

SMALL SCALE FARMING

IN THE

SOUTH COWICHAN VALLEY
(2000)



**Ministry of Agriculture,
Food and Fisheries**

Acknowledgements

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The project would not have been possible without the dedication of Samir Siksik, who's co-op work term revolved around this project.

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Executive Summary

When you look at a small scale farm¹, what do you see? When you drive by the street front shops in Chemainus or go to your local Wal Mart – what do you see? This report tries to paint a picture of small scale agriculture as a home based business that provides a second family income and supports the rural community – not unlike the small urban based shops in Chemainus.

Large scale farming provides the bulk of our food needs at low prices and must compete in global markets – similar to Wal Mart. Small scale farms provide specialized, differentiated products to meet local demand – similar to the small shops in Chemainus.

The South Cowichan Valley was studied to help paint a better picture of small scale farming in the community. The major findings of the study include:

1. Farming is a Growing Business

- There is a steady stream of new entrants to farming (3% / year) and they tend to stay in the industry for a long time.
- Farms (large and small) tend to increase their output over time.
- Twice as many existing farms are expanding in size than are reducing in size.
- Small farms are best considered as small to medium sized home based businesses – no different in purpose than any other form of small business.

2. Markets for Farm Products are Diverse

- Only one in five farms sell to formal marketing agencies and these sales represent only 70% of farm production.
- Four out of every five farms (including many large scale farms) sell some product at the farm gate. **40% of farms rely totally on farm gate sales.**
- Two out of every three farms are mixed farm operations.
- For every \$1 of sales at farmers markets there is \$3 more in other farm direct market sales.

3. While large farms are intensive in capital equipment, small farms are intensive in human capital

- Small farms are 3 times more labour intensive per \$ of sales than large farms. The addition of \$100 in sales supports 1 person day of work on small farms while \$325 in sales is required to support 1 person day of work on a large farm.
- Close to half (44%) of the total farm work reported in the community is on small farms.
- The value of work² on farms exceeds cash wages by 50%.
- The value of work on farms selling \$10,000 - \$50,000 annually averages \$16,000/year – an attractive second family income.

¹ The Ministry of Agriculture, Food and Fisheries' work has defined small scale as annual sales <\$50,000 and small lot as lots < 10 acres

² Explained in more detail on page 14

4. On-Farm Value Added

- Only 1 in 4 farmers selling in the direct market consider that they add value to their primary product and the most common commodities for value-added are beef and poultry. More value added products may be a potential growth opportunity in the Cowichan Valley.

5. Limitations on Further Growth

- Excessive government regulations, lack of auction and processing facilities for small scale livestock production and lack of personal time are viewed as the key limits on future growth.
- Lot size (or land capability) was not considered a significant constraint.

6. Opportunities for Growth

- Fewer respondents than expected (on the horticulture side) reported adding value to their products – there is an opportunity for growth in value added sales.
- Small farms are an attractive second family income when sales per year are in the \$10,000 to \$50,000 range. Compared to the province as a whole, the Cowichan Valley is under represented in this size farm and is over represented in farms selling under \$5,000 – an opportunity exists to expand output of farms selling under \$5,000.



I. Introduction

The primary purpose of the survey in the South Cowichan Valley was to obtain information on farm labour and marketing methods on small scale direct market farms – information not previously available. A secondary purpose was to gain a better insight into the role of smaller scale³ agriculture in the rural community and identify opportunities for further growth in the sector.

From the 1940's to the 1980's agriculture in BC was predominantly commodity based and marketed through formal marketing agencies or auctions. During the last 2 decades there has been strong growth, some would say an explosion, in small scale mixed farm operations that sell directly to both consumers and retailers. The product sales, farm work and contribution to the community of these operations are difficult to measure so their value is often discounted. At two recent workshops on small lot/ scale agriculture producers expressed a strong interest in having better information on the role of small scale direct marketed production in their community.

To respond to this need the Small Farm Project of the Ministry of Agriculture, Food and Fisheries worked with the Cowichan Valley Smallholders Society, Cowichan Agriculture Society and the Island Farmers Alliance as well as the Community Futures Corporation to design and conduct a study to begin to better understand the value of farming – predominantly small scale direct market farming - to the community.

The key contributions of the report are a better understanding of:

1. the relationship between the volume of product marketed through formal marketing agencies compared to the volume marketed direct to consumers,
2. the nature of farm labour on small scale operations, and
3. the challenges and opportunities in small scale agriculture production



³ The Ministry of Agriculture, Food and Fisheries' work has defined small scale as annual sales <\$50,000 and small lot as lots < 10 acres

The South Cowichan Valley Project analyzed the subdivision C census area of the Cowichan Valley. The basis of the study was a survey of all the lots in areas zoned primarily for agriculture and selective lots in residential areas that permit agriculture in the South Cowichan census area. In total 717 lots were sent survey forms.

South Cowichan was chosen because it had a profile of large and small farms similar to the provincial average, an urban center close by, somewhat well defined boundaries and a manageable size for a survey of this nature.

The completed survey forms were sent directly to the Island Farmers Alliance to remove any tracking information before being forwarded to the Ministry Agriculture, Food and Fisheries for analysis. The methodology used in the survey is discussed in more detail in the appendix.

For further information on the survey and the report contact

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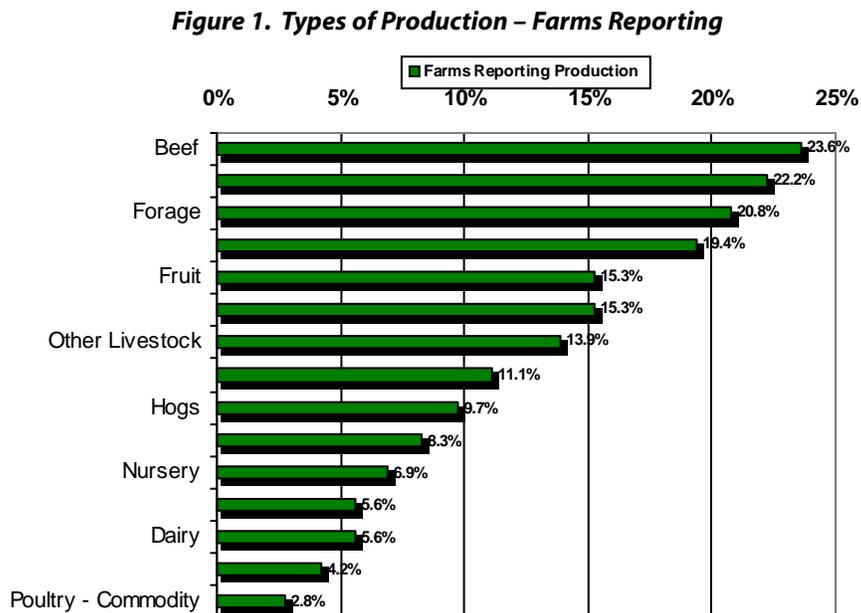
IV. Detailed Survey Results

