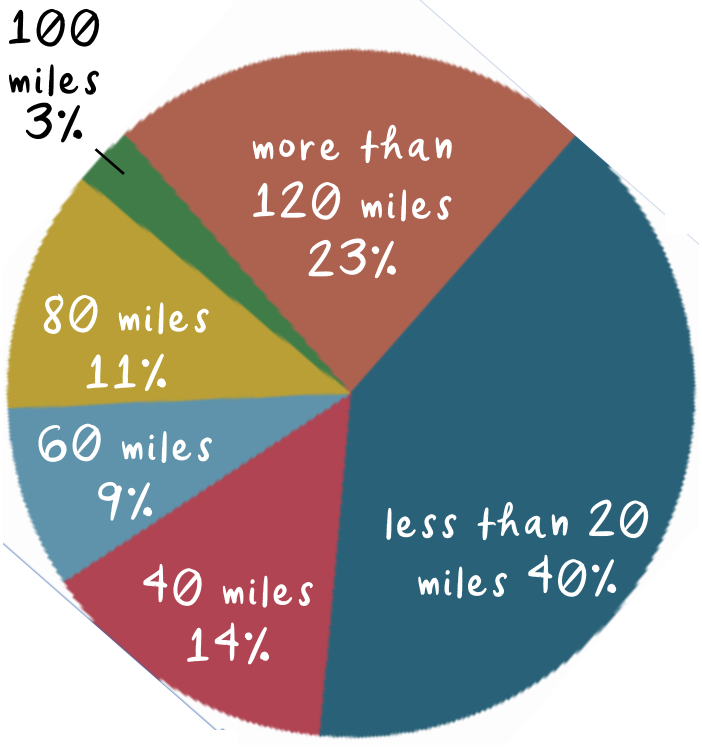
To create a truly resilient and robust local food system in the Rogue Valley, it will be essential to help producers identify both individual and collective infrastructure needs. Facilitating investment in co-op-style enterprises and fostering regional collaboration can address these gaps, building on successful models like TRACTOR while learning from the challenges experienced following the dissolution of SSC. By prioritizing cooperative infrastructure development, we can expand production capacity and strengthen the long-term viability of our local food system.

> "Agriculture and food production require a long-term approach, as it can take years to scale production to meet the needs of a facility, not to mention the significant time and effort needed to build relationships and trust."

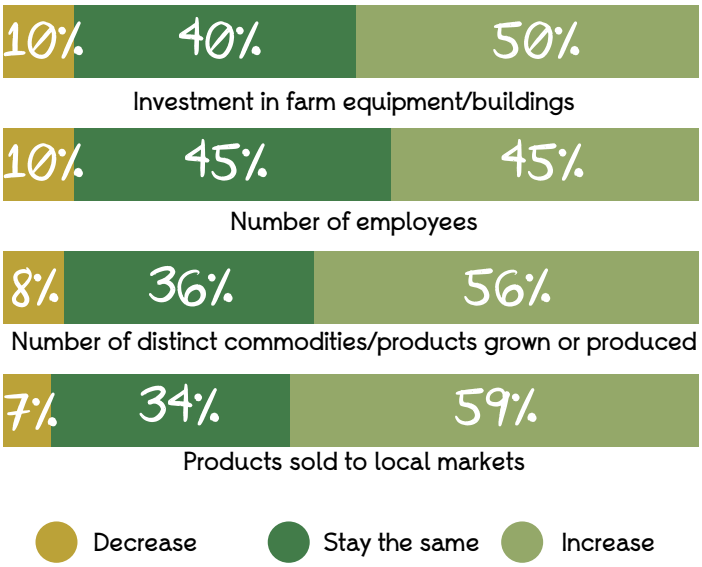
Key Findings:

- Nearly 50 percent of Rogue Valley ranchers said they are traveling more than 120 miles to process their animals, listing the lack of an adequate USDA meat processing facility as a major barrier to expanding their productivity and ability to grow economically. The new facility thanks to the efforts of Rusted Gate Farm and Montgomery Meats will begin to address this issue.
- Many of the schools and other institutions, as well as individuals, expressed an interest in purchasing locally raised and processed chicken.
- The lack of collective and individual cold storage facilities continues to limit production capacity for many producers. Additionally, some cold storage that exists is not being used to full capacity.
- Due to geographic distance or lack of a shared-use commercial kitchen, makers are turning to building out commercial kitchens in homes and/or garages.
- A strength of the Rogue Valley is the diversity of food outlets, ranging from growers markets to CSAs; however, many of these remain inaccessible to low income and remote individuals despite excellent strides in this area. Continuing to invest in programs such as Double Up Food Bucks and SNAP as well as working with the more than fifty grocery stores in the Rogue Valley to purchase more local produce and products could help improve accessibility and the economic success of the region.
- Nearly 80% of the producers use their own vehicles for distribution, indicating a need for a coordinated distribution network both to financially support farmers as well as reduce our region's carbon footprint.
- The need for financial support for infrastructure far outstrips available funding, despite increases in grant programs. Most recently, for example, $33 million in requests were submitted for a $5 million pool via the Resilient Food Systems Infrastructure program. This speaks to a desire of producers to increase production because they see demand for their products but lack the financial resources to build the infrastructure needed.

On average, how far do you drive to your preferred slaughter/processor facility (one way)?



Over the next 5 years, which of the following aspects of your business do you expect to increase, decrease or keep the same?



3.2 Sector Facts

The State of Oregon is home to:

- ten inspected meat and poultry facilities
  - four USDA inspected meat facilities[1] all of these are located at least 180 miles from the Rogue Valley
  - one USDA inspected meat facility—new in 2024; it is located in the Rogue Valley
  - six ODA custom-exempt facilities[2]
- fifty food manufacturing facilities (listed under NAICS 311)[3]
  - NAICS 3112 Grain & Oilseed Milling = 1
  - NAICS 3113 Sugar & Confectionary Product Mfg = 3
  - NAICS 3114 Fruit & Vegetable Preserving & Specialty Food Mfg = 2
  - NAICS 3115 Dairy Product Mfg = 2
  - NAICS 3117 Seafood Product Preparation & Packaging = 0
  - NAICS 3118 Bakeries & Tortilla Mfg = 36
  - NAICS 3119 Other Food Mfg = 6
- four cold storage facilities[4]
- six co-packers[5]
- six shared-use commercial kitchens

The Rogue Valley is home to:

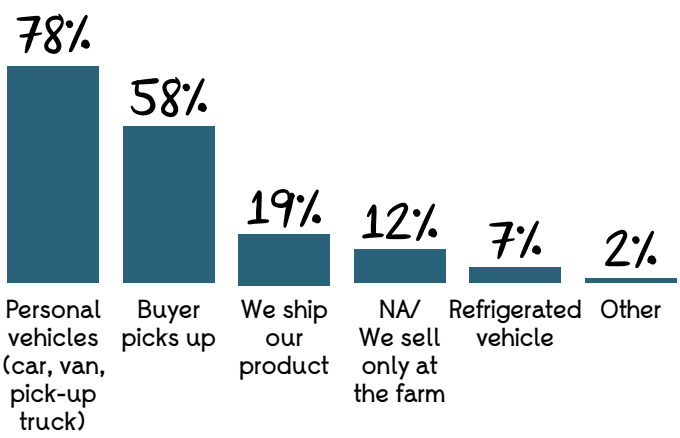
- 654 restaurants[6]
- many local food sales outlets:
  - eight farmers markets
  - nine CSAs
  - nine micro food hubs or local food aggregators (five are farm-based food hubs, one is based online): Fry Family Farm, Josephine County Farm Collective, Rogue Natural Foods, Applegate Valley Food Hub, Rogue Produce, Whistling Duck Farm
  - six dairy farms with direct to consumer sales
  - fourteen farm stands at the time of print
- ..and traditional retail outlets:[7]
  - fifty-six grocery stores
  - thirty-two specialty food stores
  - seventy-eight convenience stores
  - thirty-six grocery product wholesalers

3.3 Survey and Focus Group Findings

2023 Food Summit roundtable: Food System Infrastructure

- Infrastructure strengths: The Rogue Valley benefits from established food hubs, farmers markets, cold storage, processing facilities, and CSA programs, supported by strong networks and public backing for local, sustainable food systems.
- Key challenges: Mid-scale production and processing capacity, water infrastructure, stable funding, and distribution models are underdeveloped, while coordination between local policies and resource access remains limited.
- Opportunities for growth: Implementing resource sharing, regional branding, sustainable funding models, and stronger collaborations with health care and educational institutions can drive food system resilience and efficiency.

Which of the following distribution strategies do you use on your farm? Select all that apply.



- Immediate actions needed: Develop a regional resource guide, expand infrastructure access (e.g., commercial kitchens, cold storage), align local policies, and explore innovative funding to close infrastructure gaps and build a robust food network.

Farmer Survey 2024 Results

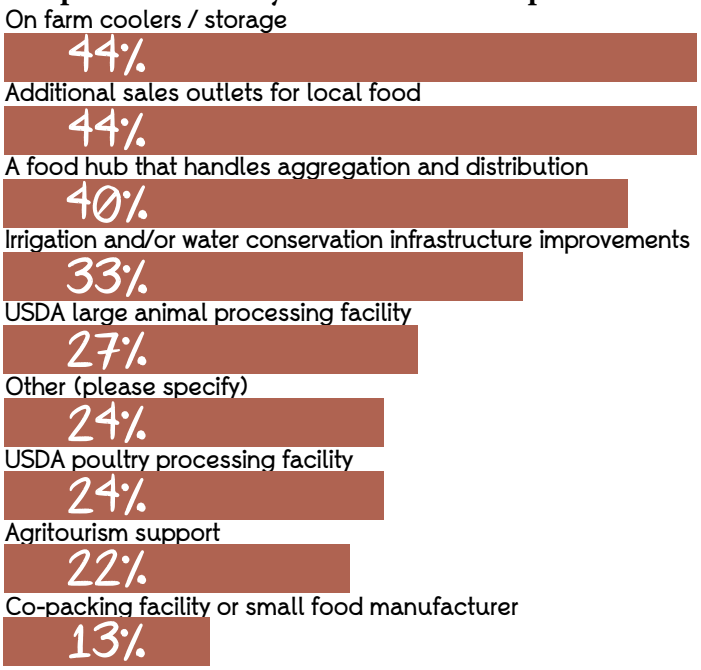
- Of rancher survey respondents, 49% reported their top barrier to expanding their business was that the nearest USDA processor was too far away from their farm. The "cost of processing" and "bottlenecks in processing options" were tied at number five with 31% reporting them as top barriers.
- Of rancher survey respondents, 23% reported they drive more than 120 miles one way to get to their preferred slaughter/processing facility. *See chart.*
- Farm business infrastructure increases/decreases: Half of farmers surveyed said they will invest in their farm buildings/infrastructure in the next five years. ***See graph.***
- Distribution methods farmers use: 78% of farmers surveyed reported using their personal vehicle to distribute their products, indicating a lack of larger scale distribution networks or infrastructure being employed locally. ***See graph.***
- Local farm infrastructure needs: While 15% of farmers report no cold storage access, either on farm or leased, 63% report having on-farm cold storage and 44% report needing access to additional cold storage in order to scale their business; 40% said access to a food hub that handles aggregation would support scale. USDA processing for large animals and poultry were also mentioned by a quarter of farmers interested in scaling their business. ***See graph.***

3.4 Trends and Challenges

- Surveyed farmers and ranchers report interest in scaling their businesses but access to on- and off-farm storage infrastructure and meat processing are major barriers to growth.
- While there are four USDA meat processing facilities in the region, ranchers report traveling far distances to access their desired processors, indicating facilities in the region may not be meeting the needs of small to mid-sized producers.
- There is a lack of fruit and vegetable processing in the Rogue Valley that serves smaller producers.
- There are nine reported micro food hubs or local food aggregators in the region, signaling a strong local food marketplace. However, 40% of farmers mentioned needing an additional food hub to help them scale up their business. The existing hubs may

not be meeting the needs of these types of farmers or are geographically inconvenient for farmer access.
- Increased connection and networking among farmers may increase the market opportunities available to them through shared distribution networks, marketing or sales.
- Food manufacturing is clustered in population centers, making rural access more difficult.

Which of the following food system infrastructure components would you need to scale up?



3.5 Current Policy Landscape

The Oregon Department of Agriculture (ODA) administers the Resilient Food Systems Infrastructure (RFSI) grant program, funded by the USDA's Agricultural Marketing Service. This program aims to strengthen local and regional food systems by enhancing infrastructure for the aggregation, processing, manufacturing, storing, transporting, wholesaling, and distribution of locally produced food products, excluding meat and poultry. Emphasizing support for small and emerging farms and food businesses from historically disadvantaged groups, the RFSI offers two grant tracks: (1) infrastructure grants, ranging from $100,000 to $2 million, and (2) simplified equipment-only grants, ranging from $10,000 to $100,000.

The Oregon Community Food Systems Network (OCFSN) administers the Farmer and Rancher Disaster Resilience grant program, funded with $2.65 million allocated during the 2023 Oregon legislative session. This program supports small and underserved producers in Oregon by funding on-farm infrastructure projects aimed at enhancing resilience to climate impacts such as heat, smoke, and drought. Eligible projects include improvements in irrigation and water efficiency, shading and cooling systems, soil health management, crop management, ecosystem management, equipment purchase or refurbishment, and on-farm planning, monitoring, and research.

Section References

1 *https://www.youtube.com/watch?v=vwSRqaZGsPw*

2 P. Sherman, Oregon Department of Agriculture, Food Safety, Meat Inspection Program, personal email communication on April 8, 2024.

3 Environmental Systems Research Institute (ESRI), "Data Axle," 2023, accessed April 29, 2024.

4 Desktop research via Google, accessed April 18, 2024.

5 Oregon Department of Agriculture, "Food Safety Licensed Facilities webtool," accessed April 18, 2024.

6 U.S. Bureau of Labor Statistics, "Quarterly Census of Employment and Wages," 2022, for NAICS codes: 44511; 4452; 44512; 4244, accessed January 29, 2024.

7 Ibid.

Community Highlight: SPACE LLC

Although the space is big, the company is small. With less than ten employees currently, you'll feel a close connection to staff who are eager to help with your business storage needs.

In 1998, Space LLC was founded by six local business men, utilizing a 200,000 square foot building on Sage Road. The building was previously occupied by United Grocers, a company well-known to local people. Since 1998, Space LLC has supported the community in a unique way. With 200,000 square feet of open warehouse, the options for storage were endless. The owners had a vision of providing class A warehouse space to tenants with the goal of long-term relationships. They soon discovered there was a need for third-party warehousing and that developed into a need for local shuttles, so a trucking division was created. Within a short amount of time, all of the empty space would be filled with numerous businesses. In 2008, Space LLC would build a brand-new building, with over 100,000 square feet, capable of a vast variety of storage options, including the capability of becoming a -10-degree freezer. Whether wrangling dinosaurs or building new coolers and freezers to accommodate tenants' requirements, Space LLC strives to build and maintain clean and well-kept space to fulfill the needs of the community.

Community Highlight: Fry Family Farm

Fry Family Farm was founded by Suzi and Steve Fry in 1990 on just two acres. Today, it has expanded to more than ninety acres of vegetables, flowers, and berries being grown in Talent, Phoenix, Medford, and Ashland. In 2015, Fry Family Farm worked to become a food hub, building the infrastructure and purchasing the equipment needed to provide a joint packing and shipping area for regional producers. They expanded their facilities by building a 7,000–square foot food hub to serve as an adjunct to farm operations and to support other regional producers. The new facility provides processing (wash, sort and pack); storage (freezer, refrigerated and ambient temperature); a certified commercial kitchen; a retail farmstand; and consolidated shipping services. This project was and still is crucial in helping the economic stability of farmers in southern Oregon and providing increased food security for the region. Many farmers in the area don't have the time or resources to accomplish the infrastructure and business management needed to handle the logistics of bringing food from the farm to the wholesale market. Their farm store located on Ross Lane features nearly twenty different local producers, ranging from grain producers to eggs, pasta, meats, and fruit. Their CSA boxes feature their own produce as well as that of other local producers and OGC products from the western region as well. Without doubt, one of the most utilized partnerships producers and farm organizations have is with Fry Family Farm.

Community Highlight: Rusted Gate Farm

For decades, the Rogue Valley has lacked the ability to process livestock with USDA certification. This has encouraged exports and a centralized system, limiting economic opportunities for both producers and consumers in the local food economy. It has also impacted the quality and health of livestock and the environment.

Food movements have inspired smaller, modular, and mobile animal processing ventures across the country, but challenges related to scaling, regulations, workforce, and zoning have made it difficult for many projects to succeed.

In 2024, Rusted Gate Farm and Montgomery's Meats launched a compact hybrid facility, introducing a new approach to livestock processing that provides local producers with more options and fewer obstacles. This model was developed through over two years of financial feasibility studies, industry surveys, and relationship-building to navigate the complexities of reestablishing a once-thriving sector. Small-scale producers, long burdened by 8-hour round trips to haul animals, months-long scheduling challenges, and limited control over the processing timeline, now have a local solution that strengthens the regional food system.

Beyond the benefits to local livestock producers, butcher shops, and consumers, the project also reduces transportation impacts on both the environment and the animals, leading to more humane handling and a higher-quality end product.

Labor and Employment

4.1 Overview of Labor and Employment in Rogue Valley and the State

The labor force behind the Rogue Valley food system is as critical to the region's vitality as its fertile soils, flowing rivers, and forested hillsides. Over generations, this workforce has evolved, shaped by the ebb and flow of agricultural practices, economic conditions, and cultural shifts. From the early days of subsistence farming and small-scale ranching to the emergence of larger agricultural operations, food production in this region has consistently relied on a complex web of human effort and ingenuity. Today, labor and employment in the Rogue Valley food system illuminate both the opportunities and challenges of building a thriving, equitable regional food economy.

At the heart of the Rogue Valley's food economy are the farmworkers, restaurant employees, truck drivers, and other laborers who ensure the system's success. Among them are approximately 7,000 farm laborers, including 3,700 migrant and seasonal workers, many of whom are Latinx.

The median hourly wage for Oregon farm workers is $16, with average annual income of $29,000 for a family of four. Farm labor is physically demanding; for example, pear harvesting requires workers to navigate ten- to twelve-foot ladders while carrying sixty-five-pound bags, with individual workers harvesting over a ton of pears daily.

The COVID-19 pandemic brought many of these challenges into sharp relief. Farmworkers were labeled "essential," yet often lacked basic protections against the virus. Wage losses, inadequate enforcement of workplace safety regulations, and insufficient access to personal protective equipment compounded the already precarious nature of their work. Even as they toiled to keep grocery stores stocked, many workers struggled to feed their own families, reflecting systemic inequities that remain unresolved.

