

10/2/15 Mid-Valley Regional Solutions Advisory Committee

Ecotrust on Local Food Infrastructure

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VP, Food & Farms

@ecotrust @aoborne
#localfood #agofthemiddle



ECOTRUST MISSION:

Ecotrust's mission is to inspire fresh thinking that creates economic opportunity, social equity and environmental wellbeing.



Food and Farms

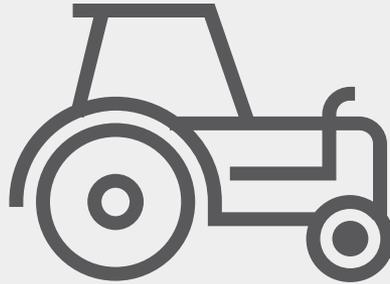


Forests



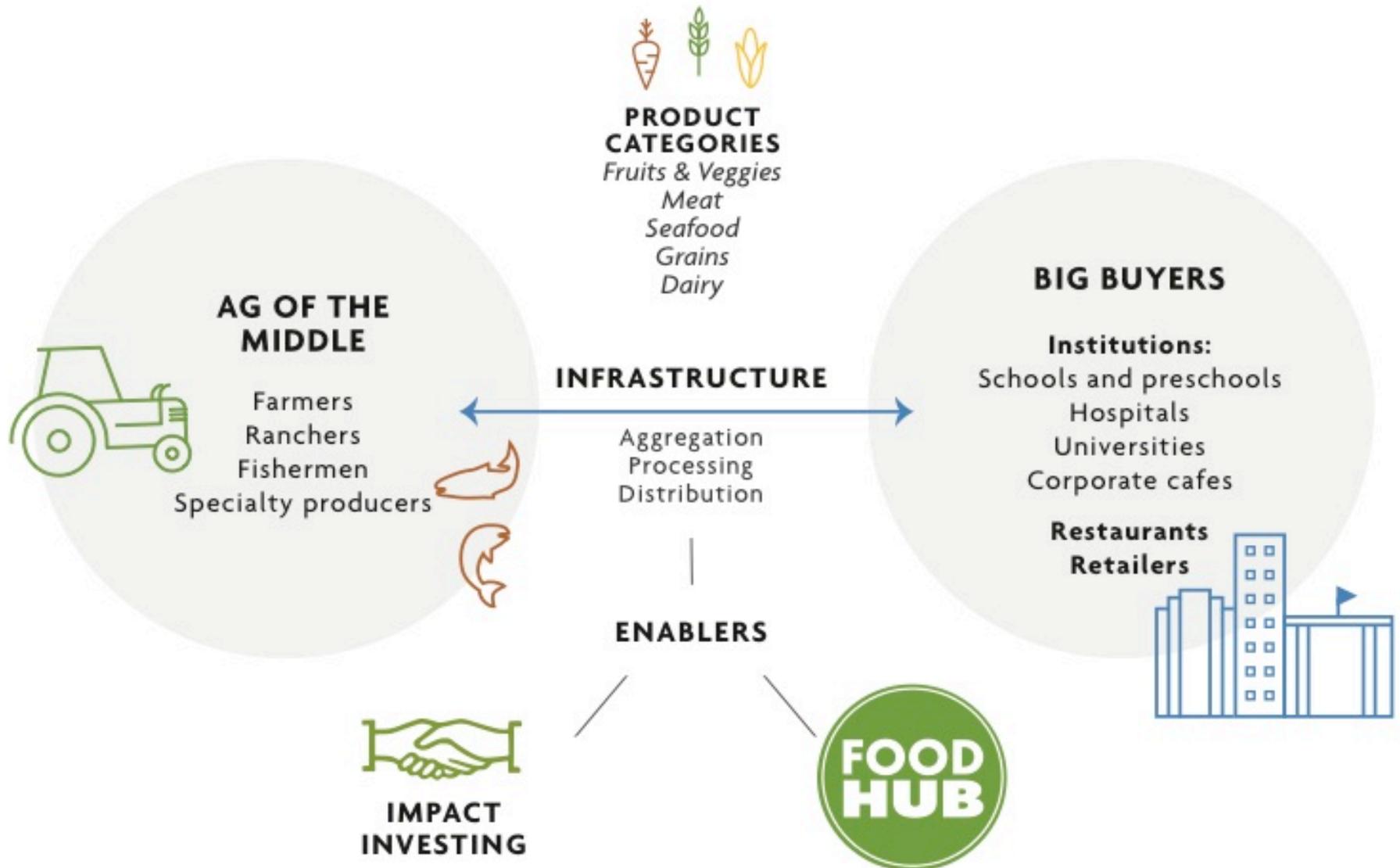
Oceans and Fisheries

