



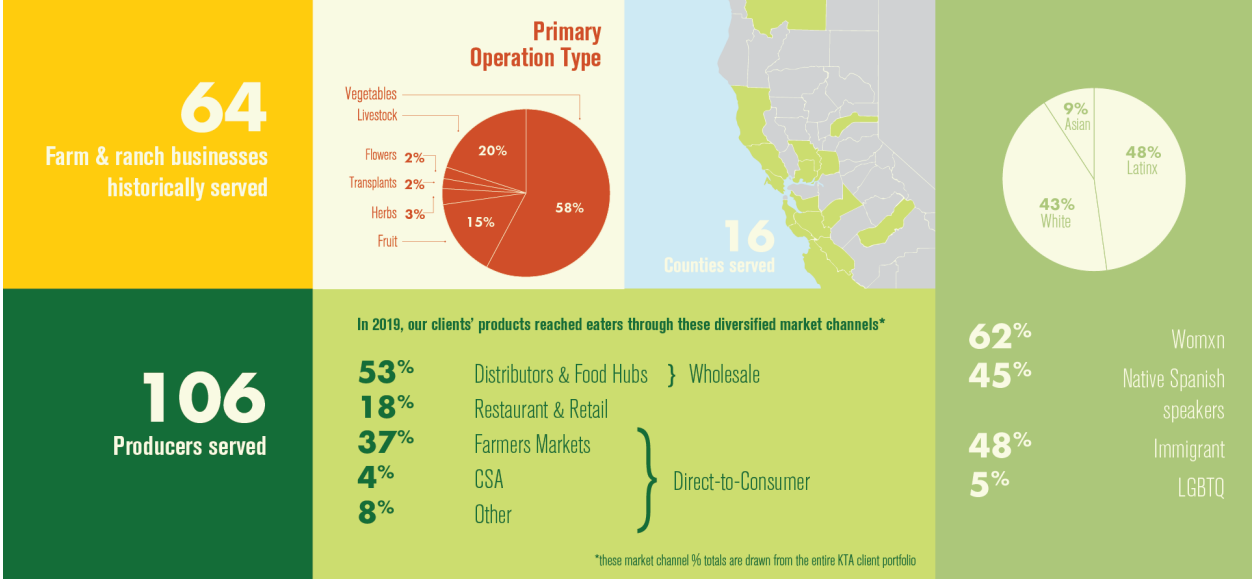
# Increasing **Farmer Access and Power** in Northern California Supply Chains:

## **A Project Plan for 2021 and Beyond**

Executive summary prepared by **Heather Frambach** on behalf of **Kitchen Table Advisors**

Kitchen Table Advisors (KTA) is a not-for-profit organization that fuels the economic viability of sustainable small farms and ranches through practical business advising and relationship building. We believe in a vibrant food system based in community, justice and ecological responsibility, where all farmers and ranchers can thrive. Founded in 2013, we began a program of one-on-one business advising for a handful of organic and regenerative small farms and ranches with the intention of exploring and evaluating the program's impact over a three year period. In the ensuing years, the business advising

model has evolved and flourished into a network of deep partnerships with farmer and rancher clients, with 132 producers served across 89 farm and ranch businesses across four defined Northern California regions. We support farmers and ranchers who use regenerative agricultural practices, enabling them to reach key milestones along their business journey, from hiring their first employees to buying property and beyond. We prioritize work with communities that have historically been excluded from resources, power and visibility within our food system – namely the BIPOC, womxn, low-income, immigrant, and LGBTQ communities.



**Data reflects all clients served in 2020. Image credit: KTA 2019-20 Impact Report**

KTA recognized an opportunity in recent years to expand on our core advising program, seeing that in order to transform our food system into one that enables farmers and ranchers to thrive, we also need to shape the institutions that control key resources such as land, markets and capital. In response, KTA launched an additional programmatic area in 2019: regional ecosystem building. Through this work, KTA seeks to address both the individual viability of small farm businesses while also reaching for deeper structural change through partnership with other organizations in the regions where our clients are

based. Ecosystem building projects KTA has since undertaken focus on reshaping the institutions and processes that influence access to land and capital, meanwhile a more defined programming is emerging specifically related to market access for our clients.