Responses were received from 72 producing farms. The 1996 census identified 211 farms in the survey area. If the same growth in farm numbers from '91 to '96 continued through to 2000⁴ the 72 responses would represent approximately 30% of the operating farms in the survey area. From a farm size perspective the profile of responses fits the census of agriculture profile indicating the responses are a good representation of the farms in the survey area⁵.

The results are discussed in 4 areas, the farming community, sales and marketing, work on the farm and value added; with a fifth section for other comments. The approach to discussing work on the farm is different than previous methods, however, it provides some interesting insights into small scale farming operations.

1) The Farming Community

Figure 1 shows the types of production reported by the respondents. Almost 2/3rds of the respondents produced products from 2 categories and 1/3rd produced products from 3 categories.



Seven of the top nine commodities mentioned are livestock based indicating a strong interest in small scale livestock production. Non-quota poultry and egg production, sold direct market, were separated from production sold through the regulated marketing channel.⁶

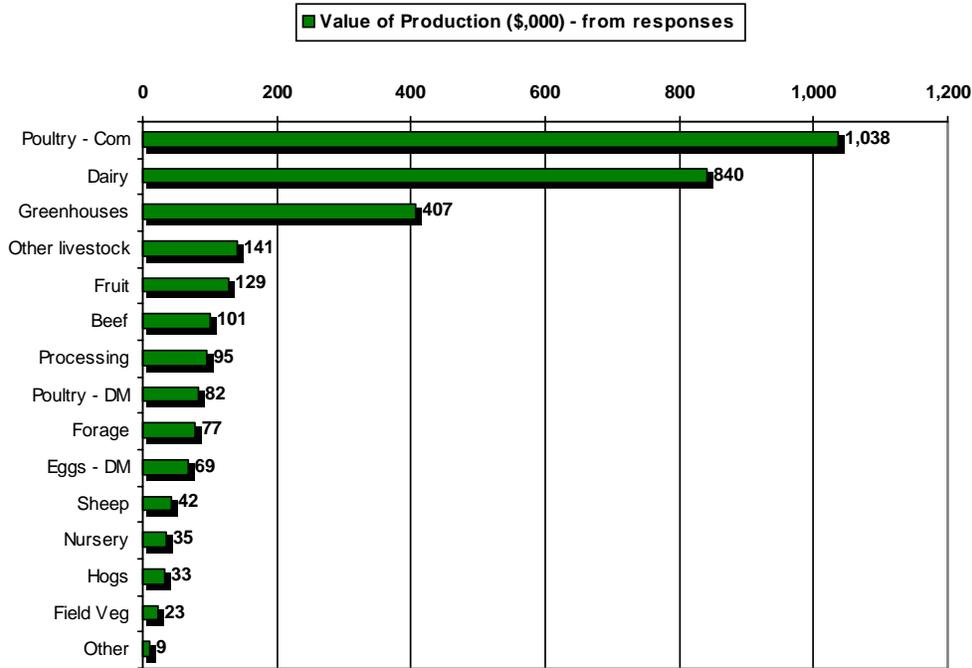
⁴ See the methodology section in the appendix for more detail . Page 22

⁵ This point is discussed further in the methodology section. Page 22

⁷ Farms were separated according to the response to the marketing question on the survey.

Figure 2 shows the estimated value of production. While small scale livestock dominates by number of farms, large scale chicken, dairy and greenhouse production dominates by quantity of output.

Figure 2. Value of Production From Farms Responding (approximately 30% of the industry)



Given that the sample is only 30% of the total industry a very rough estimate of the annual sales of non-quota production of eggs and meat birds in the survey area is \$225,000 and \$275,000 respectively. The sales volume of farms responding was \$3.1 million indicating the total agriculture production for the survey area is approximately \$10 million annually⁷.

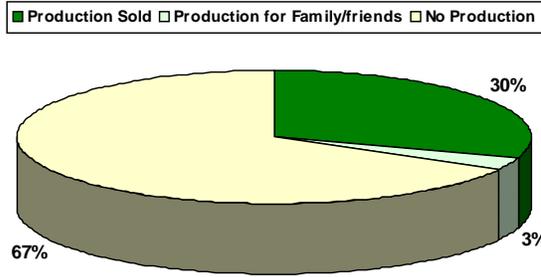
Figure 3 and 4 together demonstrate two different perspectives with which people view farming. When farming is viewed strictly from a sales volume perspective, policy is focused on a small number of high output farms and tends to focus on global markets. When farming is viewed from a number of farms or land base perspective policy becomes more focused on the large number of lower output farms and tends to focus more on community needs.

In farming areas land can be used for residential or other non-farming activities. Figure 3 is a rough estimate of the ratio of land use in the survey area⁸.

⁷ Similar treatment with the Census of Agriculture numbers estimates total sales at \$11 - \$12 million

⁸ Based on responses to the survey and BCAA information on the number of lots with farmland classification.

Figure 3. Rural Land use in South Cowichan



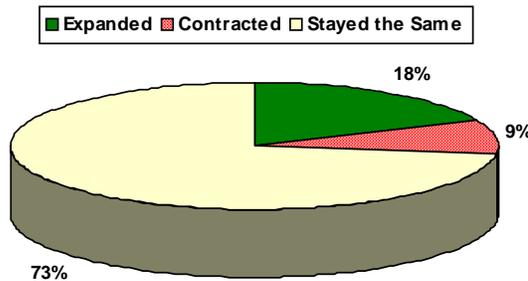
The number of responses from farms producing agriculture products strictly for family and friends was too high to ignore. This segment of the farming community has not been well recognized in the past. Farm income is not recorded and farmland classification is not requested yet active farming is taking place on what could best be described as a micro-cooperative basis.