FOOD & FARMS: OUR VISION



To build regional resilience by catalyzing the growth of regional food economies, as measured by the amount of food consumed within the region that was also grown and processed here.

FOOD & FARMS: BUILDING REGIONAL RESILIENCE VIA FOOD

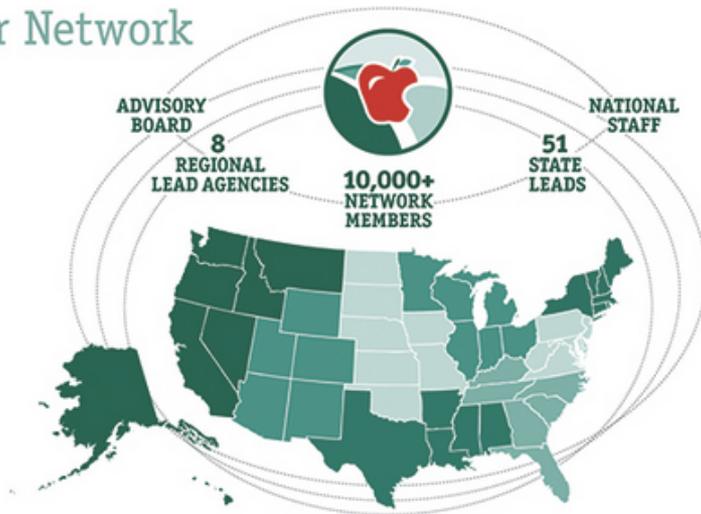


BIG BUYER DEMAND STIMULATES SYSTEM CHANGE



NATIONAL
FARM to SCHOOL
NETWORK

Our Network



NORTHWEST



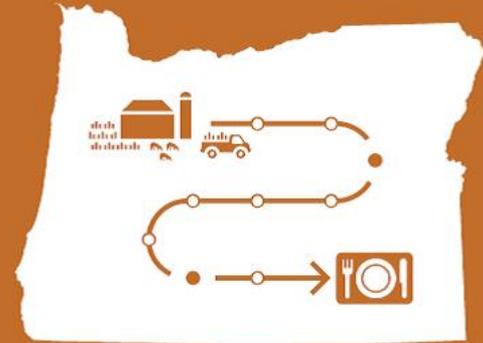
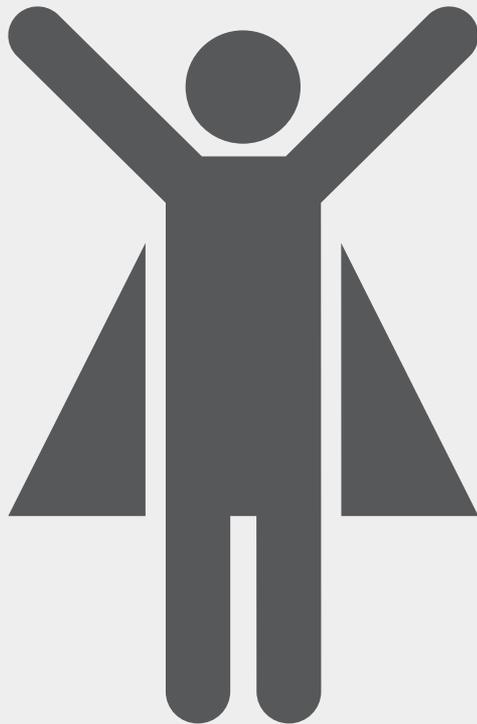
FOOD
BUYERS