Recent policy changes have highlighted both the promise and complexity of addressing labor issues in the region. Oregon's farmworker overtime law, passed in 2022, represents a significant step toward improving worker compensation. This law phases in overtime pay requirements, starting with fifty-five hours per week in 2023 and moving to forty hours by 2027. While this change aims to rectify long-standing inequities, it has

also raised concerns among small and midsize farm operators about increased labor costs and operational viability. Recent heat protection rules mandate constant water access and unrestricted breaks as temperatures rise. Oregon joins Washington and California as the only states mandating full-body shade protection for workers. For wildfire conditions, when the Air Quality Index (AQI) reaches 201+, employers must provide approved masks, and at 501+ AQI, fitted respirators become mandatory (UNETE interview, 2024).

Similarly, efforts to update agricultural labor housing regulations reflect a commitment to improving living conditions for farmworkers. However, these proposed changes have sparked tensions between advocates for worker safety and growers who fear the financial burden of compliance. Such debates underscore the delicate balance required to support both workers and employers in the region.

> "The COVID-19 pandemic brought many of these challenges into sharp relief. Farmworkers were labeled "essential," yet often lacked basic protections against the virus. Wage losses, inadequate enforcement of workplace safety regulations, and insufficient access to personal protective equipment compounded the already precarious nature of their work. Even as they toiled to keep grocery stores stocked, many workers struggled to feed their own families, reflecting systemic inequities that remain unresolved."

Housing insecurity further complicates the labor landscape. Many farmworkers live in crowded or substandard conditions, and the high cost of housing in the region limits options for improvement. Employers often struggle to recruit and retain workers without adequate housing solutions, creating a feedback loop that stifles economic growth and worker wellbeing.

The 2009 closure of the Bureau of Labor and Industries Southern Oregon office has impacted enforcement of labor protections. Workers must now file complaints online to offices in Portland, Eugene, and Salem, with investigations typically taking six to eight months.. While Oregon passed laws requiring improved farm worker housing conditions ten to fifteen years ago, implementation varies widely. Some housing lacks air conditioning or adequate sealing against smoke and pesticide drift. Standard low-income housing models often fail to serve farmworker families, as combined household incomes may exceed eligibility thresholds while remaining insufficient for market-rate housing.[1]

The Rogue Valley's agricultural labor force is not only grappling with worker shortages but also with the challenge of an aging farmer population. Across the region, the average age of farmers has steadily risen, reflecting a broader national trend. Many experienced farmers, often the backbone of local agriculture, are nearing retirement without clear succession plans or younger generations prepared to take their place. This demographic shift poses significant risks to the long-term sustainability of the food system, as knowledge and expertise risk being lost. Supporting programs that connect young and beginning farmers with retiring operators, such as land transition assistance and mentorship opportunities, are becoming increasingly critical. These efforts not only preserve valuable farming traditions but also ensure that the agricultural sector continues to thrive amid changing economic and social landscapes.

Despite these challenges, the Rogue Valley food system is rich with opportunities for innovation and collaboration. Organizations like the Rogue Farm Corps have worked to bring new and beginning farmers into the field. Partnerships with local colleges have established training initiatives, such as meat processing programs, to address specific workforce shortages. State programs like Oregon Farm Link and equipment grants offer additional support, helping farmers navigate economic and regulatory pressures.

Organizations such as UNETE and the Northwest Seasonal Workers Association play an essential role in supporting farm laborers in the Rogue Valley, addressing critical gaps in resources, advocacy, and empowerment. UNETE, a farmworker and immigrant rights advocacy group, focuses on improving living and working conditions for migrant and seasonal workers through education, community organizing, and direct support services. Their initiatives include providing legal assistance, organizing health clinics, and fostering

leadership among workers to advocate for their rights. Similarly, the Northwest Seasonal Workers Association offers programs to combat the systemic inequities faced by farm laborers, including access to emergency food, housing, and healthcare assistance. Both organizations amplify the voices of farmworkers, ensuring they have representation in policy discussions and equipping them with tools to navigate workplace challenges, ultimately fostering a more equitable and supportive environment for the individuals who sustain the Rogue Valley food system.

Farmworkers themselves are key voices in identifying and addressing barriers. Their insights have informed policy recommendations ranging from improved workplace safety enforcement to expanded access to mental health services and culturally relevant resources. These initiatives demonstrate the power of community-driven solutions in fostering a more equitable and resilient food system.

The future of labor and employment in the Rogue Valley food system hinges on the region's ability to balance economic sustainability with social equity. Strengthening this balance requires a multifaceted approach: fair wages and protections for workers, resources and support for employers, and collaborative efforts to address housing, climate, and regulatory challenges.

The story of labor in the Rogue Valley is one of resilience and interconnectedness. By valuing the contributions of every worker and investing in their wellbeing, the region can build a food system that is not only economically vibrant but also equitable and sustainable for generations to come.

Key Findings:

- Agricultural employers face multiple operational challenges: increasing labor costs from overtime regulations, difficulties with worker recruitment/retention due to housing shortages, and financial strain from new worker protection requirements around heat, smoke, and housing, particularly impacting small and midsize operations.

"The future of labor and employment in the Rogue Valley food system hinges on the region's ability to balance economic sustainability with social equity. Strengthening this balance requires a multifaceted approach: fair wages and protections for workers, resources and support for employers, and collaborative efforts to address housing, climate, and regulatory challenges."

- Farm ownership faces systemic threats to sustainability: an aging farmer population without clear succession plans, geographic constraints limiting mechanization options, and labor consistently ranking as top barriers in farmer surveys despite available tax credits and support programs.
- The Rogue Valley food economy supported 18,397 jobs across 1,339 establishments in 2022, generating over $539 million in annual wages, comprising approximately 5 to 7 percent of Oregon's total food economy.
- Among approximately 7,000 farm laborers in the region, 3,700 are migrant and seasonal workers. The median hourly wage is $16, with average annual income of $29,000 for a family of four.
- Regional employment in the food economy sector decreased 6.4 percent between 2019 and 2022, exceeding the state decline of 3.3 percent. Average

Migrant and Seasonal Farmworker (MSFW) Estimates (2018)

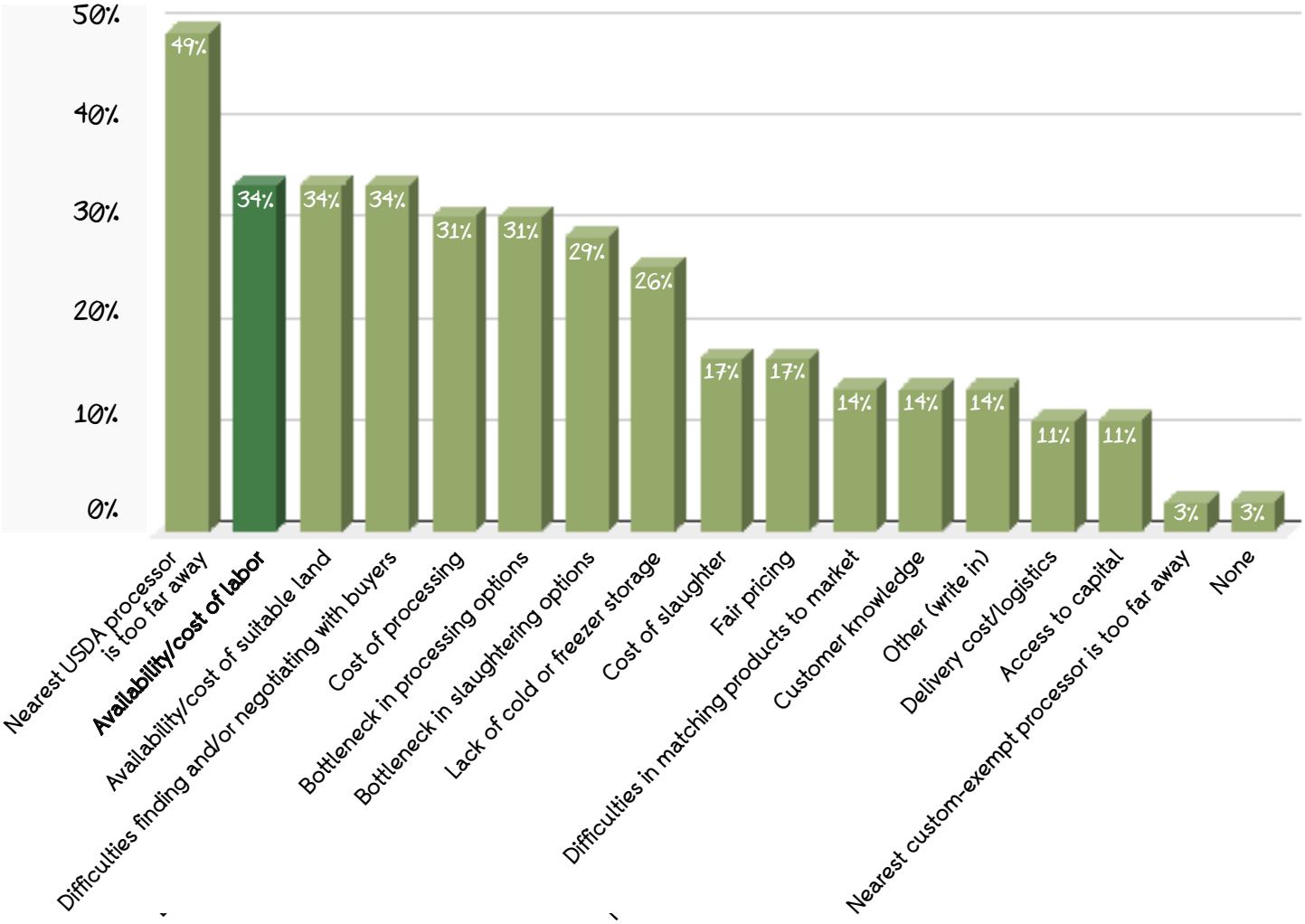
	Total MSFW Estimates	Migrant Workers	Seasonal Workers	Non-Farmworkers in Migrant Households	Non-Farmworkers in Seasonal Households	Total MSFW Workers and Non-Farmworkers
Jackson County	3,287	1,101	2,186	977	2,303	6,567
Josephine County	413	138	274	123	289	824
All of Oregon	86,389	28,940	57,449	25,682	60,540	172,611

wages increased 12.4 percent but lagged behind the state increase of 17.2 percent.

4.2 Sector Facts

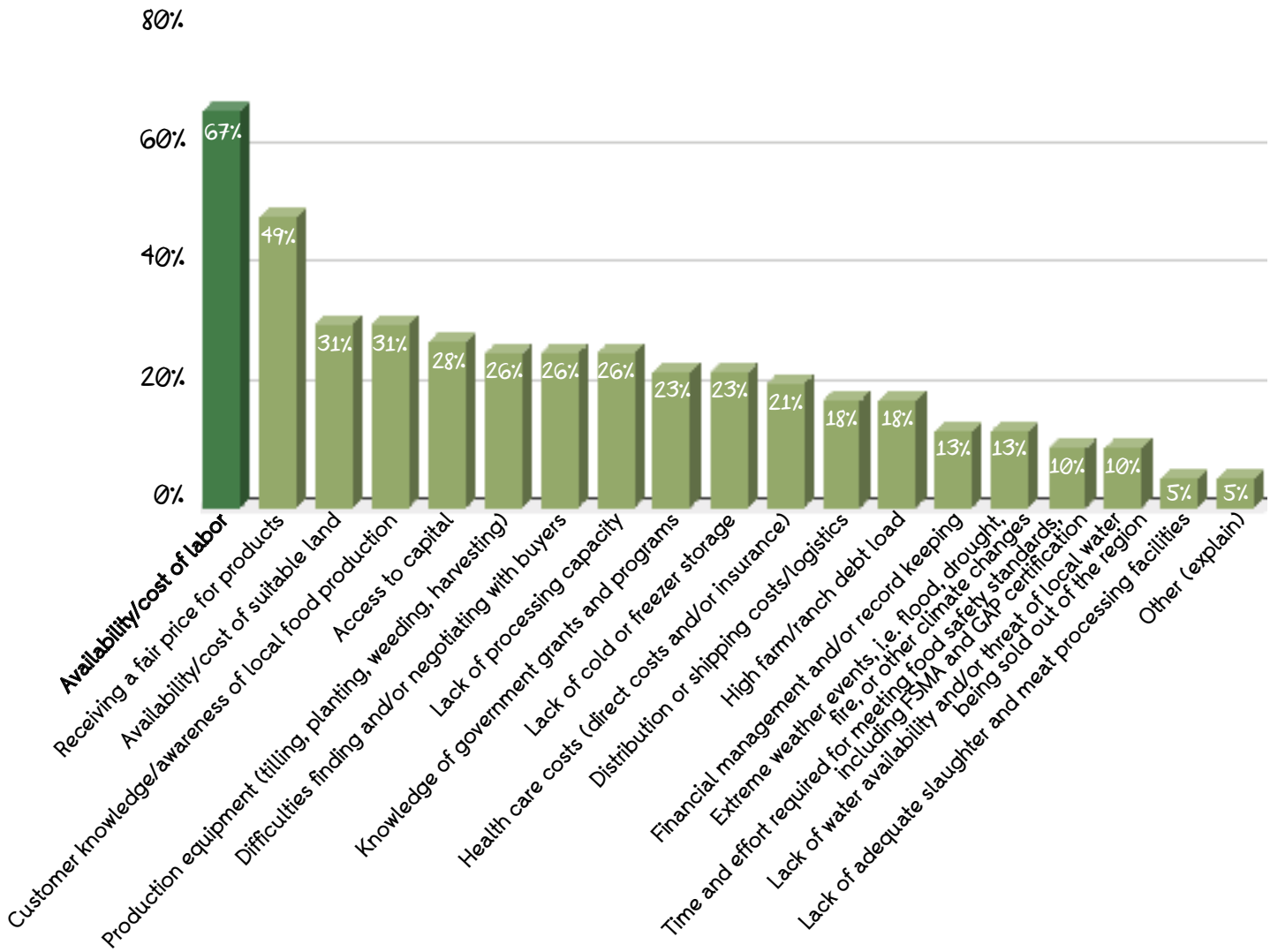
- In 2022 in the Rogue Valley, 18,397 people were employed in 1,339 establishments, totaling $539,040,187 in annual wages of the food system economy sector, comprising approximately 5 to 7 percent of Oregon's total food economy (4.9% of total annual wages, 5.9% of annual employment, and 6.8% of annual establishments).[23]
  - **The number of establishments in the food economy sector has remained constant** between 2019 and 2022 in the Rogue Valley (+0.5%), on par with the state trend (+0.5%).
    - JaCo = 1.6% | JoCo = -2.9% | JaJo Cos = 0.5% | Oregon = 0.5%
  - **The number of employees in the food economy sector has decreased** between 2019 and 2022 in the Rogue Valley (-6.4%), at a greater magnitude of decline than the state trend (-3.3%).
    - JaCo = -6.9% | JoCo = -5.1% | JaJo Cos = -6.4% | Oregon = -3.3%
  - **Annual average wages in the food economy sector have increased** between 2019 and 2022 in the Rogue Valley (12.4%); however, the magnitude of the change is less than the state increase (17.2%).
    - JaCo = 12.5% | JoCo = 12.1% | JaJo Cos = 12.4% | Oregon = 17.2%
- There are approximately 86,400 migrant and seasonal farmworkers in the **state of Oregon**. With the family members who accompany them, they total nearly 173,000 individuals who depend on income from farm jobs.[4]

Below are some barriers that might prevent you from expanding your livestock business or continuing your operation in 2024. Please select the top five barriers that apply to you.



- In **Jackson County** alone:
  - migrant workers = 1,101
  - migrant worker dependents = 977
  - seasonal workers = 2,186
  - seasonal worker dependents = 2,303
  - total of 6,567 estimated number of farmworkers and their dependents as of 2022; 92% of the farmworker population in Jackson County is Latinx (8% other); 64% is male and 36% is female
- According to 2022 USDA Ag Census, **7,079 people are employed in farm labor in the Rogue Valley:**[5]
  - 3,667 (52%) are paid workers
  - 503 (7%) are migrant labor
  - 2,927 (41%) are unpaid workers (defined as not being on payroll)
  - Increases in farm workers' wages have been observed across the entire U.S. agricultural sector, suggesting that labor cost and availability will continue to be a challenge for growers. Between 2000 and 2022, the real (inflation-adjusted) hourly wage rate of hired farm workers in the United States increased by 28% and is eleven percentage points higher than the hourly wage growth for nonfarm workers.[6] Many Oregon fruit and vegetable producers have had a hard time finding sufficient labor in recent years and have seen costs increase significantly.[7] At the county-level, there are contrasting trends with regard to annual hired farm labor *payroll. In* Jackson County, hired farm labor payroll has increased by 57% between 2017 and 2022, while in Josephine County, hired farm labor payroll has decreased by 22% over that same time period. Hired farm labor at the state level has increased by 31%. (*Note this change in

Below are some barriers or concerns that farmers in your region may face. Please select the top five barriers that apply to you.



annual hired farm labor payroll at the county level does not account for inflation.)

- According to Oregon Health Authority county estimates, in 2018 **there were 3,700 migrant and seasonal farmworkers in the Rogue Valley.**[8]

***Note on discrepancy in numbers of migrant workers here:** *Please note Ag Census is a baseline and that the migrant and seasonal farmworkers number shows potential discrepancies with migrant worker data collection.*

4.3 Survey and Focus Group Findings

2023 Food Summit roundtable: Labor and Employment

- Strengths in the labor industry in Oregon include improved policies and regulations for workers in the state, state funds for farm worker housing, and greater public awareness of workers rights.
- Challenges include the fact that new regulations, while good for workers, strain the resources of small businesses/employers. There is a lack of low income housing and low to no oversight for farmer safety guidelines. There is also a lack of opportunity for under-resourced farmers.
- Opportunities include USDA equipment grants, dry farming initiative, Oregon Farm Link and increasing outreach efforts to connect farmers and farm workers to emerging opportunities and training. Needs include equipment lending library and increased farmer networking tool to collaborate.