With only 1/3rd of the lots actually in production, future growth is not constrained by a lack of land. While 2/3rd of the lots are not farmed – it is not clear what portion is actually available for potential farmers or existing farmers wishing to expand. This question was outside the scope of the survey but should be considered in any future work.

Is the industry growing? Responses indicated that more existing farms were expanding than reducing output and that there was a steady stream of new entrants.

Figure 4 indicates the response to the question *has your farm operation expanded, contracted or stayed the same over the last 5 years?*

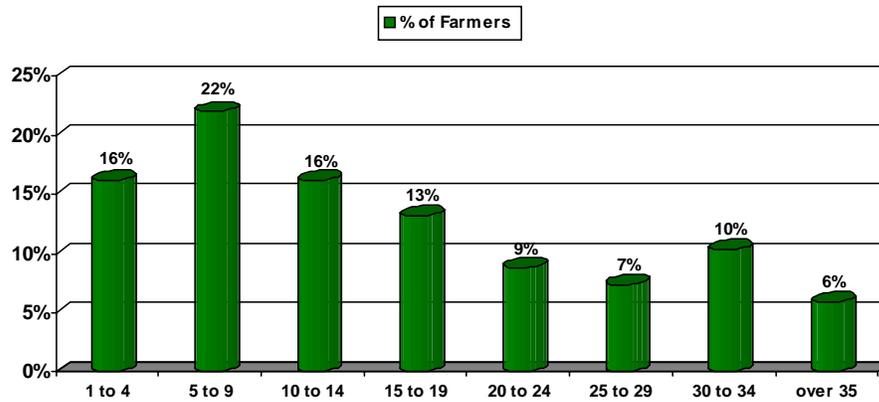
Figure 4. Recent Output Trends in Farming – South Cowichan



The number of respondents that had expanded their farms was over double those that had contracted their farms and the increase or new sales was also double the loss in sales.

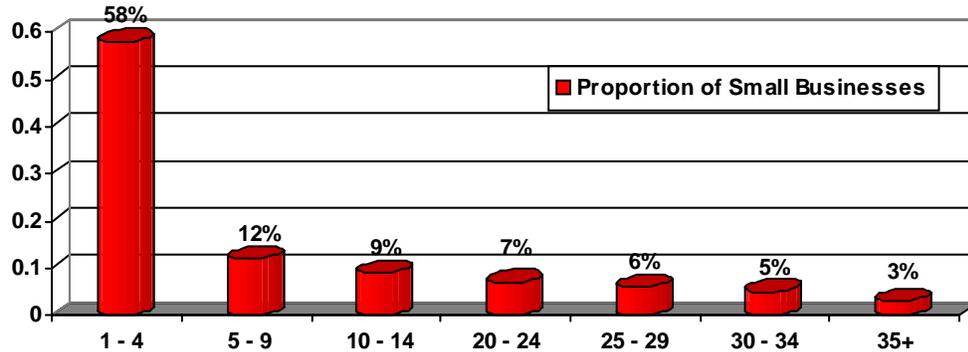
There are perceptions that the long term future of farming is bleak because farmers in general are older and will retire in the short term, leaving nobody to replace them. The survey responses indicated that this is not the case in the Cowichan Valley where there has been a steady stream of new farmers over the last 15 years.

Figure 5. Length of Time Farming



In other small businesses it is generally considered that 80% of all new businesses fail or dramatically change their operation within the first 5 years. If the attrition rate is 20% in each 5 year increment after that a similar profile of length of time in business for other small businesses would look similar to Figure 6.

Figure 6. Length of Time in Business - Other Small Businesses

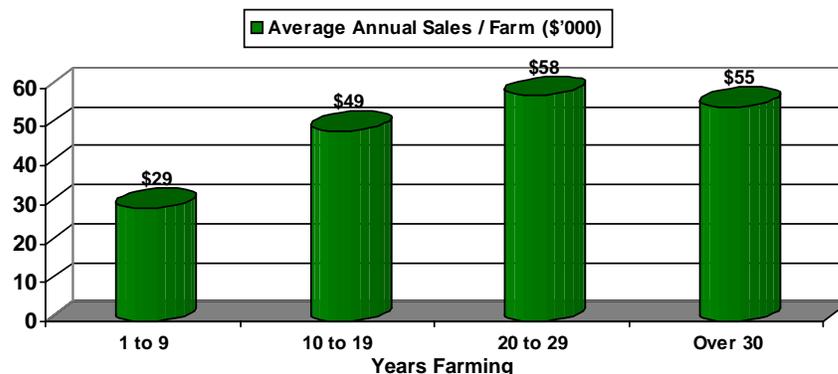


These two charts indicate that farming tends to be a more stable business than other small businesses and there is a steady stream of new entrants.

The survey did not ask the age of the respondents. In future work it would be interesting to know the age of entry into farming. Anecdotal evidence suggests it is higher than for other small businesses.

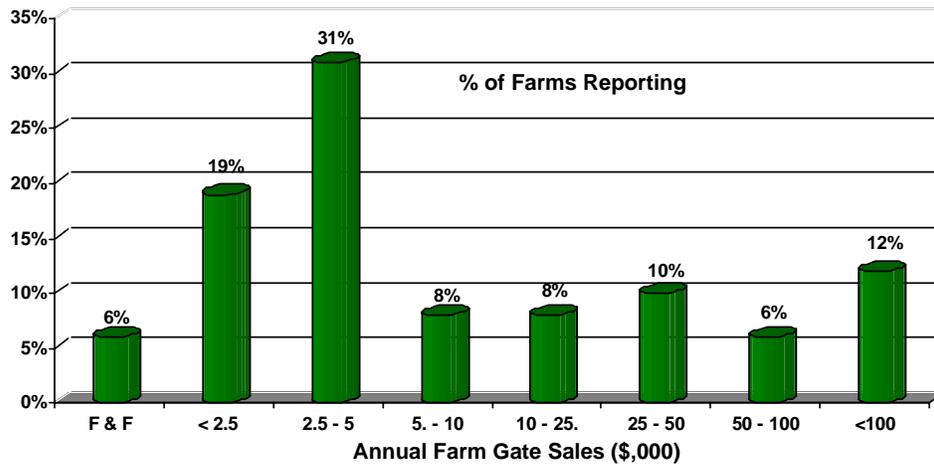
Over the first 30 years of farming, farmers tend to increase their (inflation adjusted) annual sales per year. Figure 7 shows the average annual sales based on years farming. This includes large and small farms.