Funded by a USDA Local Food Promotion Program (LFPP) Planning grant, KTA researched the potential for defining the potential parameters and impact of market access programming in 2020. Much like the evolving understanding of land and capital, we utilized a power analysis in our approach to understanding the barriers and opportunities for farmer self-determination and financial health in the Northern California food system. Building on two decades of learnings in the field of **value chain coordination** -- which can be defined as targeted activities that foster transparency, dignity, and trust within supply chains in ways that strengthen regional economies -- and in addition to 8 months of targeted research, we are pleased to present our plan for 2021 and beyond for increasing farmer access and power in Northern California food supply chains. Our intent is to show how the addition of market access (which we use interchangeably with **value chain**) programming to our other core pillars is necessary, timely, and in line with the legacy of generative food system practices. We are not alone in conducting this work, and KTA exists in a rich ecosystem of partners who are strong allies in building wealth for farmers; this plan articulates our specific contribution. This plan also specifically addresses **wholesale** market channels. While direct marketing (e.g. farmers markets, Community Supported Agriculture) are an important part of what many farmers do, we see a compelling opportunity to increase small farmers' access to larger buyer partners and their supply chains.



*Maria Ana Reyes, Narci Organics. Photo credit: Jacque Rupp*

## Methodology

Our research is informed by the following inputs:

- Stakeholder interviews with 19 collaborators, including farmer and rancher leaders, staff at partner organizations, and KTA advisory board members
- In-person interviews with 8 farmers in the Salinas Valley
- An online survey with 9 farmers in other KTA regions
- Virtual interviews with 31 buyer staff across universities, hospitals, restaurants, ecommerce companies, consumer packaged good (CPG) companies, and grocery retailers
- A literature review of academic and practitioner research of regional food systems covering the years 2010-2020

## Key Findings

The scope of this project is primarily in and around Northern California, and seeks to unpack the specific struggles and needs of KTA farmer clients who sell in the wholesale market (i.e., distinct from direct marketing channels such as CSAs and farmers markets), alongside an exploration of the level of understanding and interest of a range of existing and potential buyers for these farmers. Our analysis acknowledges that a salient feature of modern food systems is a structural imbalance of power between producers and buyers. Northern California is a fascinating microcosm of this power structure, wherein some of the world's most powerful tech, health, and agricultural companies dominate the physical, financial, and political landscape just a stone's throw from some of the most disenfranchised growers on some of the world's most productive agricultural land. Farmers' and buyers' experiences and motivations were analyzed through this lens, and strategies are positioned in a way that seeks to empower farmers and ranchers within the status quo, while asserting the need for deeper change to rectify power imbalances in our food system. While the focus is in the Northern California region, the larger intent of the work is to provide a model of value chain coordination complemented by one-on-one business advising that can contribute learnings and successes to efforts elsewhere. Previous attempts of value chain coordination and market facilitation have had varying degrees of success; our strategic plan intends to revitalize the conversation and explore what this work can be and do. In general, our assessment follows the Wallace Center's understanding that the "soft infrastructure" of building and fostering relationships, skills, knowledge, and connections is vital to the development of the "hard infrastructure" of food aggregation, processing, and distribution.

## Visualizing Change

The infographic at the end of this summary illustrates the flow of our analysis. We began by outlining the various channels within the wholesale market: **Consumer Packaged**

**Goods (CPG), Foodservice, Restaurants, Retail + Grocery, Distributors, and Ecommerce.**

Within each channel, we described our farmer and rancher clients' experiences of selling to each buyer type. Farmers evaluated their assessment of each buyer type's **Pricing, Volume + Consistency, Payment Terms, and Overall Relationship**. We then interpreted their assessment and rated the current state of their experience from 1-5, with 1 meaning very poor, and 5 meaning very good. We also assigned an opportunity rating from 1-5, which represents the general potential of the channel in terms of change, if market access programming is successful, with 1 representing very low potential for change and 5 representing very high potential for change.