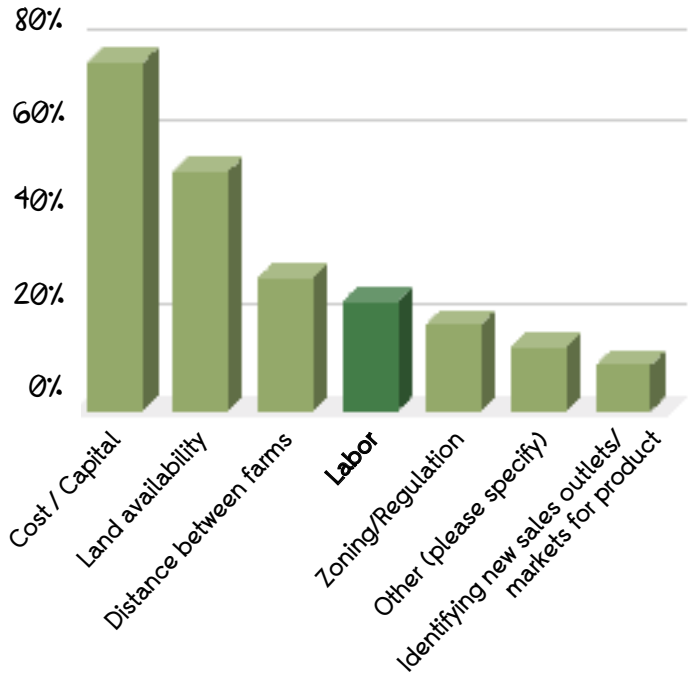
Farmer 2024 Survey results:

- Barriers that prevent you from expanding your livestock business: Labor is the number three cited barrier that farmers face when trying to expand their livestock business. ***See graph.***
- Top barriers farmers face: Labor is the number one challenge farmers report in the the Rogue Valley farmer survey. ***See graph.***
- Barriers to accessing additional land: Labor is the number four challenge out of seven in farmers' reported barriers to accessing additional land to expand. ***See graph.***

4.4 Trends and Challenges

- The region makes up between five and seven percent of Oregon's total food economy sector by annual wages.
- While the number of food establishments in the region has remained constant, the number of people employed in this industry has decreased and wages have risen.[9]
- There are an estimated 6,567 farm workers and their dependents in Jackson County alone. Ninety-two percent of the farmworker population in the county is Hispanic, and 7 percent of all farmworkers in the Rogue Valley are migrant farmworkers. The USDA defines a migrant worker as follows: A migrant farm worker is a farm worker whose employment required travel that prevented the worker from returning to his/her permanent place of residence the same day.
- There are new statewide regulations that protect workers and provide funding for farm worker housing. However, while good for the workers, some of these policies put a strain on the farm owner who has to provide additional infrastructure and resources, burdening their already struggling business.
- Labor is a top reported challenge for farmers across the board, both in the livestock industry and in vegetable production. It was consistently cited as a barrier to business expansion, land acquisition, and farm business viability.

What is preventing you from accessing additional land? Select all that apply.



- The region lacks specialized training programs in key areas like meat processing. Strong FFA programs in schools (Eagle Point, Crater, Phoenix, Three Rivers) provide crucial agricultural education and professional development, though programs aren't available in all districts.
- Young people from agricultural backgrounds increasingly pursue corporate agricultural positions rather than direct farming, highlighting the need for programs supporting next-generation farmers and farmworkers.
- There is a critical need for expanded mentorship and knowledge transfer programs connecting experienced farmers with beginning farmers. As the farming population ages, structured mentorship could help preserve valuable agricultural expertise while supporting new farmer success through land transition assistance and hands-on training.

4.5 Current Policy Landscape

Current policy landscape for food systems labor and employment in the Rogue Valley centers on three major recent changes:

1. Farmworker overtime law (2022)
   - phases in overtime requirements through 2027
   - starts at fifty-five hours per week in 2023
   - moves to forty hours per week by 2027
   - Includes tax credits for employers to offset costs
2. Heat and smoke protection rules (2021–22)
   - mandate constant water access
   - require full-body shade coverage
   - require breaks without wage penalties as temperatures rise
   - mandate NIOSH masks at AQI 201+
   - require fitted respirators at AQI 501+
   - permit evacuation at level 1 fire orders
3. State-level changes
   - Oregon minimum wage increases (2023)
   - state health insurance eligibility for farm workers regardless of immigration status
   - housing regulations requiring indoor lighting, bath houses, specific sink/shower ratios

These policies aim to improve worker conditions, but implementation and enforcement remain challenging, particularly for smaller agricultural operations.

Section References

1 (NSWA interview, 2024).

2 Annual number of establishments and employees, and total annual wages for the following NAICS categories: 112; 114; 1151; 1152; 311; 31212; 31213; 31214; 445; 44711; 4244; 4245; 4248; and 722 from U.S. Bureau of Labor Statistics, "Quarterly Census of Employment and Wages," 2022, accessed January 29, 2024.

3 The food system economy sector, as defined by NVA, includes number of annual establishments, average annual employment and total annual wages from the following categories of the North American Industry Classification System (NAICS): 112 Animal Production and Aquaculture; 114 Fishing, Hunting, and Trapping; 1151 Support Activities for Crop Production; 1152 Support Activities for Animal Production; 311 Food Manufacturing; 31212 Breweries; 31213 Wineries; 31214 Distilleries; 445 Food and Beverage Stores; 44711 Gasoline Stations with Convenience Stores; 4244 Grocery and Related Product Wholesalers; 4245 Farm Product Raw Material Merchant Wholesalers; 4248 Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers; and 722 Food Services and Drinking Places. NAICS is a coding system that classifies businesses by industry and is used by federal statistical agencies to collect, analyze, and publish data about the U.S. economy.

4 Oregon Human Development Corporation, "Farmworker Needs Assessment," April 2022.

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7 T. Delbridge, Oregon State University, "Labor challenges and import competition facing Oregon specialty crop farms," published August 2023, reviewed 2024, accessed November 11, 2024.

8 Oregon Health Authority, "Estimates of Migrant and Seasonal Farmworkers in Agriculture," 2018.

9 Annual number of establishments and employees, and total annual wages for the following NAICS categories: 112; 114; 1151; 1152; 311; 31212; 31213; 31214; 445; 44711; 4244; 4245; 4248; and 722 from U.S. Bureau of Labor Statistics, "Quarterly Census of Employment and Wages," 2022, accessed January 29, 2024.

Community Highlight: Rogue Farm Corps

Rogue Farm Corps trains and equips the next generation of sustainable and regenerative farmers through hands-on training, education, networking, and technical assistance programs. Hands-on training happens via Apprenticeships with partner Host Farms and the Regenerative Farming Fellowship.

The Rogue Valley Regenerative Farming Fellowship (RVRFF) provides an entry-level, on-farm, hands-on, part-time, 7-month, 300+ hour training and learning experience in regenerative/sustainable, small-scale farm production with a focus on organic mixed vegetables. It includes 2 days per week of paid farm experience at two farm sites in Central Point, OR and approximately 1 educational event per week as part of RFC's Beginning Farmer Educational Event Series. The educational events include classes, farm tours, and discussions that cover introductory agricultural production and food system topics. This program is run in partnership with the Family Nurturing Center's (FNC) Food & Farm Program and OSU Extension Small Farms in Southern Oregon.

This program is designed to be an accessible first farming experience for people who face higher barriers to entry into agriculture. Applicants who identify as BIPOC, LGBTQIA+, female, veterans, living with a disability, formerly incarcerated, and/or low-income are highly encouraged to apply.

RVRFF 2023 participant Jason Shin grew up in Bandon and worked in the corporate world. He felt the call to work with the land. Along with four other participants, Jason learned hands-on regenerative market farming with training from RFC and FNC staff. During the program participants were encouraged to develop individualized projects. Jason incorporated JADAM and Korea Natural Farming techniques on a row of perilla, an annual plant native to Southeast Asia and Indian highlands.

After the program Jason secured a farm staff position with Family Nurturing Center. In 2025, he will be a co-mentor of RFF participants. In the long term, Jason is looking for land to establish his own operation, which will include chicken production.

"I would like to start my farm [where] I can utilize KNF, JADAM and all the knowledge I learned from this program to build living soil and nutrient-dense plants with no chemicals. [I want to] produce food and medicine for family and our community while I heal the land, every year. I feel like natural farming is the future for farmers."

- Jason Shin

Community Highlight: UNETE Oregon

NOWIA Unete, Center for Farm Worker Advocacy, which began in 1996, is a movement of farm workers and immigrants that strives to empower and enrich the lives of both groups through education, cultural presentations, advocacy, representation in issues that affect their lives, and organizing to defend immigrant rights. We are the oldest Latino-led organization in the valley and are recognized as leaders in the defense of farm worker and immigrant rights.

We offer a variety of programs for our community including OHP and Oregon Marketplace application assistance, pro bono legal immigration services through ECO, support for workers in the illegal marijuana industry, classes, food pantry, rental assistance and emergency housing support, support for Spanish speaking families with children with special needs, application support for families who lost their homes and belongings in the 2020 Almeda fires, and advocacy services. We are proud to say that our staff truly is a representation of the community that we serve. We are active in educating the public about legislation that will impact their lives both positive and negative and encouraging them to become more involved in the process.

As the mechanization of farm work continues to grow in the valley and as the workforce ages, we are seeing workers displaced from their livelihood. Many are not eligible to receive unemployment benefits nor qualify for social security. Those who do qualify for social security benefits receive less than $900 a month. This is very concerning for us as we see more food insecurity and an inability to pay rent and utility bills. We see increased intolerance toward immigrant workers. We're not sure what the future holds for our valley's agricultural workers as sales decline for pears and grapes. One thing we are sure of is that we need to honor the hands that feed us with safer living and working conditions and living wages. Si, Se puede.

"We greatly appreciate your dedicated and compassionate hard work to support, educate, and advocate for Rogue Valley farm workers and immigrants. We are all in this together. Big thanks for your positive impact in our community and giving underrepresented people opportunities to thrive."

- a UNETE program recipient

Consumption and Consumer Awareness

5.1 Overview of Consumption and Consumer Awareness in Rogue Valley and the State

The Rogue Valley has a thriving local food economy that continues to evolve and strengthen through community efforts. Our region's food landscape is rich and diverse, with numerous retail outlets carrying everything from fresh produce and local meats to artisanal cheeses, homemade sauces, herbs, and wines. The visibility and recognition of locally grown products has increased significantly in recent years, supported by past initiatives like the "Rogue Grown" branding campaign, as well as current efforts such as the beloved Rogue Flavor Guide, and enhanced point-of-sale marketing at our farmers markets, grocery stores, and food co-ops.

The commitment to local sourcing runs deep in our community. Our independent grocers like Ashland Food Co-op, Medford Food Co-op, Cartwright's, Market of Choice, Shop N'Kart, and Sherm's Market, maintain strong relationships with local suppliers, often showing flexibility in working with farmers on everything from packaging to pricing. Innovative programs such as the Medford and Ashland Food Co-ops' Rogue Valley Farm Tour promotes local farms to the wider public while other programs like Market of Choice's Mojo help small producers reach wider markets. Beneath this supportive foundation of successful local marketing lies a complex interplay of challenges that our community continues to navigate. Small producers face a classic chicken-and-egg dilemma: While grocers express willingness to support local businesses, hurdles around distribution, labeling, consistency, and price points can create significant barriers for farmers and ranchers working to establish themselves as vendors with larger markets. In this delicate balance, larger markets often prioritize convenience and established supply chains over local sourcing, their purchasing decisions ultimately driven by customer buying habits and demands. Real transformation at this level will require a carefully choreographed effort—consumers consistently requesting more locally grown and raised products, while producers and buyers work together to solve the intricate puzzle of distribution networks and price points that work for everyone. Established farm stands and stores like Whistling Duck Farms, Fry Family Farms, Fort Vannoy, Rusted Gate Farms, Bigham Farms, and many others serve as vital hubs where community members can purchase food grown right on site, often serving as a beacon to rural populations. These operations, ranging from simple seasonal stands to year-round markets, provide essential direct-to-consumer outlets that help strengthen the connections between local farmers and the communities they feed.

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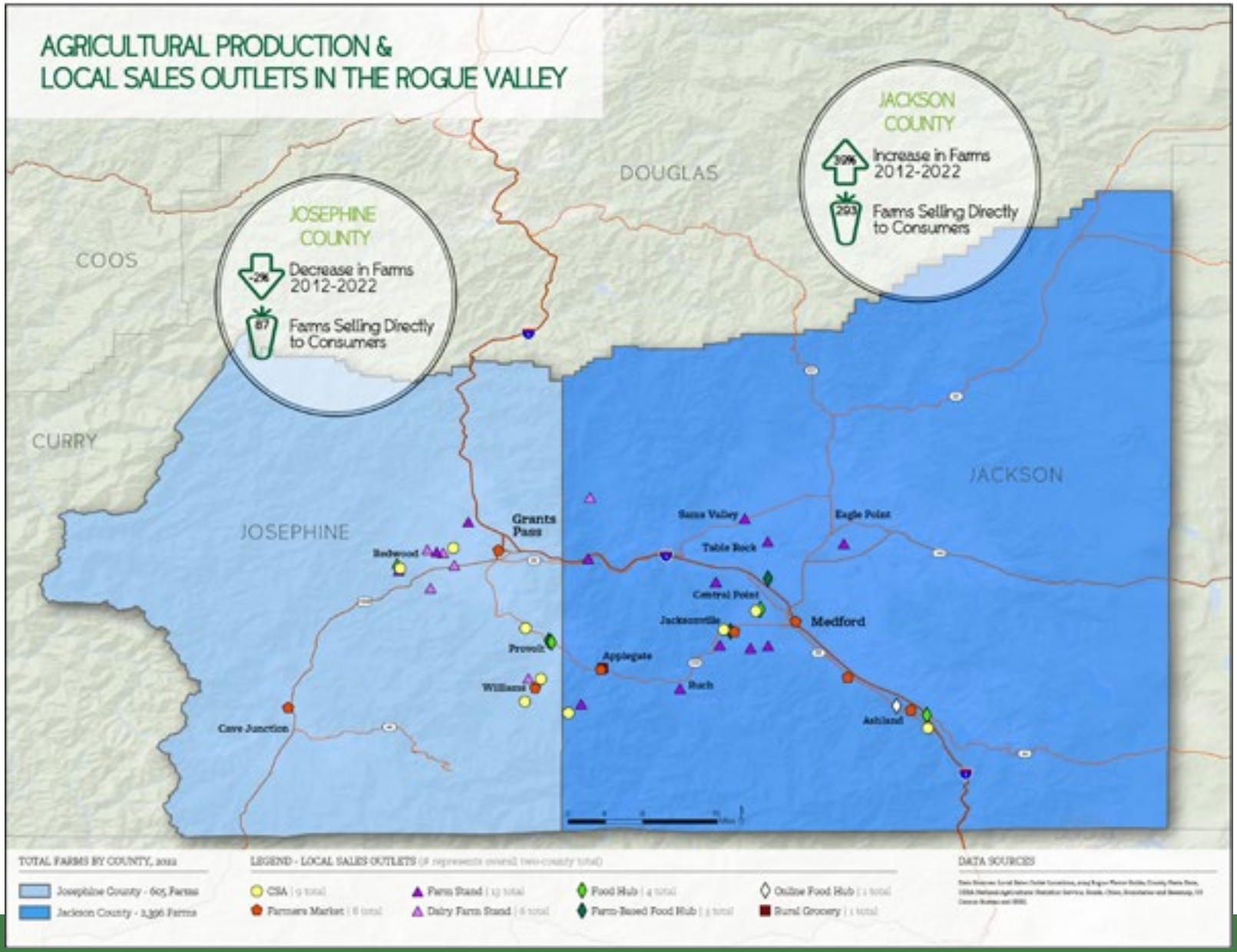
The region's commitment to expanding access to local proteins has grown significantly in recent years. Through innovative programs like Protein Bucks at local farmers markets, which match SNAP/DUFB transactions with an additional $10–12 for animal protein purchases, the community is actively working to make local meat, poultry, and eggs more accessible to all residents. AllCare's dedication of $259,659 to this program since 2022 not only supports food access but also strengthens local ranchers and poultry producers, creating a virtuous cycle of community benefit. Looking ahead, the planned USDA-inspected slaughter unit through Rusted Gate Farm promises to further strengthen the local meat supply chain by providing more accessible processing services to area farmers and ranchers, reducing transportation costs, and helping small-scale producers reach more local consumers.

In total, 380 producers in the Rogue Valley generated more than $12 million in direct-to-consumer sales in



2022, with an additional $13 million in sales generated by 129 producers through retail outlets and food hubs. Together, these sales represent 17.6% of all agricultural sales in our region. Our community of nearly 130,000 households across Jackson and Josephine Counties (92,225 and 37,241, respectively) spends an average of $8,183 per year on food, with $5,400 of that spent on food consumed at home. Each household invests about $1,080 annually—or $21 weekly—on fruits and vegetables.

These figures hint at an exciting possibility: **If every household in the Rogue Valley channeled their existing fruit and vegetable budget toward local products, it would generate over $2 million weekly and $137 million annually for our local economy. Even if households only shifted half their produce spending to local sources, we'd see nearly $50 million in annual local sales. Currently, agriculture stands as one of Jackson County's largest economic sectors, generating $105 million in total agricultural sales, with fruits, tree nuts, and berry production contributing $53 million in 2022.**

However, like many communities, we face challenges in realizing this potential. Despite our robust local food system, only 2% of the food consumed by Rogue Valley households is locally grown. Our research reveals several barriers to more widespread local food purchasing. Price remains a primary concern overall, with 24% of survey respondents citing affordability as their top consideration. The urban-rural divide is particularly notable, with 47% of rural residents reporting insufficient healthy food options compared to just 17% in urban areas.

Yet amidst these challenges, we see remarkable resilience and adaptation. A significant portion of our community takes food production into their own hands, with 35% growing their own food and 66% maintaining home gardens. While this shows impressive self-sufficiency, it also highlights food security concerns, as 16% of residents rely on food pantries as a primary food source.

The community's appetite for learning offers hope for the future. Survey results show equal enthusiasm for gardening education (23%), learning to cook healthy meals on a budget (20%), and developing general culinary skills (19%). While social media serves as the primary source of food system information for 57% of respondents, we see opportunities to expand education through trusted community institutions, particularly healthcare providers (currently reaching 14%) and state health services (5%).