ALLIANCE

INFRASTRUCTURE NEEDED FOR MARKET ACCESS

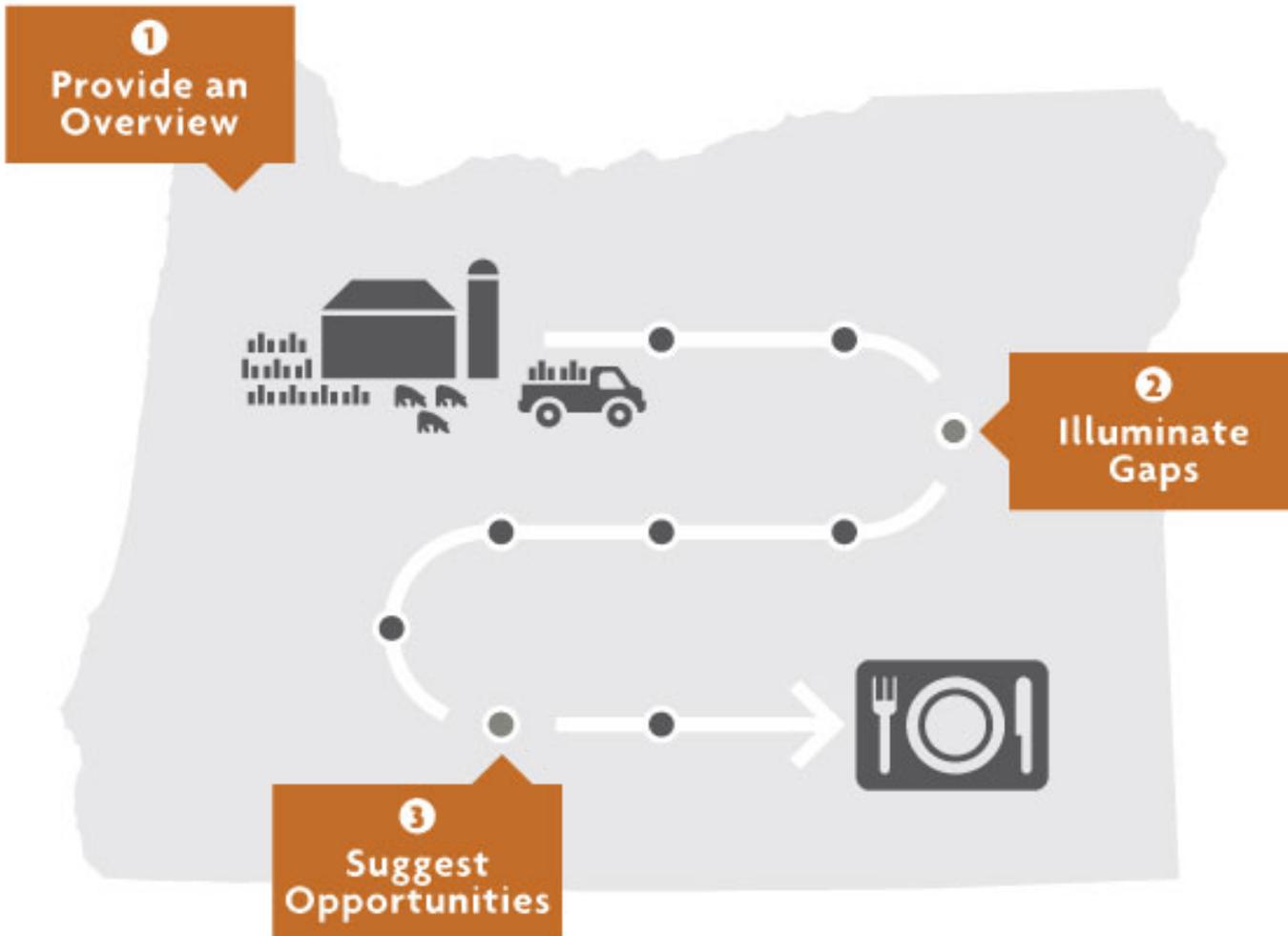
Intrepid

the Aspiring Impact Investor



Oregon Food Infrastructure Gap Analysis

Where Could Investment Catalyze Regional Food System Growth and Development?