Figure 7. Average Annual Sales by Years Farming



The distribution of farms responding by annual sales is shown in Figure 8.

Figure 8. Distribution of Farms by Annual Sales



While the distribution of farms by annual sales is not substantially different than the census of agriculture for the survey area it does differ from the provincial average in that it has fewer farms selling \$5,000 - \$25,000 per year.

These farms typically have started small with a differentiated product and expanded their operations. On Vancouver Island, where differentiated products are key to success in many areas of agriculture it is surprising that more small farms haven't expanded to sales over \$5,000 annually.

This may be a potential area of growth for those farmers without personal time constraints.

2) Farm Sales and Markets

Figure 9. Marketing Approach by Farms Responding

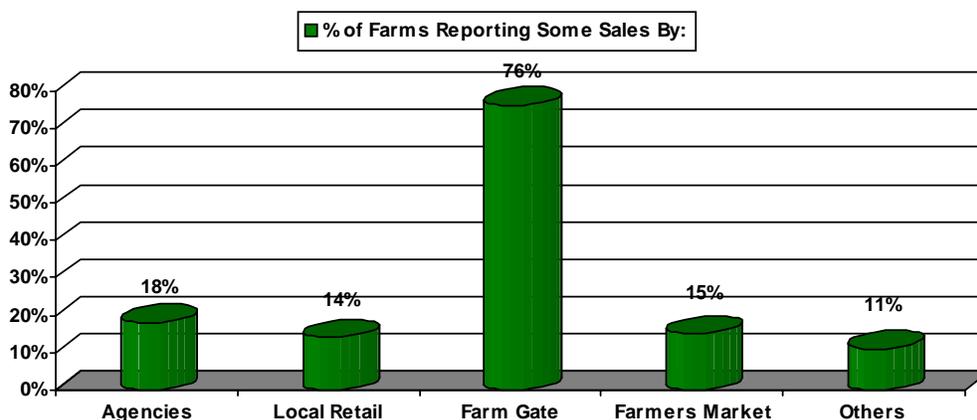
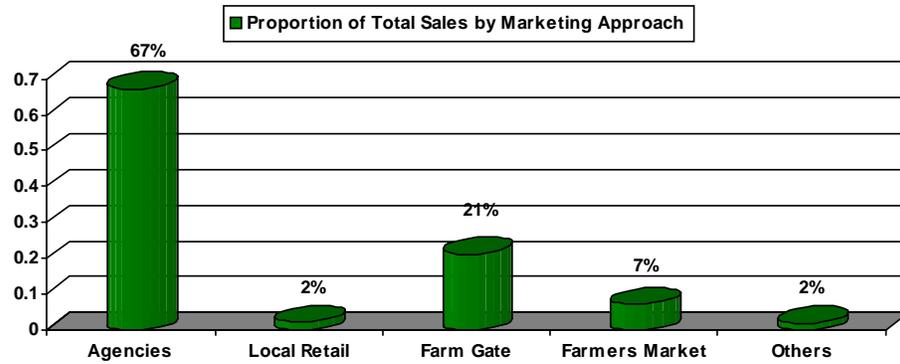


Figure 9 provides new information on methods of farm marketing. While close to 1 in 5 farms sells some or all of their product through formalized marketing agencies, 3 out of every 4 farms sells some of their production at the farm gate or directly to the consumer.

Over 40% of the farms responding relied totally on farm gate sales. Respondents indicated 15% of the farm community took advantage of farmers markets.

Figure 10. Volume of Sales by Marketing Approach



While the majority of agriculture products are produced by the large farms and marketed through formal marketing agencies, this channel only accounts for 2/3rds of the agriculture production in the community. Estimates of agriculture production have historically relied on formal marketing associations for information on farm production.

The information from this study indicates that in South Cowichan this approach would only capture 2/3rds of the production⁹.

3) Work On The Farm

The following introductory comments are provided to assist the reader in better understanding the approach taken to discuss work on the farm.

Paid wages is often used as a measure of labour activity. This is the approach used by Statistics Canada. Paid wages is easy information to collect and labour in most large organizations, and large farms, is paid in wages. In small businesses, and small farms, this approach is ineffective at capturing the value of work done.

A more general approach would be to suggest that people work to receive some benefit. When they choose to use their time to work at a specific job, they are selecting the activity that provides the highest value or benefit compared to the other options available to them.

The concept of value or benefit, as compared to cash, is most important in understanding why people establish most small businesses. Small business owners rarely measure the value of their business purely in accounting terms, especially not in the earnings they report on their income tax statements. They more often use a 'net benefit' approach to evaluating their business where the benefits can come from expenses saved as well as cash income. Hours worked is a measure of a person's net benefit from the business.¹⁰

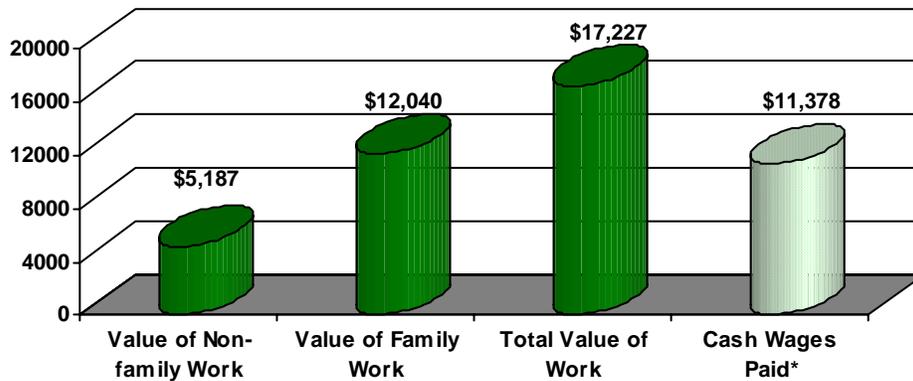
⁹ Means for every \$100,000 of farm gate sales through formal marketing agencies there is an additional \$50,000 in direct market sales

¹⁰ Non-cash benefits are sometimes dismissed as having no value. This is not the case. Non-cash benefits are those that the individual would have to purchase elsewhere if s/he did not receive them from the small business. They can be a direct off-set to real expenses like child care or transportation costs or they can be more indirect in satisfying a need that would have to be satisfied through expenditures elsewhere. Operating a small farm provides some people with value that they would have to purchase elsewhere - working with the land, a need for open space/privacy, etc.