Looking ahead, shifting local food consumption from t's current 2% to even 10 or 15% could transform our local economy and strengthen community resilience. The working groups for the Rogue Valley Community Food Assessment are developing action plans to address these opportunities through:

- enhanced consumer education about seasonal availability and local product identification
- improved coordination between producers and retailers
- development of additional food hubs and distribution infrastructure
- expanded support for small and new producers entering retail markets
- innovative programs to address affordability concerns
- investment in local processing infrastructure to support meat and poultry producers
- strengthened connections between healthcare providers and food education
- expansion of successful programs like Protein Bucks that increase access to local foods

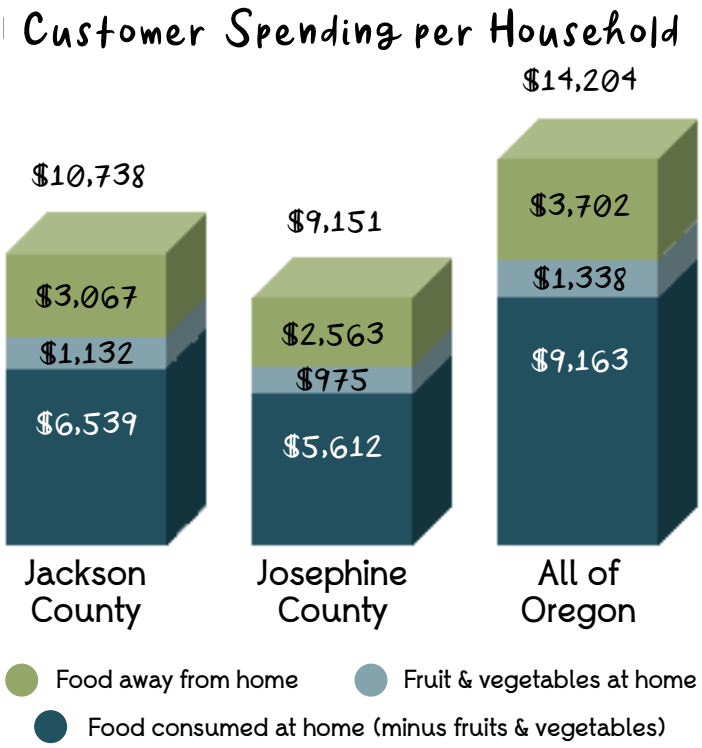
As our assessment shows, the Rogue Valley's food system has strong foundations but significant room for growth. The current landscape reveals both traditional strengths—380 active producers, bustling farmers markets, and thousands of home gardens—and innovative solutions like the Protein Bucks program and emerging food hubs. Increasing local food consumption represents more than economic opportunity; it

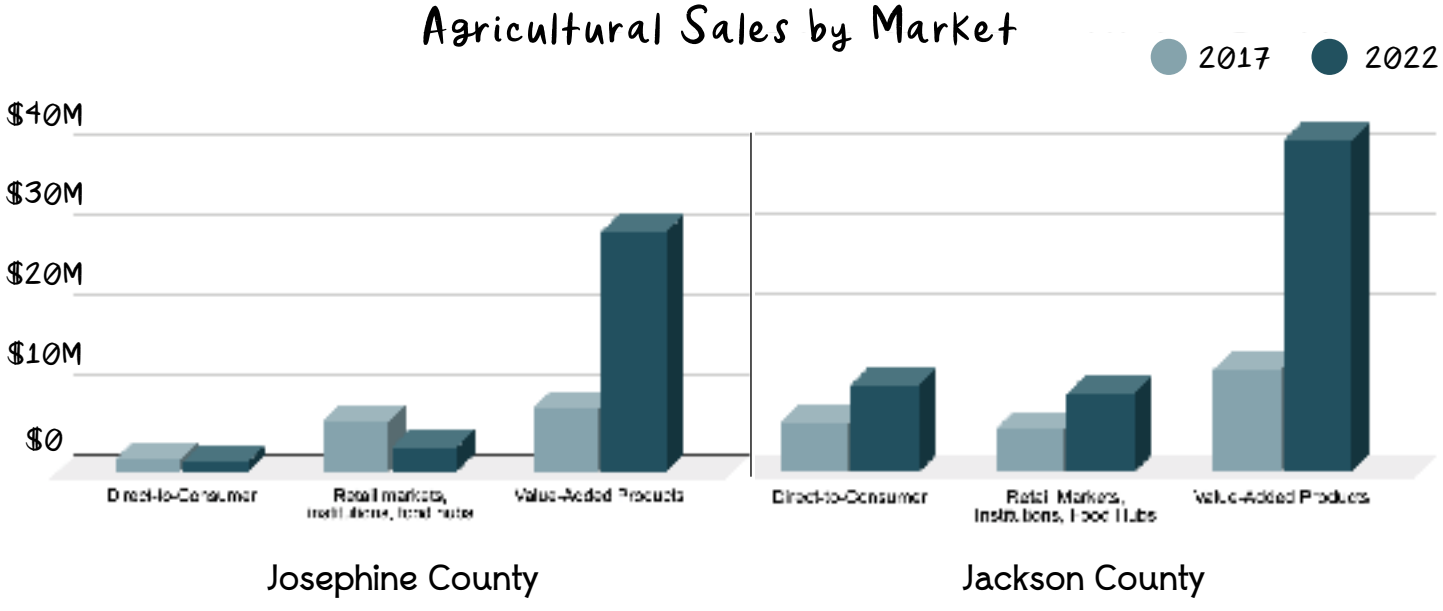
offers a practical path toward a more resilient regional food system. Through continued investment in local infrastructure, education, and accessibility programs, the Rogue Valley can build on its agricultural heritage while adapting to meet contemporary challenges. Our community has demonstrated remarkable adaptability during recent crises, suggesting that we have the tools and determination needed to create a food system that works for everyone—from farmers and ranchers to families across our urban and rural communities.

Shifting local food consumption from t's current 2% to even 10 or 15% could transform our local economy and strengthen community resilience.

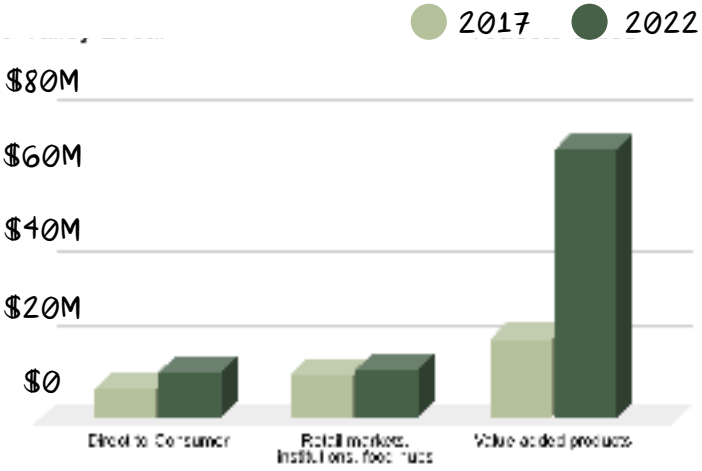
Key Findings

- Rogue Valley residents on average spent considerably less per household on food ($8,138) in 2021 compared to the state average ($11,840).
- Sixty-six percent of total food spending by Rogue Valley households is on food consumed at home, and of that food consumed at home, 20% is spent on fruits and vegetables. ***See graph.***
- Retail and food hub institutional sales occur via 4.3% of the farms (129 farms) and represent nearly 10% of the total agricultural sales for the region.
- Direct-to-consumer sales (DTC) increased by 80% in Jackson County (more than double the state average of 38%) , while Josephine County DTC decreased by 11%. Retail/food hub institutional sales jumped by 81% in Jackson County but declined by 51% in Josephine County. The state's retail/food hub institutional sales jumped by 110% in that same time period. ***See graph.***
- Value-added sales in the Rogue Valley have tripled since 2017 ($20 million in 2017 to $71 million in 2022), compared to the slight decline in value-added sales for the state of Oregon (-5% change). There were 213 farms in the Rogue Valley that reported value-added sales, totaling more than $71 million and representing 29% of the state's total value-added sales. ***See graph.***
- Farm-to-school sales have played a significant role in increasing institutional sales in the region. Since 2022, ACCESS, Rogue Food Unites, and other food





Rogue Valley Local Food and Value-Added Products Sales



bank organizations have increased the institutional purchasing of local food even more.

- The strength of the local food system and its importance in community resilience became clear during the pandemic, when Rogue Valley Farm to School secured a $1 million USDA contract to purchase fresh fruits and vegetables via the Fry Family Farm Food Hub, distributing 2,000 boxes of organic produce to families every week during the height of the pandemic. This infrastructure was then utilized to launch Rogue Food Unites in response to the Almeda Fire, a program that has grown to become a vital source of local produce for families throughout the Rogue Valley and beyond.
- A significant portion of Rogue Valley residents rely on growing their own food and/or food pantries as their source of food, with 35% of the survey respondents saying they grow some of their own food and 16% of the respondents listing food pantries as one of their primary sources of food.
- Food affordability is a big concern.
- Strength of consumer awareness and gardening skills.
- Opportunity for food as medicine work (few people learning about food through healthcare).
- Rural people are at risk for more food insecurity.

5.2 Sector Facts

Consumer Spending

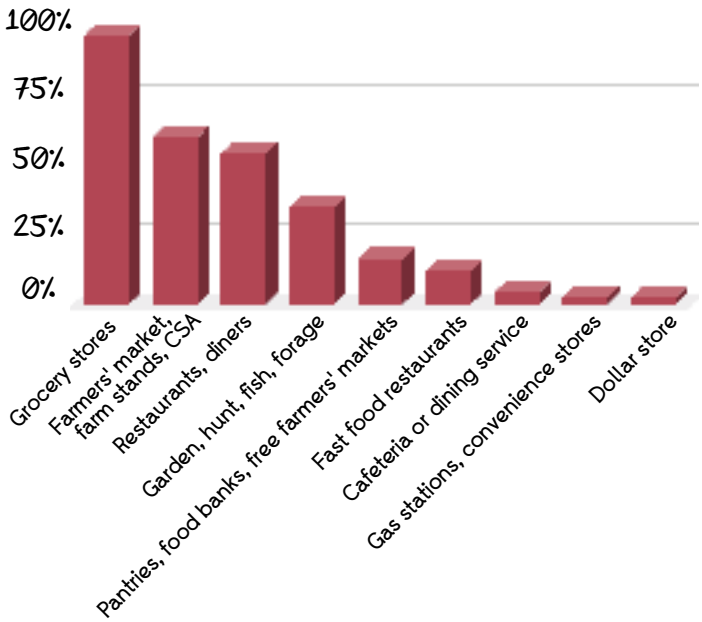
- On average, Rogue Valley residents spent $8,183 per household on food in 2021, which is approximately 11% of their total consumer spending. This is considerably less than the state average spent on food per household ($11,840).[1]
- Sixty-six percent of total food spending is on food consumed at home, and of that food consumed at home, only 20% is spent on fruits and vegetables.[2] *See chart.*

Local food sales (2022)[3]

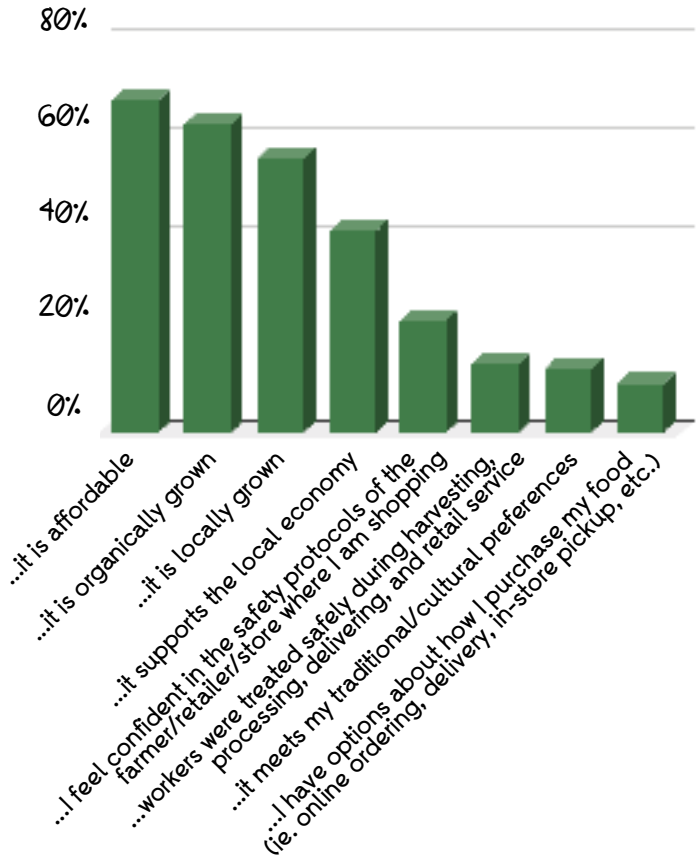
Local food sales is defined as a locally or regionally produced agricultural food product that is transported less than 400 miles or within the state it is produced (farms selling direct-to-consumer and farms with retail/food hub institutional sales).

- There are 380 farms (12.7% of farms) that sell direct-to-consumer in the Rogue Valley. This totals $12,327,000 in sales, which is 8.6% of the region's total agricultural sales.
- There are 129 farms (4.3% of farms) with retail and food hub institutional sales, which totals $12,938,000 in sales. This makes up 9% of the region's total agricultural sales.
- Between 2017 and 2022, direct-to-consumer sales

Top Places People Buy Food



When shopping for food and deciding what to buy, which of the following go into your decision making? Select the top three that apply. Knowing that...



and retail/food hub institutional sales for the region experienced a net increase of 63% and 10%, respectively. Jackson County direct-to-consumer and retail/food hub institutional sales increased by 80% and 81%, respectively, while Josephine County direct-to-consumer and retail/food hub institutional sales decreased by 11% and 51%, respectively. Jackson County's direct-to-consumer sales trends are much higher than the state of Oregon, which also jumped but by only 38%. However, the state's retail/food hub sales jumped by 110% in that same time period. *See chart.*

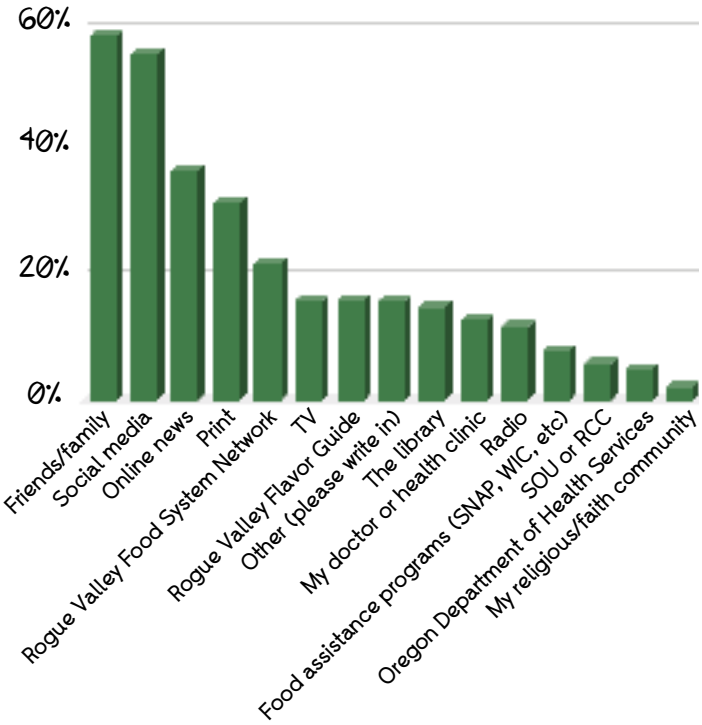
Value-Added Sales (2022)[4]

- Two hundred thirteen farms (13% of farms) report selling value-added products. This makes up $71,312,000 in sales, which is 29% of Oregon's total value-added sales.
- The Rogue Valley experienced a tripling of value-added sales since 2017 ($20 million in 2017 to $71 million in 2022), compared to the slight decline in value-added sales for the state of Oregon (-5% change).

Farm-to-School Participation and Local Food Spending:

- Local food can be found in school meal programs in the Rogue Valley. As of the 2019 USDA Farm to School Census, there are nine school food authorities serving local food, eight with salad bars serving local food and two with edible gardens. Spending on local foods by these school food authorities is $706,120 (6% of the state total).[5]
- There are ten participating schools receiving local food from seventeen farms:[6]
  - Participating farms:
    - Dauenhauer Cattle; D & B Livestock; Salant Family Ranch; Bee Girl; Ft. Vannoy Farms; Fry Family Farm; Plaisance Ranch; Quail Run Farm; Rogue Valley Farm to School, Fry Family Farm; Rusted Gate; Wandering Roots Farm; Daily Blessings Farm; Marvins Gardens and Cattle Co.; Terra Sol; The Farm at SOU; White Oak farm and education center; Whistling Duck Farm
  - Participating school districts:
    - Boys and Girls Club of the Rogue Valley–Grants Pass; Grants Pass School District; Medford School District; Phoenix Talent

What sources do you use to learn about food (i.e., nutrition classes, diet info, cooking skills, gardening) in Jackson or Josephine County? Select your top five.



School District; Southern Oregon Head Start; Sunny Wolf Charter School; Three Rivers School District; Ashland School District; Central Point School District; Kids Unlimited Academy

- The Rogue Valley received $256,352 to spend on local and Oregon products starting in August 2021 through July 2023 through the Farm to CNP Noncompetitive Reimbursement Grant. The region received an extra $47,400 through the Farm to CNP Competitive Reimbursement Grant. By July 2023, $217,993.28 was spent on local and Oregon products.[7]
- Spending on local food through ACCESS, the largest food bank, will total $140,000 in 2024.
- Rogue Food Unites spent $1.1 million on local produce through the Fry Family Food Hub in 2023–24.

I would like to learn more about...

5.3 Survey and Focus Group Findings

RV Community Survey 2024 Results

- Where community members buy and make decisions about food: Thirty-five percent of community members report growing their own food; 16% report food pantries as a top place they get food; and 2-3% of community members are buying groceries from convenience stores or gas stations as a primary food source. Affordability was the top factor when deciding what food to buy for 24% of respondents (affordability was the top concern out of all factors) and 21% of community respondents said their community does not have sufficient options for healthy eating. Rural respondents were much more likely (47% vs 17%) to report insufficient healthy food options than those living in urban centers. ***See graphs.***
- Food system participation: There is high involvement in gardening and growing food activities in the region, 66% of community respondents reporting having a garden and knowing how to grow their own food.
- News sources: Social media is the top news source community members use to learn about food in the Rogue Valley, with 57% selecting this as a primary news source, followed by online news, print, and the Rogue Valley Food System Network. Only 14% report learning about food through their doctor and 5% through the Oregon Department of Health. ***See graph.***
- Community members are equally interested in learning more about gardening and growing their own food, how to cook healthy meals on a budget, and general cooking skills. ***See graph.***

5.4 Trends and Challenges

- The region has seen a sharp increase in local food system activity in the last decade. While Rogue Valley residents spend less on food annually AND less on vegetables compared to averages across the state, local food sales are on the rise within the region. ***See graph.***
- The Rogue Valley makes up almost a third of all of Oregon's value-added sales, a number that tripled in the last decade. This is an indicator of strong local agricultural business activity.