Oregon Food Infrastructure Gap Analysis

2015



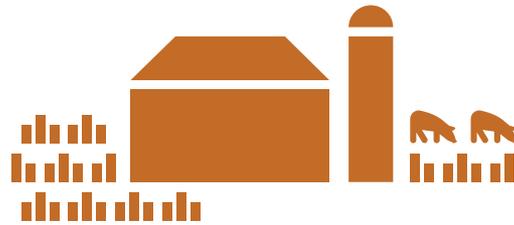
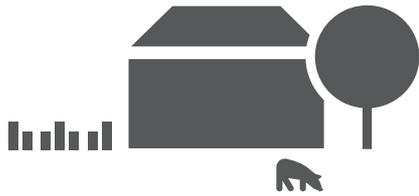
	Small	AOTM	Commodity
How big are they?	S	SS	SSSSS
Who are their customers?	Eaters	Restaurants Retailers Institutions Distributors	Processors Brokers Distributors
What's their region?	Local	Regional	Global
How diversified are they?	Very	Somewhat	Minimally
Where's the boss?	In the field	On-site	At HQ
Who owns the business?	Family	Family Co-op Partnership	Corporation
Who sets the price?	Producer	Negotiation (farmer/buyer together)	Market
Does the producer have an off-farm job?	Yes	No	No

Ag of the Middle* Framework (AOTM)

* "Ag of the Middle" is a conceptual framework, not a set of hard and fast rules. See www.agofthemiddle.org for more.