This study uses *hours worked* as compared to *cash wages* in evaluating work on the farm. The hours worked are valued at \$9/hr to estimate a net benefit from the farm¹¹.

The 1996 census indicated 27% of farms paid cash wages to non family members and 21% of farms paid cash wages to family members. Intuitively all farms in this study reported family hours of work and 40% reported hiring off farm work. Figure 10 shows that the value of work reported in the Cowichan Study was 50% higher than the cash wages reported in the 1996 census.

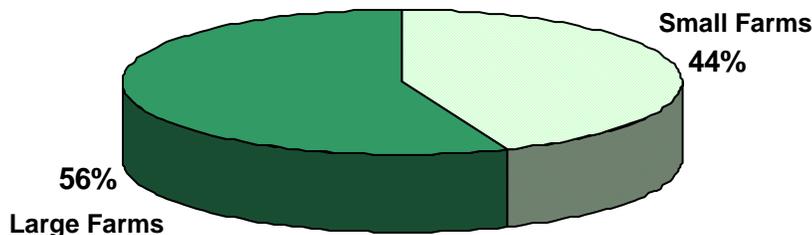
Figure 11. Average Value of Work and Cash Wages per Farm



*From the 1996 census plus 15% growth to 2000

While one might expect the larger farms to involve more work, they do not dominate the rural workforce. Small farms support close to half (44%) of the farm work.

Figure 12. Distribution of Work Between Large and Small Farms



The average value of work per farm selling under \$50,000 per year is \$12,000. A greater proportion of the work done on larger farms is done by non-family labour (50%) than the farms selling direct market (20%).

The concept of farm work can also be viewed as the value of work generated by a specific increment in sales - leading to some estimate of the jobs created for an increment in sales. Figure 13 shows the average value of work per farm at different sales levels and Figure 14 the value of sales required to support one person day of work.

¹¹ A 1997 survey of farm labour rates in BC found semi-skilled wage rates were between \$9 and \$15/ hour.

Figure 13. Average Annual Value of Work by Farm Size

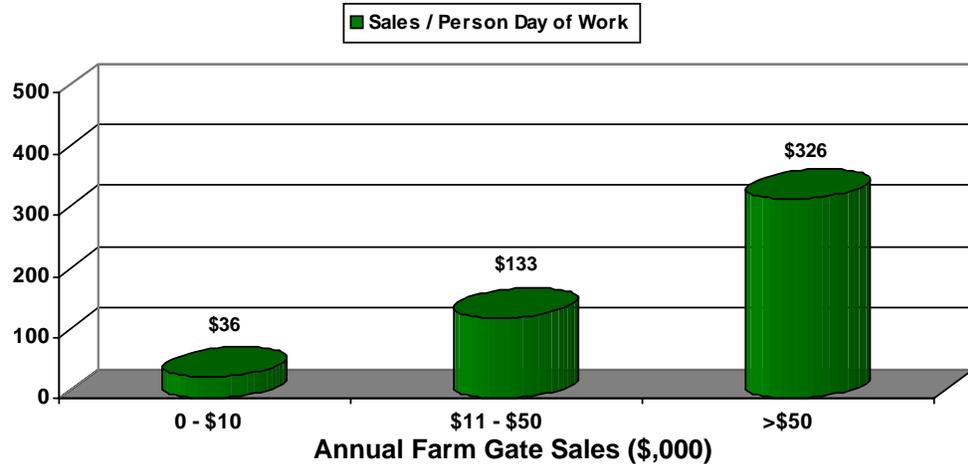


Figure 13 indicates that even the smallest farms on average require almost \$10,000 a year in work. It is interesting to note that the farms between \$11,000 and \$50,000 annual sales on average provide a benefit of over \$16,000. **At this level farming is a very attractive home based second family income.**

Figure 14. Sales per Person Day of Work at Different Scales of Operation

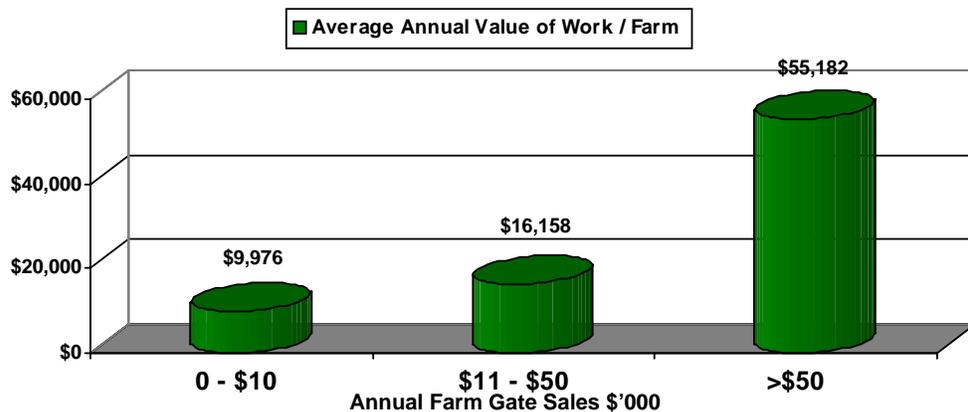


Figure 14 demonstrates three interesting points relative to farm labour. Generally:

- a) as scale of operation increases farms become less labour intensive,
- b) for farms with annual sales \$10 - \$50,000, characterized by specialized direct market farms, on average every \$130 in additional sales creates another person day of work, and
- c) on average, small farms are 3 times more labour intensive than large farms

The sales per person day of work does give some insight into, or perhaps reinforce, some of the perceptions of smaller farms. For farms selling under \$10,000 annually a larger portion of their benefit comes as non-cash benefits – expenses saved. The break point where the benefits are mostly cash varies with the type of products being produced. On average cash costs of production are usually in the 30% to 50% range for direct market operations so as sales per work/day moves above \$100 the cash benefits move closer to \$75/day of work (or \$9/hr). Small scale farm operations that can achieve the level of sales where the benefits are mostly in cash are attractive home based second incomes.

4) Value Added

The question on value added was difficult to word and probably difficult to answer for many respondents. It is hard to define where primary production ends and value added begins for many products. The results from the value added question should be taken in that light.