- Food affordability is a major concern for community members. However, there is high consumer awareness of local agriculture's importance. ***See graph.***
- There is also high general knowledge around sustainable growing practices and over two-thirds of community respondents report having their own garden.
- Rural people are at risk for more food insecurity and are more likely to report a lack of healthy eating options nearby. There is an opportunity for food-as-medicine work through healthcare partners as there are few people reporting about learning about food through their primary care or healthcare channels.

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1 U.S. Census Business Builder, "Consumer Spending," 2021, accessed February 27, 2024.

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7 Ibid.

Community Highlight: Rogue Valley Growers and Crafters Market

"What makes the farmers market such a special place is that you are actually creating community around food."

Bryant Terry (Chef, Food Justice Activist and James Beard Foundation Leadership Award Winner)

Since its founding in 1987, the Rogue Valley Growers and Crafters Market (RVGCM) has become a cornerstone of the Southern Oregon community, creating opportunities for local farmers, artisans, and the public to connect, support, and thrive together. With a mission to offer fresh, seasonally grown produce and locally crafted goods, the market has become a vital hub for more than 100 vendors and tens of thousands of customers each year.

What began as a small farmers market in downtown Medford has grown into one of the largest outdoor markets in the region, with additional locations in both Ashland and Phoenix. RVGCM is proud to showcase the best of what Southern Oregon has to offer—from heirloom vegetables and fresh herbs to handmade pottery and locally raised meats, artisan cheeses and eggs. Each market day serves as a celebration of the vibrant agriculture and creative spirit that defines our region.

In 2019, RVGCM introduced new programs to support both farmers and consumers, such as the Double Up Food Bucks Program, which helps Oregonians further their Supplemental Nutrition Assistance Program (SNAP) benefits at the market! This coupled with our Protein Match Program allows program recipients to turn $20 of benefits into $50 of groceries up to 3 times per week! This is a triple win as it supports our most venerable community members, offers much needed financial support to farmers, ranchers and small business owners and stimulates the local economy by keeping dollars spent locally. Additionally, RVGCM continues to offer educational workshops and cooking demonstrations, further strengthening the connection between the food we grow and the meals we share.

By supporting the local economy and providing access to healthy, locally grown food, the market plays an essential role in the region's agricultural resilience. RVGCM also promotes sustainability by encouraging waste reduction, recycling, and food scrap collection efforts at both our Tuesday Ashland and Thursday Medford markets. As the market continues to grow and evolve, it remains dedicated to its roots—fostering community and enhancing food security for Southern Oregon families.

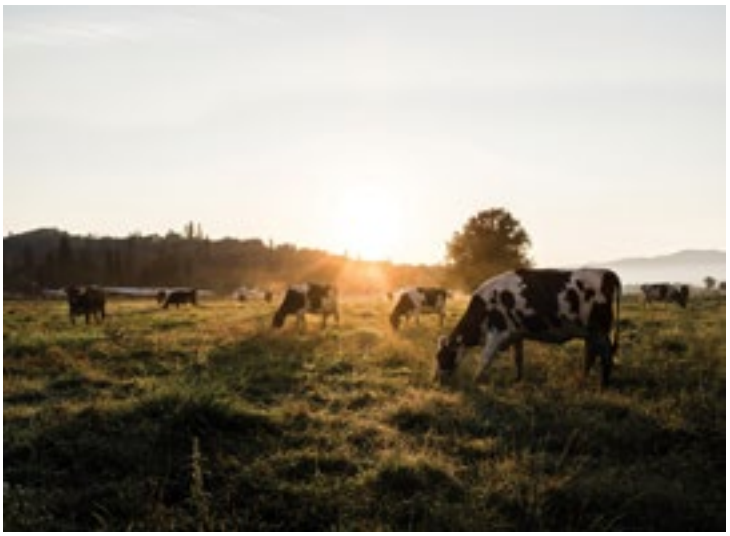
- Nickole Schulz, Manager of Operation

Community Highlight: Rogue Creamery

Rogue Creamery has been crafting artisan cheese in Oregon's Rogue River Valley since 1933. What began as a small cooperative creamery has evolved into an internationally-recognized maker of organic blue and cheddar-style cheeses. Inspired by the natural beauty and flavors of the region, Rogue Creamery's award-winning cheeses reflect a dedication to craftsmanship and tradition.

The creamery's commitment extends beyond cheesemaking. Rogue Creamery operates its own USDA Certified Organic dairy farm, where cows graze on lush pastures near the Rogue River. This focus on sustainable and ethical farming practices is part of their larger mission to, "lead the way to better cheese." In 2014, Rogue Creamery became Oregon's first Certified B Corporation, joining a global community of businesses dedicated to social, economic, and environmental responsibility.

From its signature Oregon Blue cheese, one of the very first cave-aged blue cheeses made West of the Mississippi, to their acclaimed Rogue River Blue cheese – crowned World Champion at the 2019 World Cheese Awards – each Rogue Creamery product embodies the terroir of Southern Oregon and the dedication of the artisans that create it.



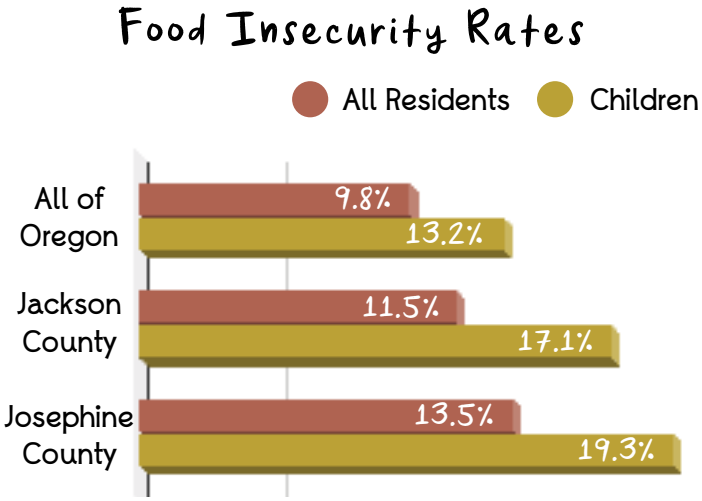
Today, Rogue Creamery balances its commitment to classic cheesemaking with a deep-seated drive to innovate and inspire. Through respect for community, sustainability, and the art of cheesemaking, Rogue Creamery aims to shape the rich agricultural tradition of Southern Oregon.

Food Security, Health & Resiliency

6.1 Overview of Food Security in Rogue Valley and the State

Food security in the Rogue Valley is a complex story of community resilience, innovative partnerships, and persistent challenges. The region faces higher food insecurity rates than the state average of 9.8%, with 11.5% of Jackson County residents and 13.5% of Josephine County residents unsure of their next meal. These statistics become even more alarming when looking at our children—17.1% of children in Jackson County and 19.3% in Josephine County experience food insecurity, significantly exceeding the state average of 13.2%. *See chart.* Behind these numbers are families making difficult choices between food and other basic needs. Food insecurity is defined as not having access to sufficient food, or food of an adequate quality, to meet one's basic needs. Often this is described as not being sure when and from where one's next meal might come.

A robust network of support systems and creative solutions have been created over the last twenty years in the Rogue Valley to address the pervasive food insecurity of our region. Organizations like ACCESS and Rogue Food Unites, city-focused food projects also known as the "green bag programs," and numerous food pantries are working to bridge gaps in food access. Rogue Valley Farm to School works with participating schools to bring locally grown produce and proteins to children while supporting gardening and food literacy programs. School districts have ensured children receive nutritious meals, with 57% of Jackson County

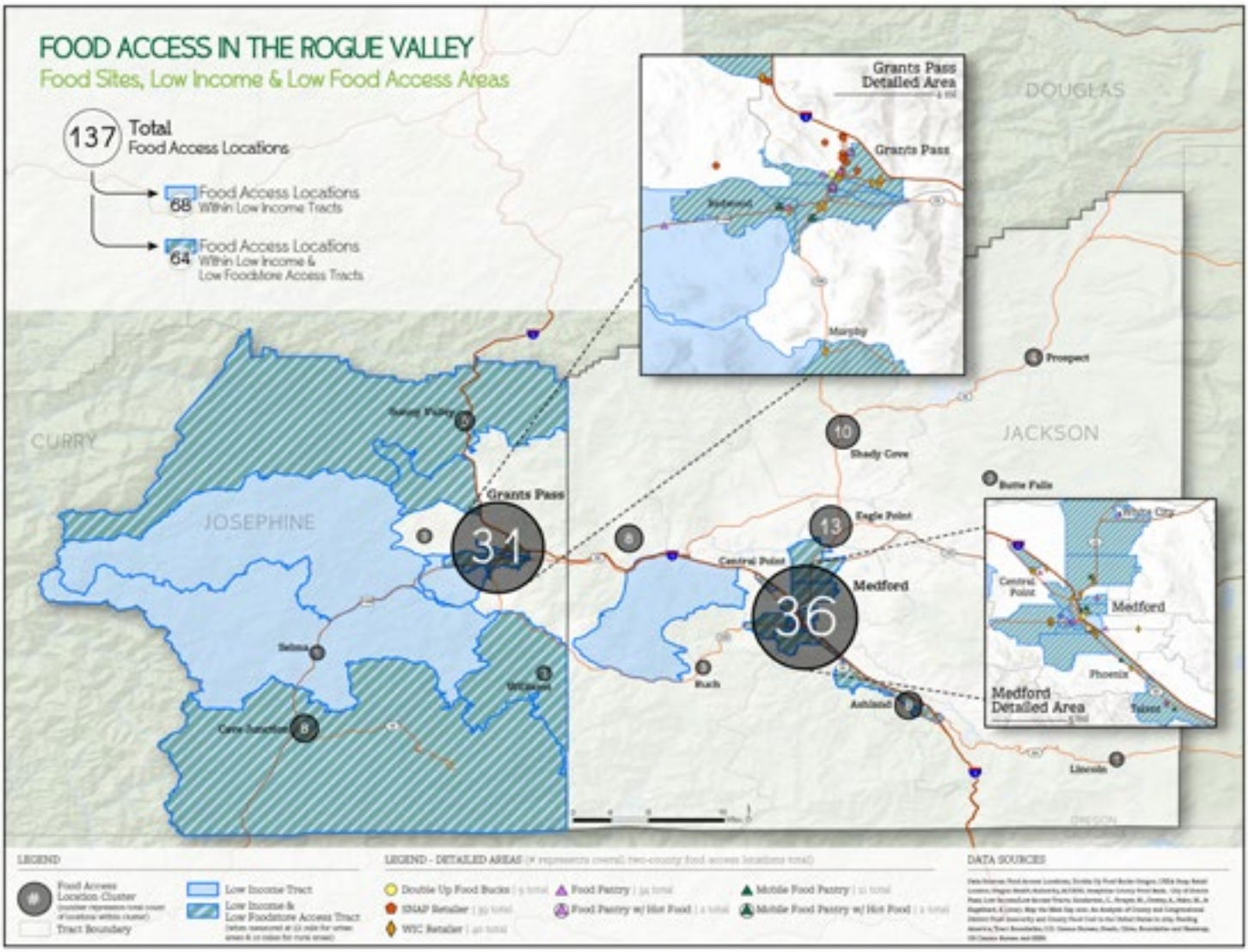


and 59% of Josephine County students eligible for free and reduced-price meals. However, these meals often don't take into account seasonality, local availability, and cultural relevance. Meals are often simple "reheat and serve" as opposed to adaptable from scratch cooking. In addition, programs such as ACCESS's Rogue Powerpack weekend backpack program helps to bridge the weekend food gap for elementary aged children who rely on school meals during the week. These kid-friendly easy to prepare meals and snacks are often the difference to some families between having enough for everyone at home to eat and going hungry over the weekend. Programs like Double Up Food Bucks and Protein Bucks, supported by state funding and healthcare partners AllCare and Jackson Care Connect, help stretch food dollars at farmers markets and grocery stores, making fresh, local produce more accessible to families using SNAP benefits.

The human infrastructure supporting food security is as vital as the programs themselves. From food bank volunteers to school nutrition staff, healthcare providers to farmers market managers, these individuals are creating the connections that help food reach those who need it most. Their work goes beyond simply distributing food—they build relationships, understand cultural needs, and create dignified experiences for community members accessing food assistance.

Challenges persist, particularly in rural areas where transportation barriers and limited grocery store access mean getting to the grocery store is often a forty-mile round trip. About 6% of Jackson County residents and 9% of Josephine County residents live in "food deserts," higher than the state average of 5%. The region also faces a significant "SNAP gap," with over 36,000 residents eligible for but not enrolled in SNAP benefits. Eligible residents often don't enroll in SNAP benefits due to a combination of knowledge gaps (not realizing they qualify), practical barriers (complex paperwork, limited office hours, and technology challenges), and social factors (stigma and privacy concerns). Additionally, many face systemic obstacles like transportation issues or work scheduling conflicts, while others may avoid enrolling due to misconceptions about the program or concerns about immigration status. Language barriers and limited awareness of the application process further contribute to this gap between eligibility and enrollment. Furthermore, the current SNAP qualification criteria do not accurately reflect the true food gap between incomes and food needs, while expanding these criteria presents significant funding challenges as more people could potentially enroll. Feedback from food pantry clients who are enrolled in SNAP consistently indicates that their monthly benefits are insufficient to fully meet their household food needs. While Jackson and Josephine Counties show higher SNAP utilization rates compared to the state average, there remains a substantial enrollment gap, suggesting that SNAP participation rates could and should be even higher if all eligible residents who could benefit from the program were successfully enrolled.

However, innovative solutions continue to emerge from these challenges. Community surveys reveal a strong spirit of mutual aid, with 64% of respondents reporting they provided groceries to others in need over the past year. Local organizations are developing new approaches to food access, from mobile pantries reaching remote areas to culturally specific food boxes serving diverse communities, weekend backpack programs for elementary aged students, and no-barrier farmers markets. Healthcare providers increasingly recognize food as medicine, pioneering programs that



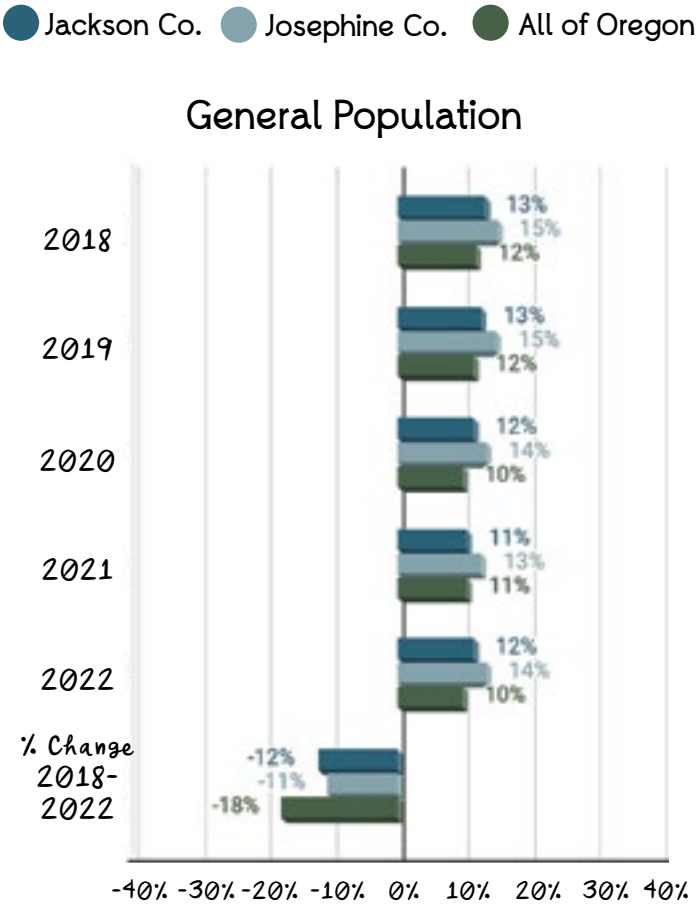
connect patients with nutritious food resources.

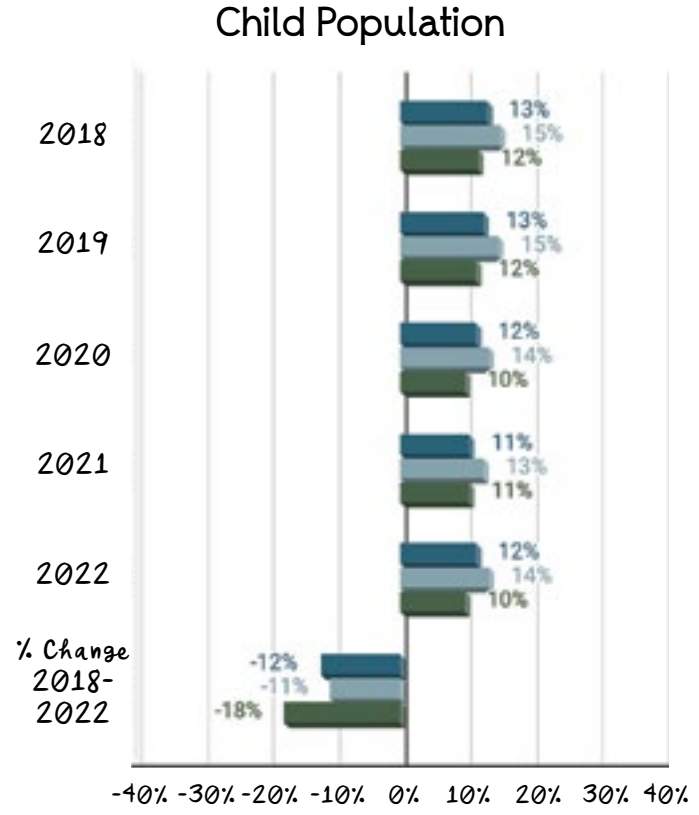
The path toward greater food security in the Rogue Valley requires continued collaboration, innovation, and commitment to serving all community members with dignity. This will look different throughout the food system but consistently calls us to bring the community to the table in decisions around food. It asks us to center our work on the choice people have in the foods they eat and the complexities that surround that choice—cost, transportation, education, and the ability to prepare foods. While the challenges are significant, the region's demonstrated ability to forge strong partnerships and adapt to changing needs provides a strong foundation for building a more food-secure future. By weaving together healthcare, agriculture, education, community support, and forward-thinking policy, we're creating a food system that does more than feed people—it nourishes entire communities. Every mobile pantry, every farm-to-school program, every healthcare provider who recognizes food as medicine represents a thread in a larger tapestry of community healing and hope. As we face ongoing challenges, the Rogue Valley continues to demonstrate that when we work together, prioritize local connections, and approach food as a fundamental human right, we build a more resilient, healthy, and compassionate future for all our residents. The path toward greater food security in the Rogue Valley requires continued collaboration, innovation, and commitment to serving all community members with dignity. While the challenges are significant, the region's demonstrated ability to forge strong partnerships and adapt to changing needs provides a strong foundation for building a more food-secure future.