AG OF THE MIDDLE = SWEET SPOT FOR REGIONAL FOOD

AG of the MIDDLE



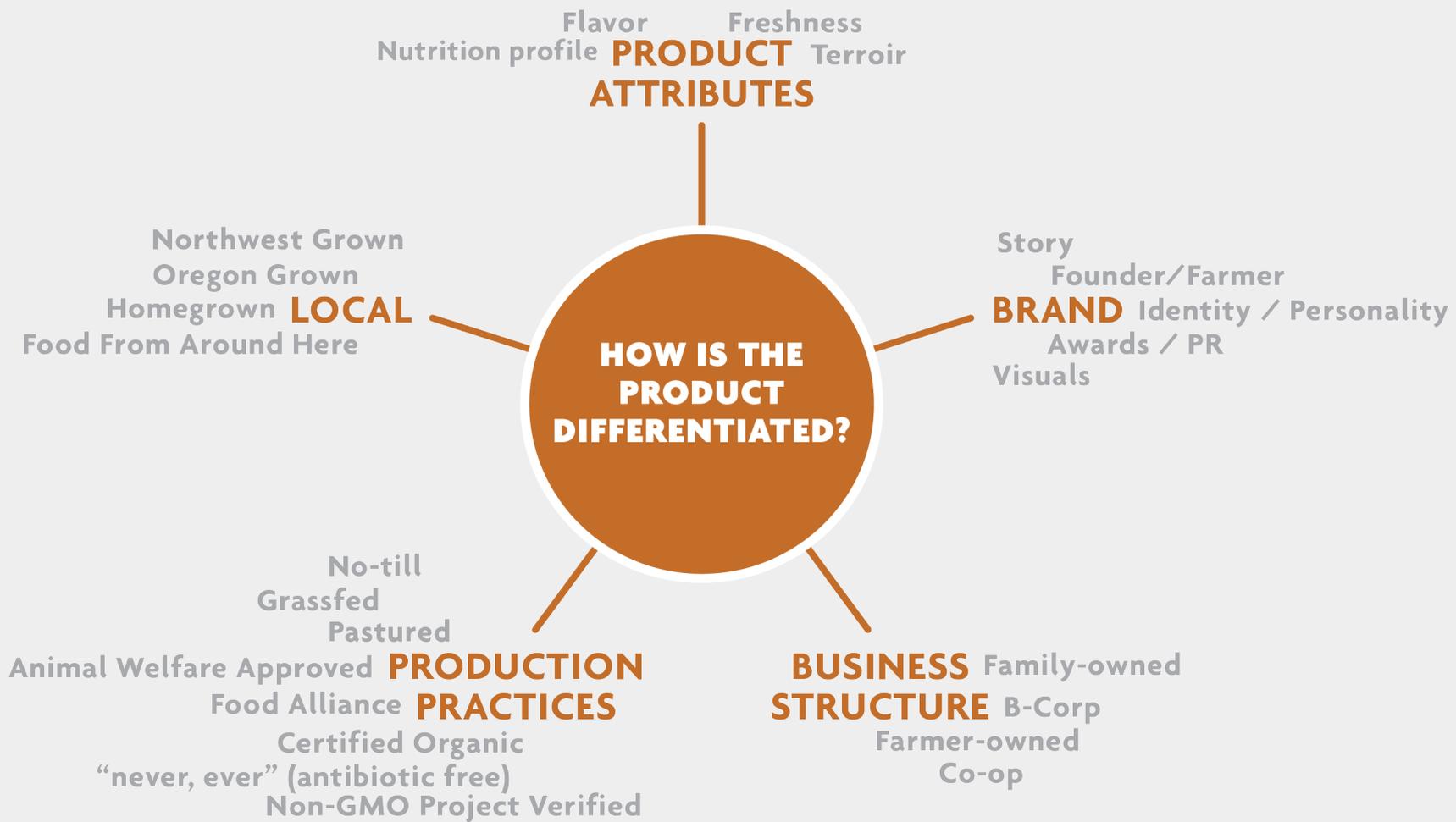
**Local values,
wholesale volume.**

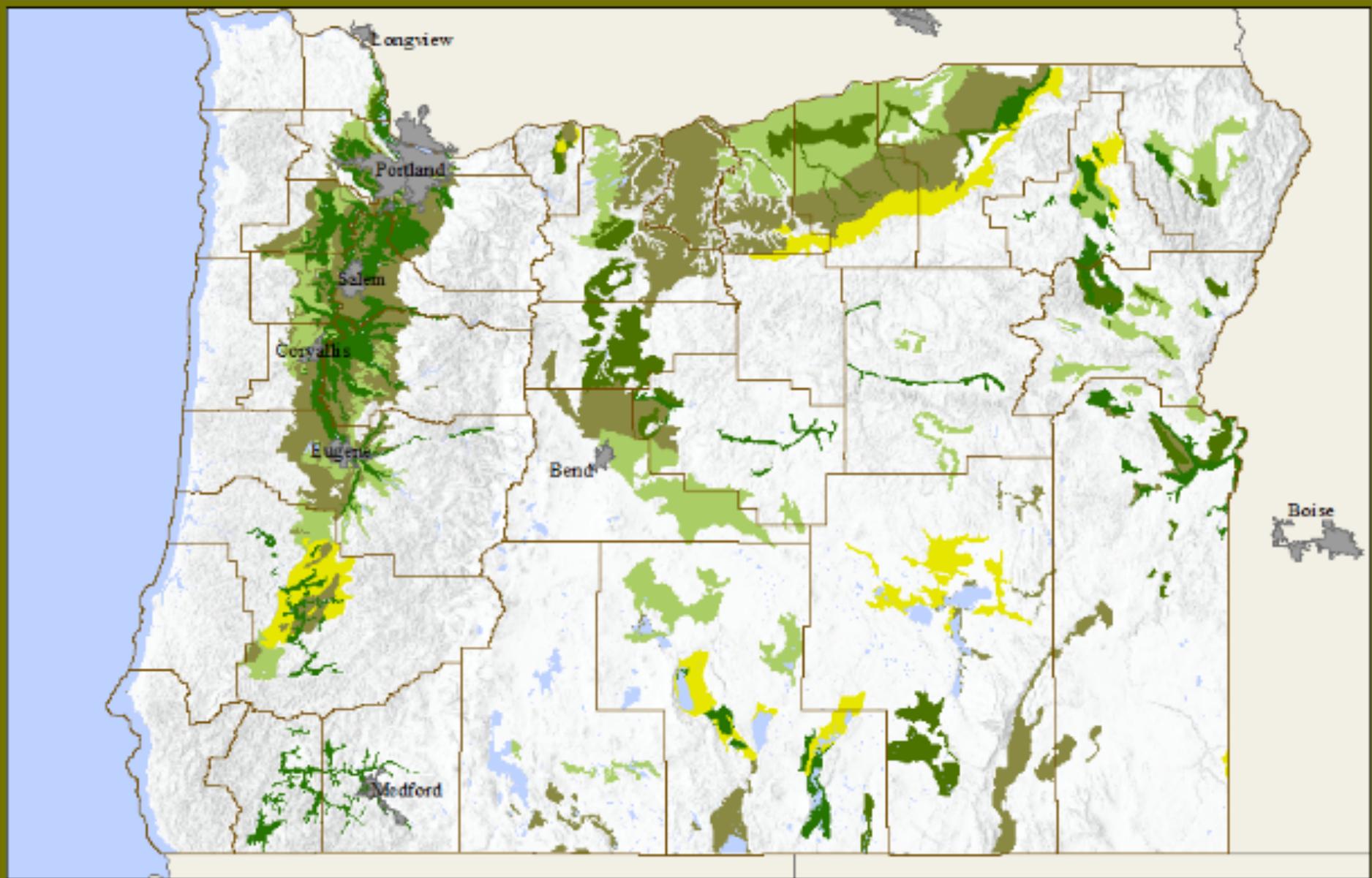


**"I CAN MAKE MORE
BAGELS, BUT I CAN'T
DELIVER ANY
MORE."**