From the total farming picture 20% of farms report doing some value added product and the value added represented 8% of the total farm gate sales. For small scale farms, 25% of the farms (direct market) add value to their products and this represented 20% of their direct farm market sales.

Figure 15. Value Added on Small Scale Farms

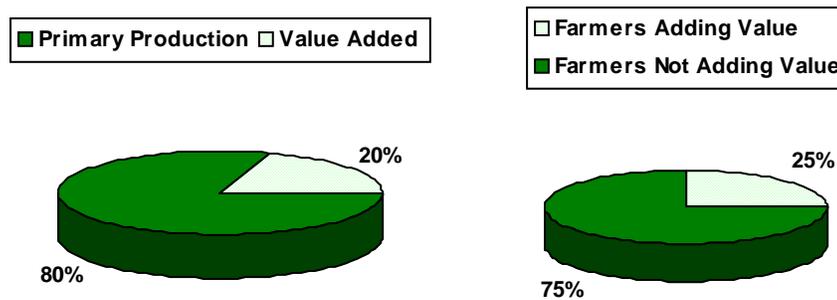
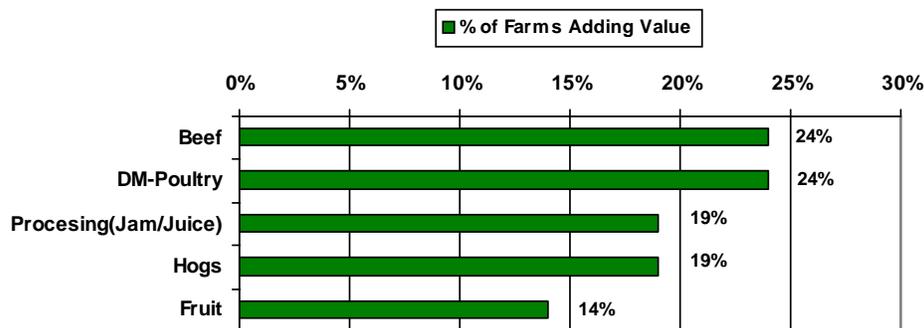


Figure 16. Commodities Produced on Farms Adding Value



Newer farmers are more likely to add value. 45% of farmers that have been farming for 10 years or less were adding value to their products while only 18% of respondents that have farmed more than 10 years were adding value to their products.

The level of value-added, or the perception of value-added was lower than expected and indicates it may be a potential area for growth – particularly on the horticulture side.

5) Other Comments

Four other points of interest deserve some further discussion.

a) Production for family and friends

The level of production for family and friends was interesting for several reasons. Firstly it indicates that farming activity in the rural areas is broader than is accounted for in our normal statistics and secondly it makes a statement as to the value of farmland classification. Some have characterized small farms as farming the tax system rather than farming the land. The fact that a significant number of people don't even bother going through the process of claiming farmland classification indicates that this is not the case. It also begs the question – how much is the net benefit of farmland classification?

The regulatory issues surrounding direct market livestock are often cited as a reason small direct market livestock producers do not wish to be identified. This would make the fact that a number of these producers chose to respond even more significant.

b) Farmers market and farm gate sales

Respondents indicated that product sold at farmers markets represented a little over 1/4 of the product sold direct from farms. This is the first quantitative estimate of the relationship between farmers markets and farm direct sales so it is not clear if this is a normal or optimal ratio.

c) Level of value added

Direct market sales usually require some level of product differentiation from the commodity or people would simply buy from the large retailers. Adding value is one method of product differentiation. The low level of on-farm value added or the poor understanding of what value added is may be a barrier to further growth of small scale farms.

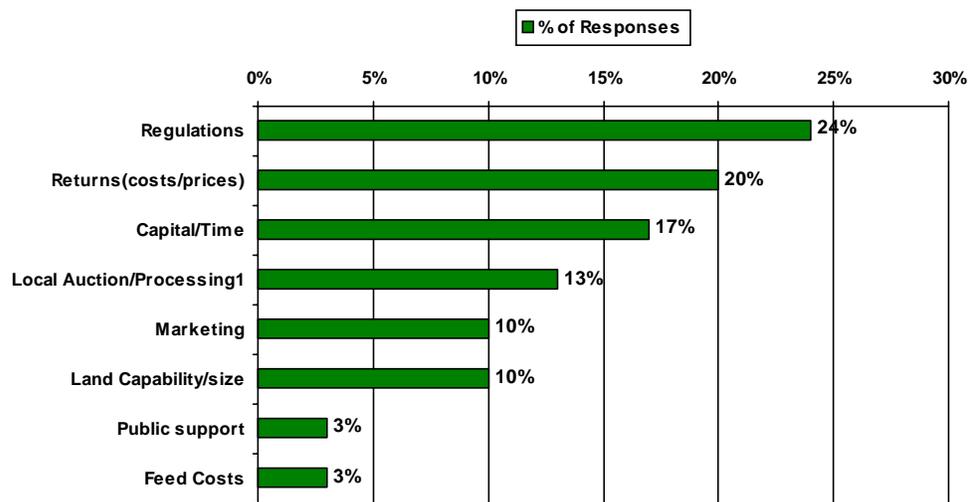
d) Beginning Farmers and Expanding Farmers

Figure 5 and 8 provide some interesting insight into some potential areas for growth. Figure 5 indicates that as many as 2 out of every 5 farmers has been farming less than 10 years and that in the Cowichan Valley small farms have not expanded into the \$10,000 to \$50,000 sales range as much as in other areas of the province. This suggests that some of the beginning farmers are not successful in taking their farms to a higher level of output and there may be some opportunity for growth in this area.

V. Challenges and Opportunities

Following the workshops on small lot/scale agriculture it is no surprise that farmers most often mentioned regulations as the greatest barrier to growth / success. Regulations include municipal, environmental and marketing regulations. The lack of a livestock auction and livestock processing was mentioned by 13% of the respondents, however, this represents 33% of the livestock farmers making it the largest constraint for them. The second constraint to growth was poor margins. While poor margins are undoubtedly a concern of most small businesses (who wouldn't want larger margins) the direct farm marketers have more control over their margins than large scale farmers.

Figure 17. Barriers to Farm Success



It is interesting to note that the lack of personal time was a significant constraint to growth. Many respondents simply did not have the available time to expand output. Another very interesting result is that land size was not considered a significant constraint to growth.