Key Findings

- **Food insecurity rates are higher than the state average.** Jackson County (11.5%) and Josephine County (13.5%) exceed Oregon's rate of 9.8%. Child food insecurity is even more severe, with 17.1% of children in Jackson and 19.3% in Josephine experiencing food insecurity (state average: 13.2%). ***See graph.***
- **Children and K–12 students face greater food insecurity risks.** More students qualify for free and reduced-price meals in the Rogue Valley (57% in Jackson, 59% in Josephine) than the state average (46%). Expanding farm-to-school programs could help address this need.
- **The SNAP gap is significant.** More than 36,000 Rogue Valley residents qualify for SNAP but are not enrolled, accounting for 12% of the region's population. Barriers include lack of awareness, stigma, and logistical challenges.
- Pandemic-related assistance temporarily reduced food insecurity, but rates are climbing again. The end of emergency SNAP allotments and rising food costs have reversed progress made from 2018 to 2022.
- **Food affordability is a major concern.** Over one-third of residents worry about the cost of groceries, and between 11% and 22% of those who don't qualify for public assistance still experience food insecurity.
- **Transportation is a barrier to food access.** Seventeen percent of residents live more than 10 miles

Food Insecurity Rates Over Time (2018-2022)





from a grocery store, and 10% live over 20 miles away. Time constraints and lack of fresh food options were also cited as challenges.

- Emergency food response needs improvement. Community discussions highlight the need for better coordination and language accessibility for emergency food resources.
- Mutual aid is strong. Sixty-five percent of community survey respondents reported providing groceries to others in need over the past year. ***See graph.***
- Local food infrastructure plays a crucial role in resilience. Programs like *Double Up Food Bucks, Protein Bucks*, and mobile food pantries are expanding access to fresh, local food.
- Healthcare integration is an emerging opportunity. More work is needed to connect food security programs with healthcare providers and "food as medicine" initiatives.
- Rural residents are at higher risk of food insecurity. Limited grocery access, long travel distances, and higher poverty rates contribute to food access challenges.

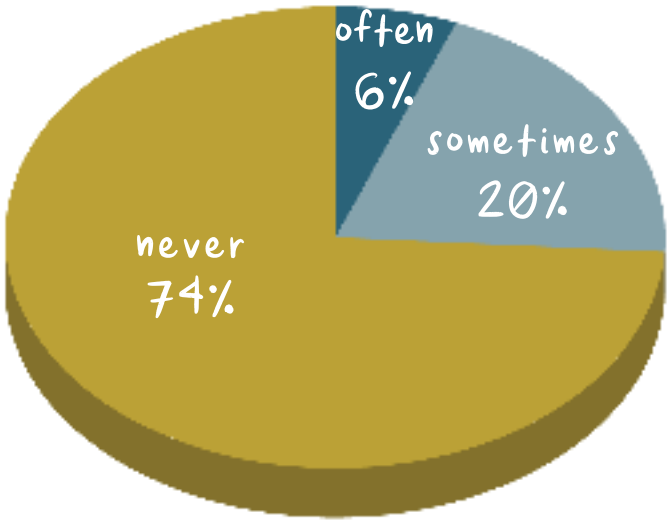
> "Every mobile pantry, every farm-to-school program, every healthcare provider who recognizes food as medicine represents a thread in a larger tapestry of community healing and hope."

6.2 Sector Facts

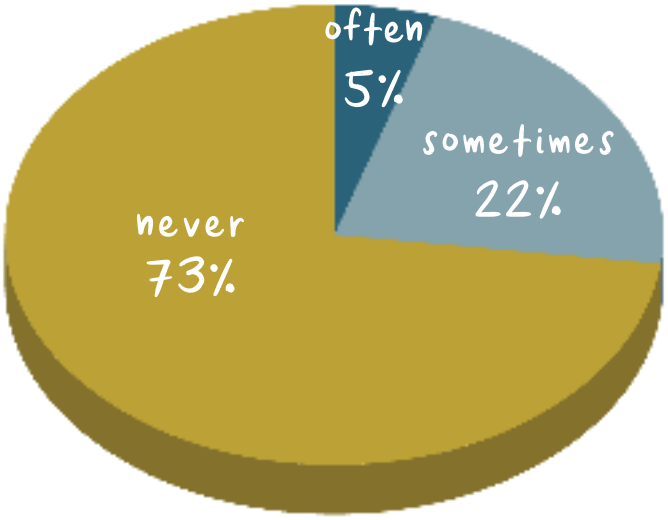
Health

- The Rogue Valley is faring worse than the average county in Oregon for both health outcomes and health factors.[1]
  - The most common chronic diseases in both Jackson and Josephine Counties and the state were disability, arthritis, asthma, diabetes, and cancer.[2]
  - Just over one out of seven adults in both counties had asthma. This is higher than the state rate.
  - The mortality rate is higher in both counties compared to the state and has been increasing

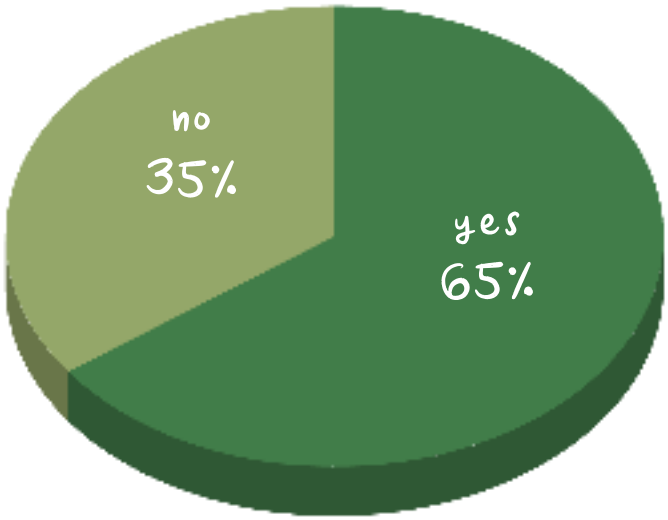
Within the past 12 months, the food I bought ran out, and I didn't have money to get more.



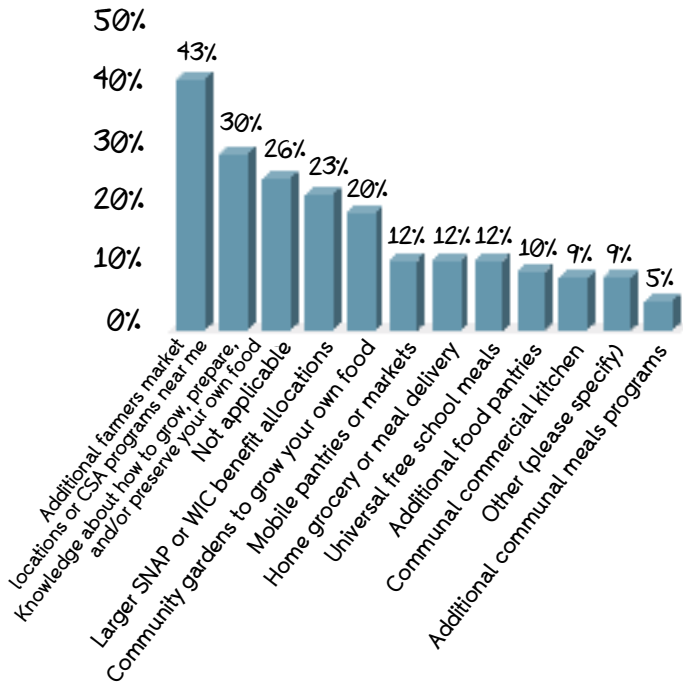
In the last 12 months, did you or other adults in your household ever cut the size of your meals or skip meals because there wasn't enough money for food?



In the last 12 months, did you or other adults in your household ever provide groceries to others?



What community services would help you access food more easily? Select your top three.



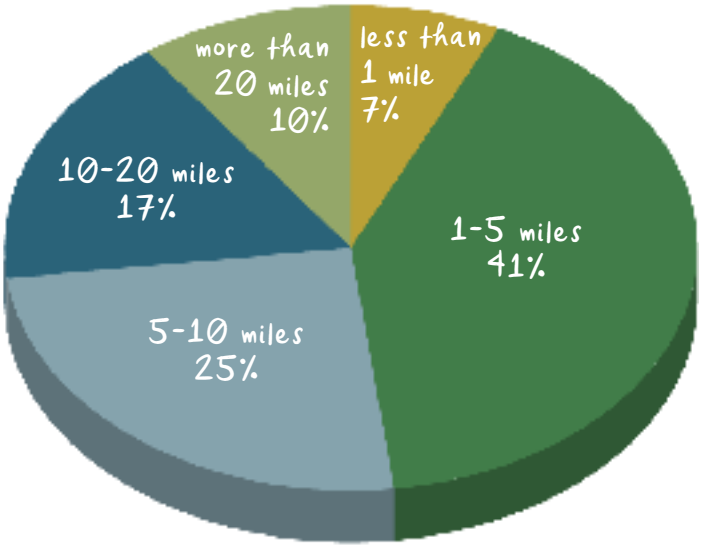
in recent years.[3]

- Both counties have a higher prevalence of chronic diseases in every category compared to the state average. Josephine County has a much higher prevalence of disability, asthma, and diabetes when compared to the state.[4]
- **In both counties nearly one in five students in all grades included in the Oregon Student Health Survey (includes 6th, 8th, and 11th grades) did not have enough to eat for at least one day of the week.[5]**
- Across both counties and the state, recommended fruit and vegetable intake and recommended sixty minutes of physical activity decreased with grade level.[6]

- Top ten health concerns ranked by 1,634 Rogue Valley community members (76% of respondents live in Jackson County; 24% of respondents live in Josephine County):[7]
  1. Cost of living (42%)
  2. Air quality (35%)
  3. Affordable housing (30%)
  4. Dental/oral health (26%)
  5. Public safety (26%)
  6. Accessing health care (26%)
  7. COVID-19 (25%)
  8. Mental health issues (25%)
  9. Obesity/overweight (23%)
  10. Asthma or COPD (23%)
    - One in three respondents selected air quality (wildfire smoke, pollution) among their top health concerns. Jackson and Josephine Counties experienced higher than average measures of fine particulate matter (19.1 and 12.4 µg/m^3 , respectively) than both the national standard (12.0 µg/m^3), and the state of Oregon (12.0 µg/m^3) in 2022.[8]
- Top food concerns:[9]
  - Thirty-five percent of the Rogue Valley community is worried about having enough money to pay for groceries.
  - One in five people in the Rogue Valley community highlighted the availability of healthy food as a challenge.
  - Twenty-one percent of respondents needed, but went without, food services such as food stamps, food pantries and nutrition education.

Rogue Valley has a slightly lower Food Environment Index (2019 and 2021) than the state as a whole, with Josephine County faring worse than the state and the nation.[10] The Food Environment Index (out of a possible 10, which includes access to healthy foods and food insecurity) is an index of factors that contribute to a healthy food environment, from 0 (worst) to 10 (best): JaCo = 8.0 | JoCo = 7.2 | Oregon = 8.1| U.S. = 7.7

How far do you travel to get food/groceries?



Food Security

- **Food insecurity rates for the overall population in Jackson County (11.5%) and Josephine County (13.5%) are considerably higher than the state average (9.8%).**

- **Food insecurity is noticeably higher among children:** 17.1% of children in Jackson County and 19.3% of children in Josephine County are food insecure, rates much higher than the state child rate (13.2%). These data indicate that an overwhelming number of adults and children in the Rogue Valley region do not have enough food to eat and do not know where their next meal will come from.[11] According to a comprehensive longitudinal study examining kindergarten through third-grade students, food insecurity was associated with significant developmental consequences for children, including impaired academic performance, weight gain variations, and social skills challenges, with 17.1% of households reporting at least one indicator of food insecurity.[12]
- Rates of food insecurity were decreasing consistently between 2018 and 2021; however, the ending of pandemic-related food assistance has reversed this trend with an uptick in food insecurity rates.[13]
- Food deserts (low income and low grocery store access): The region has a higher percent of the population in food deserts than the state (Jackson County at 6%, Josephine County at 9% and Oregon at 5%).[14]
- SNAP participation:[15]
  - SNAP participation rates are higher in the Rogue Valley, particularly in Josephine County, compared to the state rate. Below are the number of average monthly SNAP participants and the percent of households receiving SNAP benefits:
    - JaCo = 45,948 (17.9%) | JoCo = 24,125 (23.2%) | Oregon = 750,294 (16.1%)
- SNAP gap:[16]
  - **In Jackson and Josephine Counties, 36,670 people are income-eligible for SNAP but are not enrolled to receive benefits. This is 12% of the total Rogue Valley population.**
  - Twenty-two percent and 11% of people reporting food insecurity in Jackson and Josephine Counties, respectively, do not qualify for SNAP benefits (state of Oregon: 25%).
  - Nineteen percent and 14% of children from food insecure households in Jackson and Josephine Counties, respectively, do not qualify for SNAP benefits (state of Oregon: 20%).
  - This means that individuals who do not qualify for or enroll in assistance programs depend on charitable and community resources to meet their nutritional needs.
- There is a higher percentage of K–12 students in

the Rogue Valley that are eligible for free and reduced price meals than compared to the statewide average.[17] This suggests that many of the students in the region face economic hardship.

- JaCo = 57% | JoCo = 59% | Oregon = 46%

6.3 Survey and Focus Group Findings

2023 Food Summit Roundtable: Food Access and Food Insecurity; Nutrition; Advocacy Outreach and Education

- Challenges that emerged from the roundtable discussion include the need for more funding, the need for more grant support, and existing language barriers for accessibility. Opportunities include federal funding support, advocacy and increasing connections to BIPOC leaders, farm-to-school coordinators, grant writers, and increasing food distribution.

2023 Food Summit Roundtable: Emergency Food Resources

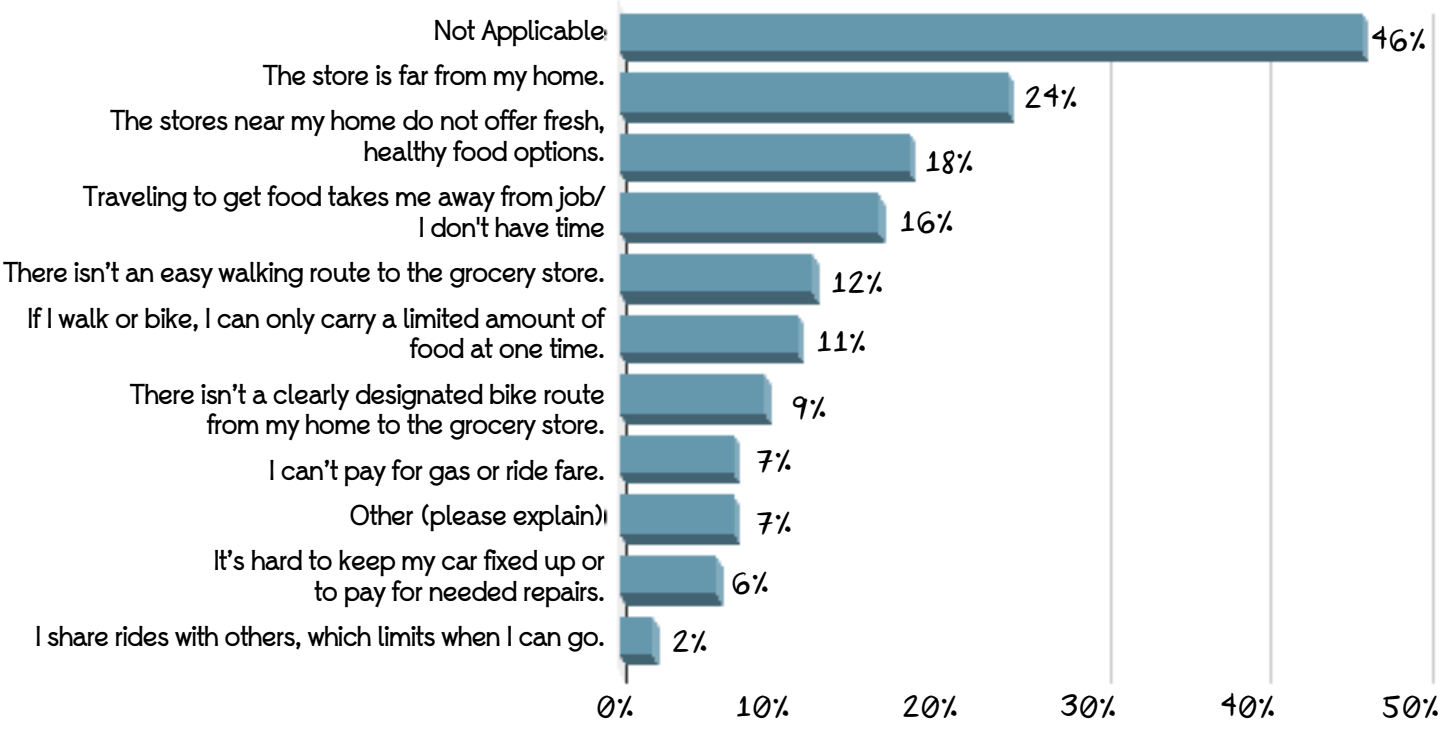
- Challenges that emerged from roundtable discussions include the inadequate emergency response plans that exist today and the lack of language accessibility of emergency communications.
- Opportunities include Bill 29-90 and the idea of "resiliency hubs" in order to coordinate emergency response and be prepared with community resources in the future.

2022 interviews through United Way: Ideas Regarding Food Deserts in Jackson County

RV Community Survey 2024 Results:

- Food security: Over a quarter of community members who took the survey reported some sort of food insecurity.
- Helping out food insecure community members): 64% of community survey respondents reported providing groceries to others in the last year.
- Community services to help increase food access: Community members reported wanting more farmers market locations and CSA sites, more knowledge about how to grow their own food, and larger public benefit allotments to aid in food security. Community members also reported accessing over a dozen different free food sites and pantries and that their top challenge accessing food at these sites was the timing of services offered/inconvenient hours.
- Distance to a grocery store: 17% of community members report living over ten miles from a grocery store, and 10% are more than twenty miles from a store. The top challenges in getting groceries were the distance to the store, lack of healthy/fresh options, lack of time to grocery shop, and inability to walk to the store.