**MICHAEL MADIGAN, FOUNDER &
CEO, BOWERY BAGELS**







Proportion of Prime Farmland



1 - 9%
10 - 19%
20 - 49%

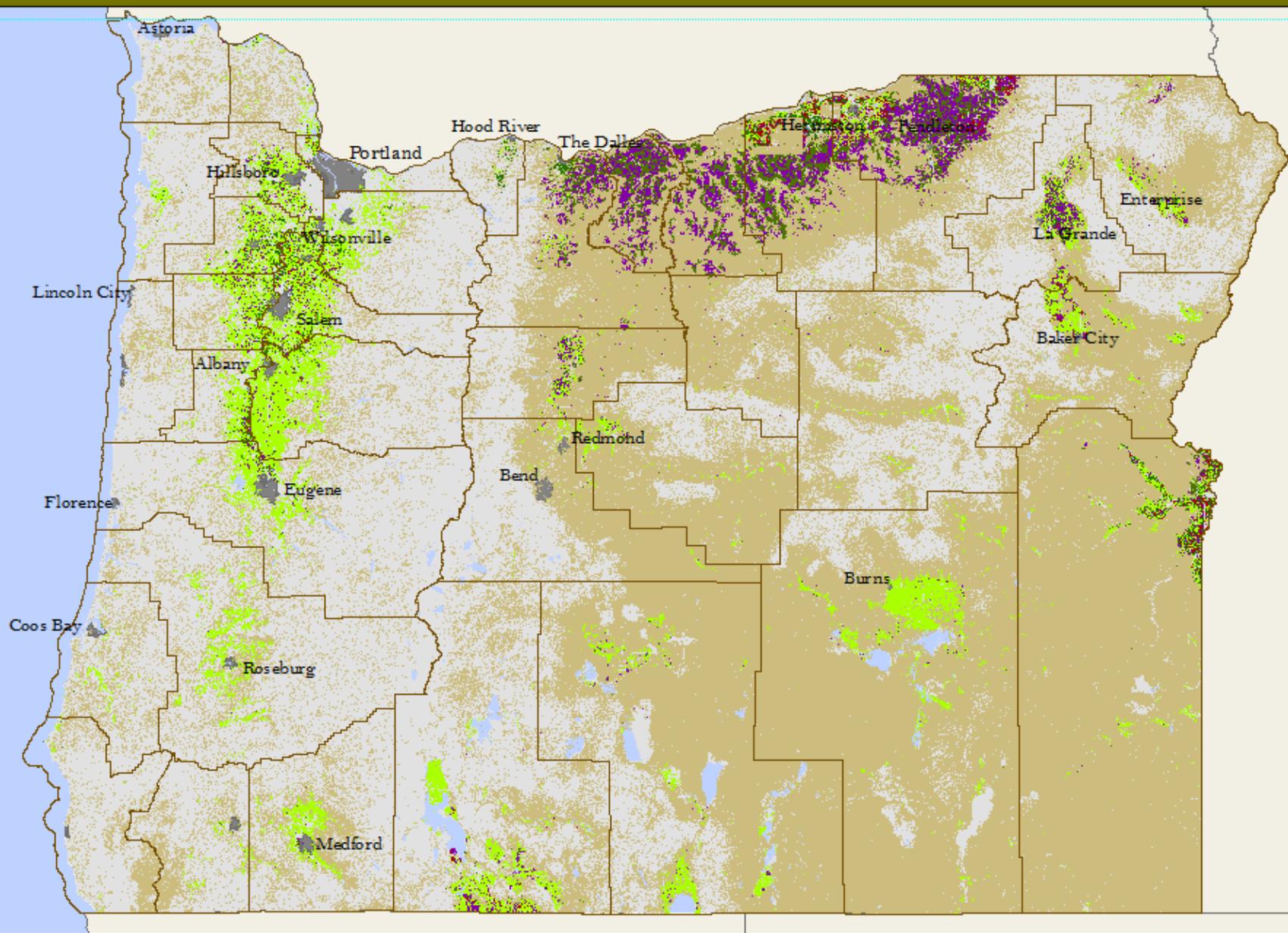


50 - 75%
> 75%
Urban areas



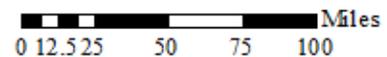
0 12.5 25 50 75 100 Miles

Source: NRCS, STATSGO soil survey



Cropland type

- | | | |
|---|--|--|
|  Fruits, vegetables and nuts |  Small grains |  Non-food crops (irrigated pasture, alfalfa, seed crops, nursery stock and Christmas trees) |
|  Storage crops |  Rangeland |  non-ag |