A number of opportunities flow from the identity of constraints. Some of these are:

- More consideration of small lot/scale farmers when developing regulations for:
 - environmental protection
 - direct marketing of products
 - farmland classification issues
- Work toward providing more accessible livestock auctions and processing facilities for small scale and specialty products.

Other opportunities that flow from the information gathered:

- an opportunity to help producers expand their operations – especially from annual sales of < \$ 5,000 to annual sales > \$10,000.
- an opportunity to help farmers better understand the opportunities in adding value to their products on-farm.
- an opportunity to help small scale farmers better understand how marketing and creating brand loyalty can lead to higher price (larger margins)

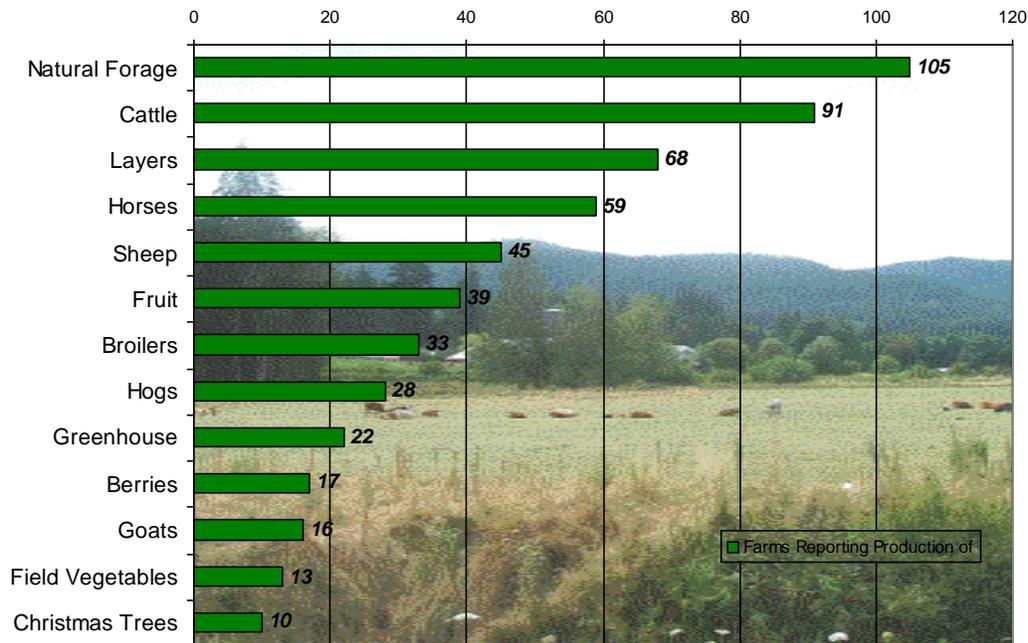
VI. Appendix

- 1) Census of Agriculture Profile of South Cowichan Valley – Area C
- 2) Methodology
- 3) Survey Form

1) Census of Agriculture Profile of South Cowichan Valley – Area C

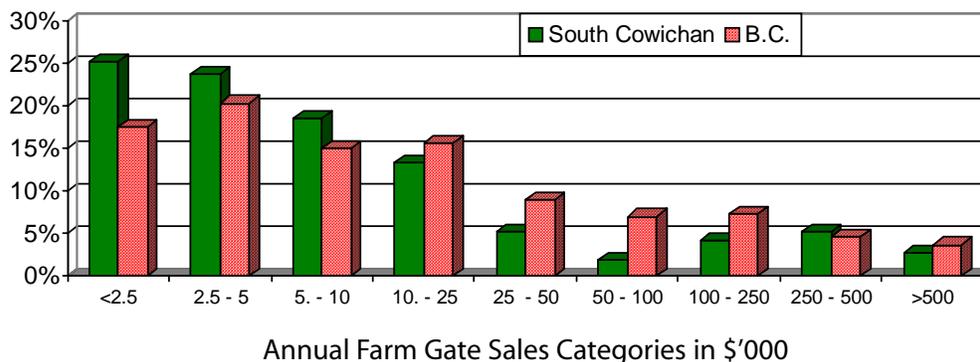
The 211 farms identified in the 1996 census of the South Cowichan census area, reported producing a wide variety of products that included almost all forms of livestock - beef, dairy, hogs, sheep, goats, chickens, turkeys and others - fruits, vegetables, forage and both field and greenhouse production of flowers and vegetables. If it is grown in BC there is a good chance it is grown in South Cowichan.

Figure 18. Types of Farm Production Reported in the 1996 Census



One could characterize agriculture in South Cowichan as being composed of a small number of large commodity focused farms dispersed among many small mixed farms. This also characterizes farming in the province as a whole as seen in Figure 19.

Figure 19. Proportion of Farms in Different Annual Sales Categories – South Cowichan Compared to BC(1996 census)



The sum of the 'farms reporting' production of specific products (the numbers in italics from figure 19) in the census totals 613 which means the 211 farms on average produce 2 to 3 different commodities.

South Cowichan has a slightly higher proportion of very small farms and a slightly lower proportion of medium sized farms but generally follows the provincial profile of farm sizes.

While the 26 farms with annual revenues over \$100,000 may derive their primary income from farming, the other 185 farms use farming as a home based second income to support their families and the rural community. In 1996 all the farms in the South Cowichan Valley collectively had \$102 m invested in farm capital, contributed \$25 m to the local/regional economy, supported over 400 full time equivalent jobs in the region.

2) Methodology

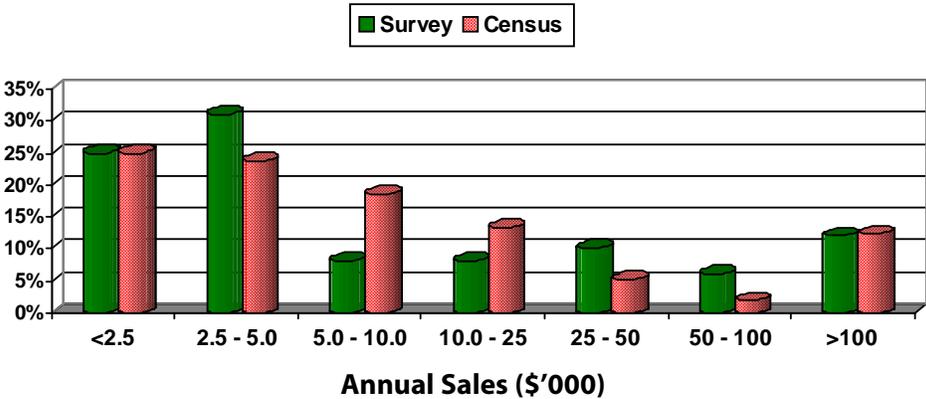
The South Cowichan Study was a survey of all the lots zoned for agriculture and all the rural residential lots where farming was permitted and were drive by observations indicated farming was taking place. Owners of multiple lots were only sent one survey form. A total of 717 surveys were sent out. 90 were returned and 72 of those were active farms.