What are some challenges you experience when traveling to get food/groceries? Check all that apply.



6.4 Trends and Challenges

- **The Rogue Valley is faring worse than the state for both health outcomes and health factors,** with higher rates of asthma and diet-related diseases than state averages.
- **The Rogue Valley faces higher food insecurity than the state:** Food insecurity rates and SNAP enrollment are higher in the region when compared to state averages. For both the overall population and child populations, Josephine County has higher food insecurity rates than Jackson County.
- **Children and K–12 Students are at higher risk for food insecurity:** There is a higher percentage of K–12 students in the Rogue Valley that are eligible for free and reduced price meals than compared to the statewide average, and food insecurity rates among children are higher than adults. There is an opportunity to increase existing farm-to-school programming to address the food security needs of the K–12 population.
- **Pandemic-related assistance helped food security:** Food insecurity rates decreased notably between 2018 and 2022 in the Rogue Valley, although the decrease was not as pronounced as the state average. There was a jump in food insecurity rates between 2021 and 2022, particularly in the child populations, as the ending of pandemic-related food assistance threatened to slow or halt the positive trend in food security. The ending of the emergency SNAP allotments during the pandemic and rising food costs make it harder for many people to feed themselves and their families.
- **There is a considerable SNAP gap:** There is an opportunity to reach eligible SNAP recipients who are not enrolled in the program, as 12% of Rogue Valley residents qualify for the benefit but are not enrolled.
- **Food affordability is a major concern:** Over a third of residents are worried about the high cost of groceries and the affordability of food. Between 11% and 22% of residents who don't qualify for public assistance report food insecurity, and community members self-reported high rates of food insecurity and worry about food costs.
- **Community members need more transportation options and better food choices at grocery stores:** Community survey respondents reported traveling long distances to get to a grocery store and noted the time it takes to shop or access groceries as a barrier. ***See chart.***
- There is a stated need for more **emergency preparedness coordination** and language accessibility for emergency resources for residents.

6.5 Current Policy Landscape

- New Medicare Nutrition Benefit
- Oregon Food Banks: "Food for All Oregonians" campaign and "School Meals for All" campaign to have free meals in all Oregon schools

Section References

1 University of Wisconsin Population Health Institute, "County Health Rankings & Roadmaps," 2023, accessed April 24, 2024.

2 All in for Health, "Community Health Assessment Jackson and Josephine Counties," 2023, accessed March 13, 2024.

3 Ibid.

4 Ibid.

5 Ibid.

6 Ibid.

7 Ibid.

8 Ibid.

9 Ibid.

10 University of Wisconsin Population Health Institute, "County Health Rankings & Roadmaps," 2023, accessed April 24, 2024.

11 Oregon Hunger Task Force, "County Fact Sheets," Jackson and Josephine Counties, 2023 (reflecting 2022 data), accessed April 24, 2024.

12 Jyoti et al., 2005, *https://www.sciencedirect.com/science/article/pii/S0022316622105109*.

13 Feeding America, "Map the Meal Gap 2023: An Analysis of County and Congressional District Food Insecurity and County Food Cost in the United States in 2021," accessed April 24, 2024.

14 University of Wisconsin Population Health Institute, "County Health Rankings & Roadmaps," 2023, accessed April 24, 2024.

15 Oregon Hunger Task Force, "County Fact Sheets," Jackson and Josephine Counties, 2023 (reflecting 2022 data), accessed April 24, 2024 for the average number of monthly SNAP participants; U.S. Census Bureau, American Community Survey 5-year Estimates Subject Tables "Table S2201. Food Stamps/Supplemental Nutrition Assistance Program (SNAP)," 2022, accessed February 18, 2024 for the percent of households receiving SNAP benefits.

16 Oregon Hunger Task Force, "County Fact Sheets," Jackson and Josephine Counties, 2023 (reflecting 2022 data), accessed April 24, 2024.

17 Ibid.

Community Highlight: Rogue Valley Farm to School

Rogue Valley Farm to School (RVF2S) launched the Digging Deeper School Partnership Program 2018 as a targeted effort to support a culture of health and project-based learning in school communities. They work with schools to identify a focused grade(s); then RVF2S educators offer a layered approach of program delivery to ensure that hands-on learning in the garden is intertwined in classroom subjects and the cafeteria to give students a rich, meaningful educational experience.

The program includes weekly garden classes to school-identified grades, bringing real-life applications to all core subjects, while teaching students the practical skills necessary for making healthy choices. Together, students and staff maintain a healthy garden space to be used as a living classroom and productive growing space. Educators bring a range of topics to garden time, from social justice to poetry, cooking, and history. The garden is also an ideal space for social and emotional learning. Students are building positive relationships with their food and their community. Working together on projects, being outside, tending to living plants, and growing food can build confidence, strengthen communication and teamwork skills, and build resilience.

Each month, RVF2S school-based educators serve samples of a local, seasonal fruit or vegetable to students in their own cafeteria to foster a celebratory culture around trying new foods. After sampling, students vote on what they thought about the new foods. Then, RVF2S works with school food services to ensure that the item is featured on the lunch line throughout the rest of the month. The cafeterias receive standardized recipes, item identifiers, featured farmer posters, nutritional handouts, and more promotional items for their offerings. Local farmers are highlighted and promoted and educational materials that include recipes, nutrition, and information about where the item was sourced are shared with families.

Every partner class attends two Harvest Meal field trips a year to a partnering farm. Farms are staffed with each class's school-based educator, building stronger relationships with students and connecting themes across programs.

This integrated effort to build a culture of health in every school they serve is vital in reinforcing the importance of good food in learning success. As of the 2024–25 school year, they are providing this program for the Phoenix-Talent and Central Point school districts with resources and experience to support other schools in Jackson and Josephine Counties incorporating similar programs.

Community Highlight: Medford Food Project

Medford Food Project is a large, all-volunteer community organization that collects food from donors across the region and delivers that food to twelve different food pantries in our area. The Medford Food Project is just one of five neighborhood "green bag" food projects in Jackson County. Others are in Ashland, Phoenix, Eagle Point, and Josephine County. The neighborhood food project concept began in Ashland in 2010. The Medford Food Project has been in existence since January of 2011. Since that time, they have collected a total of 2.3 million pounds of non-perishable food to food pantries throughout the Medford, Central Point, Jacksonville area. They collect from 26,500 to 32,000 pounds of food every two months. For a good description of the process please see their website at *medfordfoodproject.org.*

Currently they have 158 "neighborhood coordinators" who pick up green bags of food from their neighbors on the second Saturday of every other month. They also have 2,250 food donors who voluntarily fill those bags with non-perishable food items and put those out on their porches for pick-up.

These projects are completely volunteer-operated and go a long way toward keeping food pantry shelves full in our region. We are now starting to see the project replicated in many other places (see the national website at *neighborhoodfoodproject.org.*

Food Waste Management

7.1 Overview of Food Waste in Rogue Valley and the State

According to the Oregon State Public Interest Research Group (OSPIRG), one million tons of food is wasted every year in Oregon, enough to fill garbage trucks lined up on the I-5 from Ashland to Portland three times over. At the same time, 19.3 and 17.1 percent of the children in Josephine and Jackson County, respectively, do not have enough food to eat. The greenhouse gases generated in the production of all this wasted food are significant, and reducing this waste has six to seven times the greenhouse gas (GHG) reduction potential of simply keeping this food waste out of landfills.[1] At the same time, the rescue of nutritious, culturally appropriate surplus food has the potential to address the significant problem of food insecurity in our region. Finally, keeping unavoidable food waste out of landfills prevents generation of methane, a potent GHG, and in a closed loop system, recovers valuable constituents that can be put to work restoring soil health and reducing food production impacts.

> "The state has focused on two strategies: (1) Preventing food waste through education and awareness campaigns in homes and businesses, implementing prevention interventions, and supporting food rescue efforts that redistribute edible food, and (2) Expanding the food collection systems to better cycle inedible food back into the soil via compost or to utilize it as a source of renewable energy via methane digesters for animal feed or other uses."

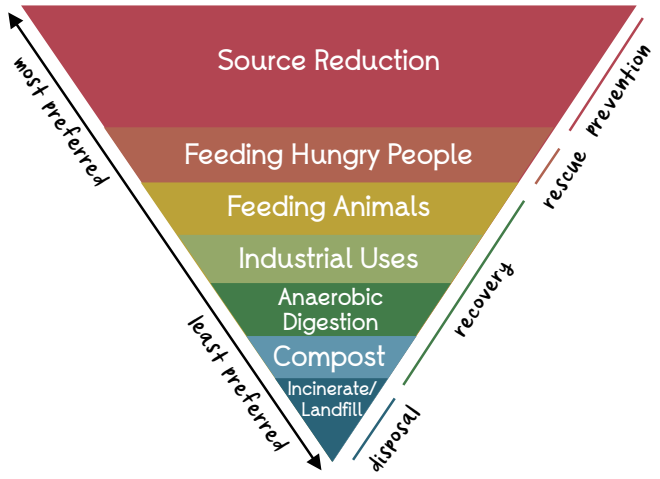
For the past five years, source reduction has been a high priority for Oregon's Department of Environmental Quality (DEQ), the state-level agency in charge of setting the standards for managing solid waste throughout the state. DEQ has developed "Reducing Food Impacts: A Strategic Plan for Oregon" in efforts to meet the "goal of reducing food waste by 50 percent by 2030, to reduce greenhouse gas emissions resulting from such waste, including but not limited to engaging with states and other jurisdictions, industry, food retailers, and brand manufacturers to develop and implement strategies to prevent and recover food waste." (Source: Gov. Brown executive order) The state has focused on two strategies: (1) Pre-

venting food waste through education and awareness campaigns in homes and businesses, implementing prevention interventions, and supporting food rescue efforts that redistribute edible food, and (2) Expanding the food collection systems to better cycle inedible food back into the soil via compost or to utilize it as a source of renewable energy via methane digesters for animal feed or other uses.

While the DEQ is responsible for setting state standards for managing waste, cities and counties are tasked with implementing these strategies at the community level. Currently, neither Jackson nor Josephine Counties have city or county-based food waste collection programs. The closest large-scale composting facility is managed by Recology in Aumsville, near Salem. This facility processes approximately 50,000 tons of yard trimmings and food scraps annually using a state-of-the-art aerated static pile system. This system allows for faster and more efficient processing while reducing odor—a common concern in regards to compost pile locations. Additionally, the facility's quality assurance program ensures a high-quality, consistent product through routine nutrient, metal, and pathogen analysis. Retail product options include compost, mulch, and soil blends. However, one of the barriers to utilizing this facility is the significant distance required to transport waste, which poses logistical and environmental challenges. This situation highlights the need for more localized solutions to create a closed-loop composting system to service the Rogue Valley effectively.

Several homegrown composting efforts have sprung up in the last few years, ranging from paid pickup services to free programs at local farmers markets (see map below). However, the scale at which these programs operate and the number of households participating are not widespread and these efforts alone are not enough to meet the broader food waste and climate goals for the state. One significant benefit of community-scale composting initiatives is the closed-loop system they enable, which strengthens local food systems. Small businesses, like Rogue Produce, exemplify this model by offering both curbside and neighborhood pickup services. They partner directly with local farms, providing food waste that enhances soil health. These farms, in turn, sell their nutrient dense produce through Rogue Produce's online farmers market, completing the cycle. This type of closed-loop system is ideal for building resilient local food systems; however, the major barriers of cost and infrastructure—such as paid subscription models—may be prohibitive for households. Further, the lack of appropriate transport vehicles remains as a key challenge to address in the coming years. Additionally, small businesses that make and sell compost and soil amendment products for on-farm and home use have the potential to serve as future allies in scaling community-level compost initiatives.

"Of all food waste generated by Oregon households, 71% could have been eaten."



Wasted Food Hierarchy, from waste prevention to landfill disposal, with elements higher in the pyramid being economically and environmentally preferable to the lower elements. Source: Oregon Department of Environmental Quality

Key Findings:

Key limiting factors for southern Oregon to meet the goal of reducing food waste by 50% by 2030 are (1) limited infrastructure for large-scale composting, (2) varying levels of community awareness, and (3) regulatory hurdles that restrict certain composting practices. In rural and more populated areas alike, gaps in collection and processing services contribute to logistical obstacles. Additionally, education and outreach efforts are needed to address misconceptions about composting and to increase participation, particularly in more isolated communities.

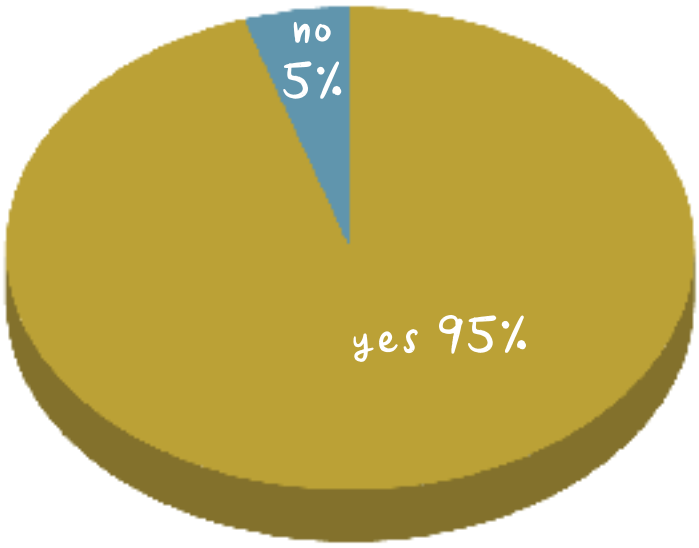
Developing a larger, coordinated effort that includes industrial food waste systems as well as supporting the closed loop entrepreneurial ecosystem at the community level is needed in order to meet the 50% reduction in food waste goal set out by the governor of Oregon and DEQ.

"The greenhouse gas impacts of producing foods purchased by Oregon consumers are almost sixty times higher than the impacts from landfilling wasted food (10.73 million metric tons CO2e in 2015 for production vs. 0.18 million metric tons CO2e from disposal)."[2]

7.2 Sector Facts

- Of all food waste generated by Oregon households, 71% could have been eaten.[3]
- On average, Oregon households throw away 6.3 pounds of food per week (1,643,000 households in 2020) x 52 = 538,246,800 lbs/year in all of Oregon.[4]
- In Jackson County, this means an estimated 563,642 pounds of food per week is being thrown out, equating to 29,309,389 pounds per year.
- In Josephine county 227,732 pounds per week is being thrown out, equating to 11,842,084 pounds per year.
- Food wasted in Jackson and Josephine Counties totals 41,151,473 pounds per year (7.6% of the food wasted in the state of Oregon per year), making the Rogue Valley responsible for 29,423,303 pounds of CO2 emissions (13,346 metric tons) each year. That's the equivalent of using 1,251,691 gallons of gasoline[5] or driving across the country 15,264 times![6]

I currently recycle at home.



The Oregon Wasted Food Study reports top challenges and trends as they relate to municipal composting at scale. They are summarized below:

- The lack of availability of disposal sites and the permits required present barriers to scaling up existing community composting models.
- The measurement and tracking of food waste and management strategies is difficult, making it challenging to see the impact of programs and strategies.

- Challenges for starting city-wide residential pickup programs include high collection fees for residents, and assurance that the compost will stay local is more difficult to come by.
- Community members are passionate about keeping compost local, connecting with local farms, and increasing education and awareness about the importance of sustainable food waste management through neighborhood collaborations. Scaling up is a substantial challenge.

7.3 Survey and Focus Group Findings

2023 Food Summit roundtable: Food Waste Management and Food Recovery

- Roundtable discussions reported the strength of the community's commitment to food waste management and food recovery and the desire for local solutions.
- Challenges that emerged include lack of funding, the need for a viable business model to address food waste, the need for a network to connect all the stakeholders involved in this work, and increased education about the value and importance of food waste management and food recovery.
- Opportunities include building local markets for compost and engaging schools in existing farm-to-school programs. The need for technical assistance and funding was a top priority.

RV Community Survey 2024 Results:

- Composting at home: Over half of community respondents report composting at home and are interested in participating in a city- or county-wide composting program. About a third of community members were unsure if they would participate. However, over half reported being unwilling to pay for this service and one-third would only pay $10/month.
- Recycling at home: 95% of community members report recycling. ***See graph.***

7.4 Trends and Challenges

- The Rogue Valley produces 7.6% of the state's food waste. While community residents report high levels of home composting, indicating strong potential for formal program adoption, affordability remains a key consideration. Identifying viable business models for municipal-level composting continues to be challenging.

- Scaling up regional composting faces significant barriers including regulatory hurdles, lengthy permitting processes, strict environmental standards, zoning restrictions, and community resistance. Infrastructure development and compliance costs pose additional challenges. These obstacles require coordinated policy support, financial investment, and community engagement.
- Residential food scraps collection programs face challenges with high collection fee and support in achieving broad participation. Franchise agreements often favor large-scale operators over community-based programs. Large haulers may struggle with quick implementation due to permitting and logistical challenges.
- While measurement and tracking capabilities are currently limited, opportunities exist through digital tools, partnerships, and grant funding to better assess program effectiveness.
- Community members strongly support keeping compost local, connecting with farms, and increasing education through neighborhood collaborations. Studies from the Institute for Local Self-Reliance demonstrate benefits of community programs over commercial ones, including improved soil health, farm viability, and local job creation. However, scaling these community programs remains challenging.

Section References

1 USEPA's Waste Reduction Model (WARM); *https://www.epa.gov/warm*

2 Oregon Wasted Food Study (2019). *https://www.oregon.gov/deq/mm/Documents/ORWastedFoodMeasStudySummary.pdf*.

3 A. Zanolli, Oregon Department of Environmental Quality, "Oregon Wasted Food Study," 2019, accessed April 30, 2024.

4 Ibid.

5 Calculation of Rogue Valley food waste based on the 6.3 lbs of food wasted per week per Oregon household. Conversion to CO2 equivalents made using desktop calculator, accessed April 30, 2024.

6 Calculated by assuming eighty-two gallons of gas, on average, was required to drive from Los Angeles to New York.

Community Highlight: Rogue Valley Farm to School Composting Pilot

Starting in the fall of 2021, Rogue Valley Farm to School (RVF2S) partnered with students at Talent and Phoenix Elementary Schools and Rogue Compost to start a school composting pilot program. Over the course of this twenty-week program, both schools collected 16 gallons of recoverable fruits, vegetables, grains, and limited dairy products each week, totalling to 320 gallons. These scraps were then brought to Happy Dirt Farm or used to make pig feed in collaboration with Rogue Compost.