Next, we evaluated buyers themselves within each channel, based on our extensive interviews with buyer staff and leaders. Similar to the farmer assessment, each buyer was assigned a 1-5 score rating their current state and opportunity score, in the categories of their overall **Knowledge** of regional food systems, **Capability** to engage in processes that benefit KTA clients, and any **Policy** they may have that formally empowers their staff to support regional food systems and/or BIPOC producers. Altogether, the existing state and opportunity scores form the basis of our **Ecosystem Map**, our visual, interactive depiction of this analysis and our vision of market access opportunities.

Finally, we expanded on these assessments and ratings alongside our ongoing conversations with external partners and internal staff to outline **Strategic Recommendations**. Within each channel, we also align strategic recommendations with our systems thinking-informed framework. We understand our interventions, specific to small farmers Northern California, to take place on an axis of change:



## **Coach + Support**

Overall, this strategy is about small, achievable, tactical actions that help farmers achieve sales within the existing status quo, especially when paired with KTA's core business advising programming. This can include quick matchmaking with buyers looking for specific products and relationships, supporting farmers with improving their pitches and short-term sales strategy, and networking to learn more about the current landscape of opportunities.

## **Innovate**

This strategy goes a step beyond Coach + Support, involving some creation of new processes and pilots in partnership with buyers - both new and existing - and end customers. For example, a pilot from a foodservice buyer that sets aside a specified budget to support regional farmers, an expansion of a direct purchasing program within a retail chain, or a new food safety policy that provides meaningful support for smaller, less experienced farmers.

## **Organize**

This part of the spectrum of strategies is about investing people power into organizing farmers in the marketplace, by supporting production planning, raising capital for hard infrastructure, and influencing buyers to fundamentally change their purchasing practices in ways that include farmer participation in major process change. It can also include direct involvement in food aggregation, processing, and distribution projects that center farmer and rancher governance, such as strengthening existing food hubs like Capay Valley Farm Shop and FEED Sonoma. These strategies, aimed at institutional change, are directly linked to KTA's regional ecosystem building work.

## Staff and Infrastructure

Going forward, KTA sees the opportunity to invest in increased staffing capacity for this very specialized work that goes beyond our core, one-on-one business advising. The increased people power will foster the aforementioned “soft infrastructure” of matchmaking, targeted producer support, and planning while building capacity and potential for supporting farmer and rancher-centered “hard infrastructure.” In future years, market access programming will expand as opportunities evolve, with particular support for programs in the Salinas Valley region, where farmers are almost exclusively wholesale-oriented.



*Bertha Magaña, Magaña Farm. Photo credit: Bryan Patrick*



## Next Steps for 2021 and Beyond

As of January 2021, KTA began implementing many of the strategic recommendations identified above, in collaboration with internal staff, farmer and rancher clients, and external partners. Mirroring our existing approach to regionally-focused programming paired with cross-regional learning and sharing, we are in the midst of developing targeted plans for each regional subset of producers that will also encourage overlapping efforts to emerge. For example, we have already identified buyers who wish to work with growers from multiple regions, found opportunities to upgrade and combine logistics, and are honing in on new and impactful opportunities to match clients with buyer initiatives around supporting regenerative agriculture, BIPOC growers, and direct purchasing from regional growers.

Our market access work will evolve alongside KTA's core advising program and the other pillars of our investment in ecosystem building, forming a cohesive approach to institution-level change. We envision this programming to form an important piece of the infrastructure KTA is developing with partners across our network to build meaningful wealth and change for farmers and ranchers, such that the dynamics of our regional food system can be reorganized and rebalanced. We continue to proudly share this work with you, our community of stakeholders and partners, and invite you to join us on our journey to increase farmer and rancher power in our food system.

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***Header photo credit: Bryan Patrick***

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# Mapping Market Access Farmer & Buyer Opportunities

Coach & Support Innovate Organize