The survey distribution was designed to cast as wide a net as possible. To estimate the responses as a proportion of total farms it is more appropriate to us the estimate of total farms by the Census of Agriculture (census). The 1996 census identified 211 farms in the South Cowichan area (C). This represented a growth rate of 18% from 1991 to 1996

(3.6%/year). If this growth rate continued to 2000 the number of farms in the survey area would have grown to 240. The 72 responses would then represent 30% of the farms in the survey area.

Figure 20 shows the proportion of different sized farms in the census and in the survey responses.

Figure 20. Comparison of Census Farms and Survey Responses by Size of Farm



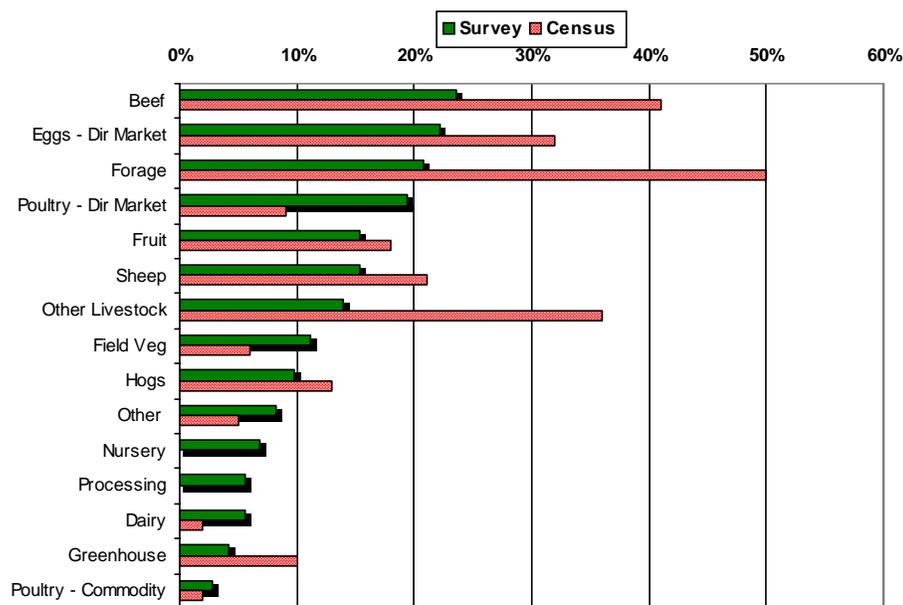
The responses had a similar proportion of very small farms (<\$5,000/yr) and a similar portion of large farms (>\$100,000)/yr. In the middle area the survey responses under represented the \$5 - \$25,000 per year farms and over represented the \$25 - \$100,000 per year farms.

In general the survey responses are a good match to the census. Under representation of the \$5,000 to \$25,000 farms may create a bias in two areas. Firstly in understating the small farm side of any comparison between large and small farms and secondly in under estimating the level of value added.

The responses reflected a broad number of commodities similar to the census profile. The large farm group was represented by dairy, poultry and greenhouses but not by hogs. Unfortunately the large hog producer in the area did not respond. This will not affect the general estimates of sales but will underestimate the volume of hog production in the area (figure 2).

Figure 21 compares the distribution of farms by commodities in the responses and the census.

Figure 21. Farms Reporting Production – Census Farms and Survey Responses



The difference in approach between the census and the survey results in a number of the observed differences. The survey asked for the top 3 commodities sold while the census asked for the existence of a farm animal, building or activity. Consequently horses, forage and some beef, sheep and layers would not show up as frequently in the survey as in the census. It is likely many of the nursery responses in the survey were noted as greenhouses in the census. The census was conducted 4 years before the survey which may explain the difference in the high growth areas of direct market poultry and field vegetables. With the differences in time and the method of asking the question taken into consideration the profiles are fairly similar.

Survey responses were sent to the Island Farmers Alliance to remove any tracking information before being sent forward to the Ministry of Agriculture Food and Fisheries for analysis. This effort to ensure confidentiality of the responses may have encouraged the responses in the 'production for family and friends' category.

3) Survey Form

South Cowichan Valley Agriculture Inventory Project

How long have you operated your farm? _____ Years

In the last 5 years has your farm operation stayed the same size _____
expanded _____ contracted _____? And if so by how much _____%

Work on your Farm

a) Family work. How much time do your family members spend working on the farm?

_____ Hours/day – livestock

_____ Person days/year – crops

b) Non-family work. How many person days of non-family labour do you employ/year? _____

Marketing Your Farm Products

What portion of your products did you sell through:

Commodity Marketing Agencies/.Associations _____ %

Local Retail Food Markets/Restaurants _____ %

Farmers Markets _____ %

Road Side Stand /Farm Gate _____ %

Others (i.e.mail order) _____ %

100 %

Adding Value to Products On Your Farm (value above what the raw ingredients would sell for)

What portion of your total sales (of all products) represents value added to raw ingredients _____%

Examples: the value of converting berries into jam, the value of dried package herbs compared to fresh herbs and the value of sausage compared to the basic cuts - do not include the cost of cutting and wrapping direct market livestock.

How Big is Your Farm – by total sales

In what range were the total sales from your farm business in 1999?

<\$2,500 _____ \$10 – 24,999 _____ \$50-99,999

\$2,500 – 4,999 _____ \$25 – 49,999 _____ > \$100,000

\$5,000 – 9,999

What Products Do You Produce? To develop a profile of the products produced in your area please indicate your main farm products and the proportion of your revenues that they account for:

Product Portion of revenues

1) _____ _____ %

2) _____ _____ %

3) _____ _____ %

What is the greatest barrier to the success of your farm operation?