One of the biggest challenges for students who participated was learning the difference between meat, grains of bread, fruits, vegetables, and dairy products to effectively sort their waste into the compost bins.

"It seemed simple, any food scraps but meat can go into the bins, but the students had a hard time determining what was on their plate and needed quite a bit of assistance at first. Each garden class helped to make a compost video for showing the rest of the school how it's done, and soon enough, the students got the hang of it." - Abigail Blinn of Rogue Valley Farm to School reported in the Tasting Tables & Composting Midreview

"It seemed simple, any food scraps but meat can go into the bins, but the students had a hard time determining what was on their plate and needed quite a bit of assistance at first. Each garden class helped to make a compost video for showing the rest of the school how it's done, and soon enough, the students got the hang of it."

- Abigail Blinn, BS, RDN, Rogue Valley Farm to School

Food literacy is a challenge across food waste efforts, and inaccurate scrap sorting can be a costly barrier to ensuring food is able to be composted. Providing garden education, including a composting curriculum can be an effective way to connect kids to their food and learn from a young age what a more regenerative food system can look like. Another barrier RVF2S ran into during this pilot was buy-in from staff, particularly custodial and kitchen staff as the burden of composting was greater with these staff members. The program team found that consistent participation was key to building relationships with the staff.

"The team is looking to implement this project every day to get students more used to composting coming spring 2022; however, it will take time getting everyone comfortable doing so."

Source: Tasting Tables & Composting - Midreview

Community Highlight: Community Compost

In 2011, Rogue Produce launched Community Compost, the first residential and commercial food scrap collection service in Southern Oregon. What started as a small-scale effort to connect households with local farms has grown into a robust program that diverts thousands of pounds of food waste from landfills every year. By collecting food scraps from homes, restaurants, schools, and businesses, Rogue Produce helps transform what would be wasted into a vital resource—nutrient-rich compost that improves soil health and provides supplemental feed for farm animals.

The benefits of Community Compost ripple through the local food system. Farmers save time and money on soil amendments, while residents become active participants in regenerative agriculture. This closed-loop approach strengthens the relationship between consumers and food producers, fostering a community-wide commitment to sustainability.

Rogue Produce's impact extends beyond composting. Their Online Farmer's Market brings the cycle full circle by delivering locally grown produce and artisanal foods—such as cheeses, breads, and meats—directly to homes and neighborhood drop sites across the Rogue Valley. Customers who contribute food scraps through Community Compost are often the same individuals supporting small farms by purchasing from the market, reinforcing the interconnectedness of soil, farmers, and food.

By linking composting with local food sales, Rogue Produce has built a model where food waste becomes an asset rather than a burden. With every delivery, whether it's compost to a farm or produce to a home, they are nourishing both the land and the community.

"Full Circle is the best way to describe our work," says the team at Rogue Produce. "We enrich the soil, support local farms, deliver fresh food, and bring it all back to your table."

Community Highlight: Community Compost Coalition

Every year, 30-40% of the U.S. food supply is wasted, costing resources and generating harmful methane emissions in landfills. The Community Compost Coalition transforms food scraps into a valuable asset—enriching soil, reducing waste, and strengthening the local food system.

Through curbside pickups and drop sites in Ashland, Talent, Phoenix, and Medford, the Coalition—comprising Rogue Produce/Community Compost, Ashland Community Composting, and Southern Oregon Food Solutions—collects food scraps from homes, businesses, and community organizations. These scraps are delivered to local farms, where they are composted to nourish the land and support regenerative agriculture.

Beyond collection, the Coalition provides composting guidance and public education to shift perceptions about food waste. Composting isn't just a solution—it's a way to create healthier soil, reduce greenhouse gas emissions, and support local food producers.

With Oregon aiming to cut food waste by 50% by 2030, the Coalition is expanding its efforts, including a new drop-site service at the Medford Farmers Market. Every scrap collected is a step toward a more sustainable future.

To create compost, you need air, water, carbon and nitrogen. And to create community compost, you need community support! Go to *southernoregonfoodsolutions.org/act* to learn more.

Flavia Franco, Community Compost Coalition

Appendix A: Glossary of Terms

BEGINNING FARMER

A beginning farmer is an individual who has not operated a farm or who has operated a farm or ranch for not more than ten consecutive years.

CO-PACKER (CONTRACT PACKER)

In the food industry, co-packing, or contract packaging, is when a company outsources the

packaging and sometimes the production of their food and beverage products to a third-party

Company. Co-packers can make it easier for small food businesses to grow, without the need for investing in their own larger scale processing infrastructure.

COUNTY HEALTH RANKINGS

Annual County Health Rankings measure vital health factors, such as high school graduation rates, obesity, smoking, unemployment, access to healthy foods, the quality of air and water, income inequality, and teen births in nearly every county in America. The annual Rankings reveal how the built environment and socioeconomic factors influence health.

C.S.A.

Community Support Agriculture. A marketing model in which consumers (often called members or shareholders) buy a subscription or share of a farm's produce in advance. This arrangement provides farmers with upfront capital for the growing season and guarantees members a regular supply of fresh, locally grown food—usually distributed weekly in the form of produce boxes.

DIRECT-TO-CONSUMER (DTC) MARKETING

Where local producers engage with consumers face-to-face at roadside stands, farmers' markets, pick-your-own farms, on-farm stores, and community-supported agricultural arrangements (CSAs).

DOUBLE UP FOOD BUCKS

A program that doubles the value of federal SNAP benefits spent at participating markets and food retail stores, helping people bring home more healthy fruits and vegetables while supporting local farmers.

GOOD AGRICULTURAL PRACTICES

Good Agricultural Practices (GAPs) are agricultural management practices that reduce the risk of contamination and microbial issues on farms and in packinghouses.

FARM TO SCHOOL

Farm to school is an initiative that aims to connect communities, through schools, with healthy, local food. Farm-to-school programs also aim to support local farmers.

FOOD AS MEDICINE

Food as medicine is a philosophy where food and nutrition aids individuals through interventions that support health and wellness. Food-as-medicine programs, including produce prescriptions and medically tailored meals, use food-based interventions to help prevent, manage, and treat diet-related diseases.

FOOD RESCUE

The practice of safely retrieving wholesome food still fit for human consumption that would otherwise be left unharvested or go to animal feed or a composting facility, anaerobic digestion facility, energy recovery facility, or other disposal site and redistributing that food through a food assistance program.

FOOD WASTE RECOVERY

The process of obtaining remaining valuable constituents from food via composting or anaerobic digestion.

FOOD HUB

A business or organization that actively manages the aggregation, distribution, and marketing of source-identified food products, primarily from local and regional producers, to strengthen their ability to satisfy wholesale, retail, and institutional demand.

FOOD SYSTEM

The path food follows as it moves from the farm to your table. It encompasses a range of activities, including growing, foraging, and ranching; processing; transporting and distributing; retailing and marketing; preparation and cooking; eating; waste management; safety; land and water stewardship; and environmental preservation. The journey our food takes through the

food system is influenced by the Rogue Valley's ecosystem, research, education, funding, policies, and our community's rich cultural traditions.

FOODWAYS

The cultural, social, and economic practices related to the production, distribution, and consumption of food. Foodways are often a reflection of a group or culture's history, traditions, and beliefs.

H2A WORKERS

H2A workers are temporary foreign agricultural workers who are admitted to the United States to perform seasonal or temporary agricultural work. The H-2A visa program allows U.S. employers to bring foreign nationals to fill agricultural jobs when there are not enough domestic workers available. H-2B visas are for temporary non-agricultural workers.

MIGRANT FARMWORKER

A migrant farmworker is anyone employed in agriculture on a temporary basis that is required by their work to be absent overnight from their permanent place of residence.

REGENERATIVE AGRICULTURE

Regenerative agriculture is a system of farming principles and practices that seeks to rehabilitate and enhance the entire ecosystem. This includes farming techniques that enhance the land, including regenerating topsoil and increasing biodiversity; that are resilient to climate change; and that provide a livelihood for the farm families and the local community.

SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP)

The largest federal nutrition assistance program, SNAP provides benefits to eligible low-income individuals and families via an electronic benefits transfer (EBT) card. This card is used like a debit card to purchase eligible food in authorized retail food stores.

SUSTAINABILITY

Sustainability is often defined as "meeting the needs of the present without compromising the ability of future generations to meet their own needs." It includes environmental, social, and economic sustainability.

VALUE-CHAIN COORDINATOR

Food value chains differ from typical food supply chains in that they are intentionally structured to produce both business success and social benefit. Value-chain coordinators may play multiple roles in the development of food value chains, including market match making, convener/relationship builder, resource prospector, policy thought leader, technical assistance provider, and catalyst/innovator.

VALUE ADDED PROCESSING

Value-added processing is a means to utilize produce not used for fresh market sales and the surplus of product during the growing season. Adding value can be something as simple as sorting fruits and vegetables by size and selling through unique packaging to the complexity of processing salsa, jams, jellies, chutney, and meat animals.

WIC

WIC is a public health nutrition program serving women, infants and children through healthy foods, nutrition education, breastfeeding support and community referrals.

Appendix B: Food System Stakeholders

Organizations are local to Jackson and Josephine Counties unless otherwise noted. Organizations marked "Regional" work in bordering counties as well.

Agricultural Production

1000 Friends of Oregon (State-wide)

American Farmland trust (State-wide)

Bee Regenerative (State-wide)

Cultivate Oregon

Evers Ridge Farm

Faerie Road Farm

Feral Farm Seeds

Food Innovation Center (State-wide)

Freedom Farm

Fry Family Farm

Hardy Seeds

Harry and David

Heritage Grains Project

Holly Street Community Garden

Jackson Soil and Water Conservation District

Josephine County Farm Collective (Regional)

Josephine County Food Bank and Raptor Creek Farm

Klamath Grown (Regional)

Latigo Farm

Montgomery Meats

Natural Resources Conservation Service

Oregon Agricultural Trust (State-wide)

Oregon Department of Agriculture (State-wide)

Oregon Food Hub Network (State-wide)

Oregon Pasture Network (State-wide)

Oregon Tilth (State-wide)

Oshala Farms

OSU Small Farms Program (State-wide)

Rogue Farm Corps (State-wide)

Rogue Valley Farm to School

Rusted Gate Farm

Siskiyou Seeds

SOU Institute for Applied Sustainability

Southern Oregon Farmers Network

Southern Oregon Seed Growers Association

The Farm at SOU

Uproot Meats

Verdant Phoenix Farm

White Oak Farms

Willow-Witt

Community Development

A Greater Applegate

Applegate Valley Food and Farm Network

Ashland Chamber

Department of Human Services (State-wide)

Four Way Community Foundation

Gordon Elwood Foundation (Regional)

Illinois Valley Community Development Organization

Illinois Valley Family Coalition

Indigenous Gardens Network (State-wide)

Oregon Community Food System Network (State-wide)

Oregon Community Foundation (State-wide)

Rogue Community College

Rogue River Community Center

Southern Oregon Regional Economic Development Initiative

Sunstone Housing Collaborative

Teresa McCormick Center (Regional)

Travel Southern Oregon

United Way Jackson County

Consumption and Community Awareness

Applegate Evening Market

Ashland Community Food Bank

Ashland Food Co-op

Ashland's Own Shop'n Kart

Boys and Girls Club of the Rogue Valley

Carson's Bistro

Cartwright's Market

Cave Junction Farmers Market

Family Nurturing Center

Food and Friends

Food Angels

Fry Family Farm

Grants Pass Growers Market

Harry and David

Holly Street Community Garden

Jefferson Farm Kitchen

Maslow Project

Master Gardeners

Medford Food Co-op

Medford Food Project

Oregon Cheese Cave

Oregon Coast Visitor Association (Regional)

Oregon Farmers Markets Association (State-wide)

Oregon Farm to Institution Collaborative (State-wide)

Oregon Farm to School Network (State-wide)

Oregon Food Hub Network (State-wide)

Pickled Planet (Regional)

Rogue Creamery

Rogue Natural Foods (Regional)

Rogue Produce (Regional)

Rogue Valley Growers and Crafters Market

Sherm's Food 4 Less

Taylor's Sausage

Whistling Duck Farm

Williams Farmers Market

Environment and Natural Resources

American Farmland trust (State-wide)

Bee Regenerative (State-wide)

Certified Naturally Grown (State-wide)

Cultivate Oregon

Department of Environmental Quality (State-wide)

Dry Farming Institute (National)

Friends of Family Farmers (State-wide)

Friends of Shasta River

Hardy Seeds

Heritage Grains Project

Indigenous Gardens Network (State-wide)

Jackson Soil and Water Conservation District

K.S. Wild

Klamath Water Protectors (Regional)

Lomakatsi Restoration Project

Medford Irrigation District

National Organics Program (National)

Natural Resources Conservation Service

Oregon Agricultural Trust (State-wide)

Oregon Climate and Ag Network (State-wide)

Oregon Coast Visitor Association (Regional)

Oregon Department of Fish and Wildlife (State-wide)

Oregon Pasture Network (State-wide)

Oregon Tilth (State-wide)

OSU Extension Service (State-wide)

Pollinator Project

Rogue Basin Partnership

Rogue Native Plant Partnership

Rogue Riverkeeper

Southern Oregon Land Conservancy

Talent Irrigation District

The Farm at SOU

USDA National Resource Conservation District (National)

Vesper Meadows

Water Climate Trust

Water League (Regional)

Willow-Witt Ranch

Food Waste Management

Ashland Community Composting

Community Compost Coalition

Department of Environmental Quality (State-wide)

Evers Ridge Farm

Recology Ashland

Rogue Disposal

Rogue Produce Community Compost

Southern Oregon Bokashi

Southern Oregon Food Solutions

The Gleaners Network

Infrastructure

Ag West Supply (Regional)

Applegate Valley Food Hub at Blue Fox Farm

Farmers Market Fund (State-wide)

Grange Co-op (State-wide)

Grants Pass Growers Market

Jacksonville Farmers Market

Jefferson Farm Kitchen

Josephine County Farm Collective

Klamath Grown (Regional)

Medford Food Co-op

Montgomery Meats

Oregon Farmers Markets Association (State-wide)

Oregon Farm to Institution Collaborative (State-wide)

Oregon Health Authority (State-wide)

OSU Extension Service (State-wide)

OtterBee's Market (Regional)

Rogue Community College

Rogue Community Health

Rogue Food Unites (State-wide)

Rogue Natural Foods (Regional)

Rogue Produce (Regional)

Rogue Retreat

Rogue Valley Growers and Crafters Market

Rogue Valley Transportation Dept

Rusted Gate Farm

Small Business Development Center at SOU

Southern Oregon Food Alliance (Regional)

Space LLC

Labor and Employment

NW Seasonal Workers

Rogue Farm Corps (State-wide)

UNETE

Work Source

Nutrition & Health, Food Security, Emergency Resilience

AllCare Health (Regional)

Ashland Community Food Bank

Ashland Food Co-op

Ashland Food Project

Boys and Girls Club of the Rogue Valley

Cave Junction Farmers Market

Department of Human Services (State-wide)

Family Nurturing Center

Farmers Market Fund (State-wide)

Food and Friends

Food Angels

Fresh Alliance (Oregon Food Bank) (State-wide)

God's Food Pantry

Head Start (State-wide)

Jackson Care Connect (Regional)

Jackson County Master Gardener Association

Jackson County Public Health Department

Jefferson Regional Health Alliance

Josephine County Farm Collective (Regional)

Josephine County Food Bank and Raptor Creek Farm

Josephine County Public Health Department

La Clinica (Regional)

Main Ingredient Community Restaurant

Maslow Project

Master Gardeners

Medford Food Project

Medford Gospel Mission

Odd Fellows Lodge (Gold HIll)

Oregon Farm to School Network (State-wide)

Oregon Food Bank (State-wide)

Oregon Health Authority (State-wide)

OSU Food Hero Nutrition Education

OSU Master Gardeners

OSU Small Farms Program (State-wide)

Rogue Community Health

Rogue Food Unites (State-wide)

Rogue Retreat

Rogue Valley Farm to School

Rogue Valley Transportation District

Siskiyou Community Health Center - Outreach Dept.

SO Health-E

SOU Institute for Applied Sustainability

St. Mark's Episcopal Church

St. Vincent De Paul

Talent Food Project

Uncle Food's Diner (Ashland Peace House)

West Medford Food Pantry

Policy and Advocacy

Friends of Family Farmers (State-wide)

Oregon Climate and Ag Network (State-wide)

Oregon Community Food System Network (State-wide)

Oregon Food Bank (State-wide)

Our Family Farms

Rogue Riverkeeper

SOLVE Oregon

Southern Oregon Land Conservancy

UNETE

Appendix C: Online Resources

Farm and Food Resources:

Friends of Family Farmers Resource Directory
resources.friendsoffamilyfarmers.org/
Oregon Farm Link
oregonfarmlink.org/
ODA Food Safety map
tinyurl.com/ODAfoodsafety
Food Hub Network from Oregon Community Food System Network
ocfsn.org/food-hub
Beginning Farmer & Rancher Oregon Service Providers from Oregon Community Food System Network
www.arcgis.com/apps/Shortlist/index.html?appid=e2f5bbf828b14c02bd652f3a83050851

Food Insecurity:

Grocery Gap Atlas Josephine County
grocerygapatlas.rafiusa.org/county/41033
Grocery Gap Atlas Jackson County
grocerygapatlas.rafiusa.org/county/41029
Small Farms Food System Indicators
smallfarms.oregonstate.edu/smallfarms/introduction-community-food-system-indicators

Find Local Food:

Find Local Food Directory from Rogue Valley Food System Network
rvfoodsystem.org/findlocal
Good Meat Finder
goodmeatproject.org/good-meat-finder
Find Local Food Directory from Friends of Family Farmers
friendsoffamilyfarmers.org/find-local-food/
Rogue Flavor Guide from Rogue Valley Food System Network
rvfoodsystem.org/rogueflavor

Food Waste:

Oregon Wasted Food Study: Institutional and Commercial Sector Case Studies
www.oregon.gov/deq/mm/Documents/ORWastedFoodStudyCommIntro-Concl.pdf
Evaluation of Climate, Energy, and Soils Impacts of Selected Food Discards Management Systems
www.oregon.gov/deq/FilterDocs/FoodWasteStudyReport.pdf

Rogue Valley Food System NETWORK

growing our local food system

Learn more online at:

rvfoodsystem.org

rvfoodsystem