Source: USDA 2013, Cropland Data Layer, National Agricultural Statistics Service

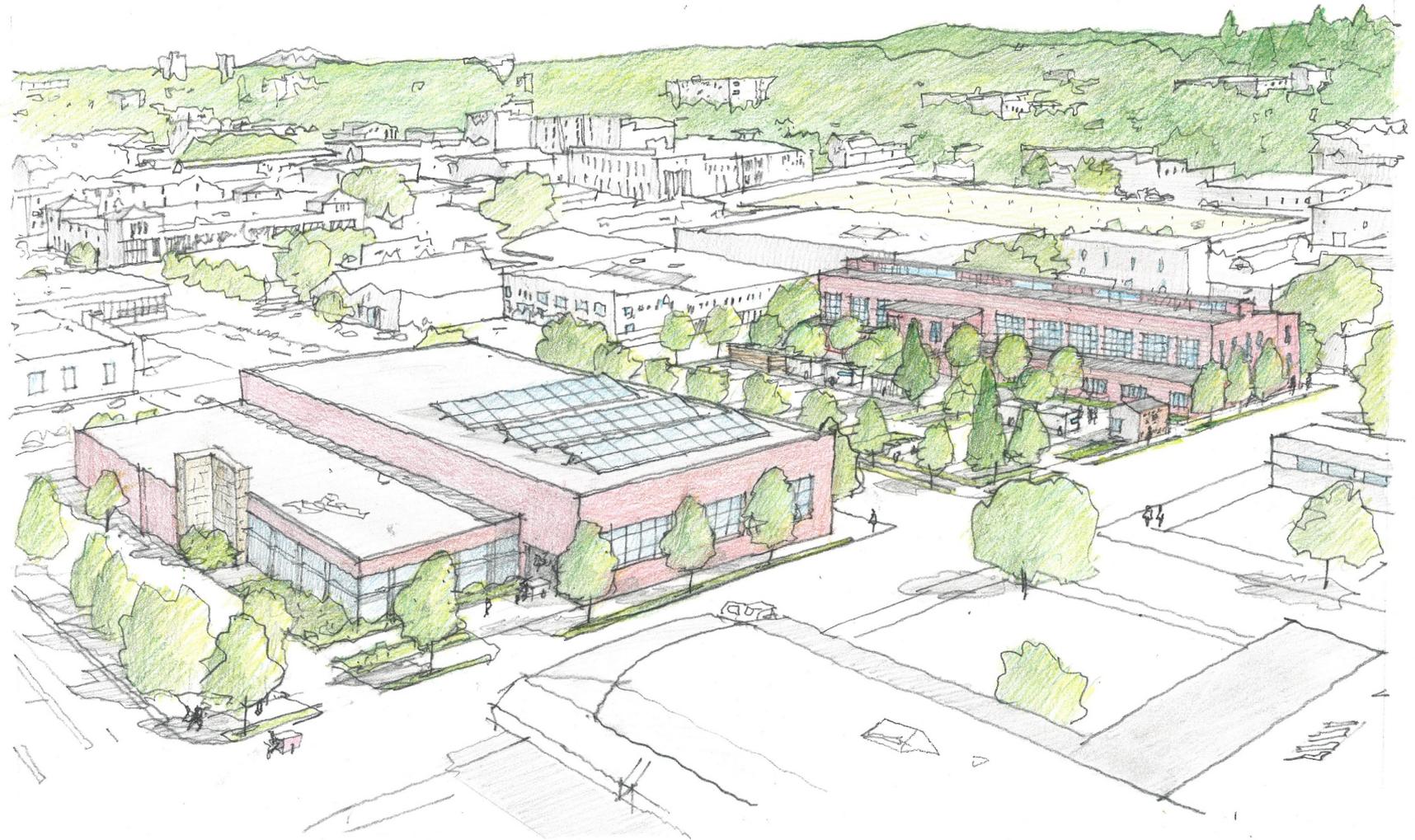
MID-WILLAMETTE VALLEY

- *Fertile soils*
- *Many smaller farms*
- *Close proximity to population centers*
- *Significant cold storage and processing infrastructure, but mostly optimized for commodity*

@ReddonSalmon



URBAN FOOD INFRASTRUCTURE: THE REDD CAMPUS



POTENTIAL OPPORTUNITIES:

- *Product aggregation to feed into Redd, NW Food Buyers' Alliance, other metro buyers*
- *Processing to suit differentiated regional markets –*
 - *smaller quantities*
 - *identity preservation*
 - *flexible pricing frameworks*
 - *certifications*
- *Distributed networks of smaller scale production with high demand attributes*
- *Rotational grains; animal feed*

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Intrepid's Story:

<http://food-hub.org/Intrepid>

Infrastructure Gap Analysis:

<http://www.ecotrust.org/publication/regional-food-infrastructure>

