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Tools for Community Self-determination

The Golden Triangle (Montana) Local Farm & Food Economy

Highlights of a data compilation

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for

Montana Farmers Union
September 6, 2011

Covers Cascade, Chouteau, Glacier, Hill, Liberty, Pondera, Teton, & Toole Counties in Montana

The Golden Triangle Region (Bureau of Economic Analysis, 2009)

136,328 residents receive \$4.9 billion of income annually. The two largest sources of personal income are capital income (interest, rent or dividend income), at \$1.1 billion, and transfer payments (from government programs such as pensions), at \$1 billion. These capital transfers account for over 40% of personal income.

The largest source of personal income from employment is government jobs, where workers earn a total of \$1 billion. Retail jobs rank fourth, with \$200 million of personal income. Other private sources of income cannot be reported fully since so much of this data has been suppressed to protect the confidentiality of local firms.

The region's population declined 1% from 137,429 in 1969. Forty years ago, the Golden Triangle region held 20% of the state's population; now it has 14% of the Montana population. Personal income has risen 69% during the same period (adjusted for inflation). Despite this increase in personal income, and rising consumer expenditures for food, farm income is falling, and very little planning has been devoted to ensuring a secure food supply for Golden Triangle residents.

¹ Nick Wojciak, intern for Crossroads Resource Center, contributed considerable research to this report.

Issues affecting low-income residents of the region:

44,744 Golden Triangle residents (34%) earn less than 185% of federal poverty guidelines. At this level of income, children qualify for free or reduced-price lunch at school. These lower-income residents spend \$90 million each year buying food, including \$26 million of SNAP benefits (Supplemental Nutrition Assistance Program, formerly known as food stamps) and additional millions in WIC (Women, Infants and Children) coupons. The region's farmers receive a combined total of \$175 million in subsidies (thirty-one-year average, 1979-2009), mostly to raise crops such as wheat and barley that are sold as commodities, not to feed local residents. *Data from Federal Census American Community Survey, 2005-2009, Bureau of Labor Statistics, & Bureau of Economic Analysis.*

9% of Golden Triangle households (more than 12,250 residents) earn less than \$10,000 per year. *Source: Federal Census; American Community Survey, 2005-2009.*

23% of adults aged 18-64 in Montana have no health insurance (2010). *Source: Centers for Disease Control. Data on health conditions is reported for the state and for metro areas only.*

Food-related health conditions:

7% of Montana residents have been diagnosed with diabetes as of 2010. *Source: Centers for Disease Control.* Medical costs for treating diabetes and related conditions in the Golden Triangle are estimated at \$79 million per year; for the state of Montana the total is \$563 million. *Source: American Diabetes Association cost calculator.*

62% of Montana residents were overweight (38%) or obese (24%) in 2010. *Source: Centers for Disease Control.*

59% of Montana adults reported in 2009 they have at least 30 minutes of moderate physical activity five or more days per week, or vigorous physical activity for 20 or more minutes three or more days per week. *Source: Centers for Disease Control.*

26% of state residents reported in 2009 that they eat five or more servings of fruit or vegetables each day. 74% do not. This is a key indicator of health, since proper fruit and vegetable consumption has been connected to better health outcomes. *Source: Centers for Disease Control.*

The region's farms (Agricultural Census, 2007)
Agricultural Census data for 2007 were released February 4, 2009

The Census of Agriculture defines a "farm" as "an operation that produces, or would normally produce and sell, \$1,000 or more of agricultural products per year."

Land:

- 5,479 farms. This is 19% of Montana farms.
- The Golden Triangle region had 8% more farms in 2007 than in 2002. Some of this may be due to census takers making better contact with small farms.
- 2,424 (44%) of these are 1,000 acres or more in size.
- 743 (14%) farms are less than 50 acres.
- Average farm size is 2,039 acres, less than the state average of 2,079 acres.
- The region has 11 million acres of land in farms.
- This amounts to 18% of the state's farmland.
- Golden Triangle region holds 11 million acres of harvested cropland.
- 289,000 of these acres are irrigated.
- Average value of land and buildings per farm was \$1.4 million. This was less than the Montana average of \$1.6 million.

Sales:

With the exception of foods sold directly to consumers (see below), farmers typically sell commodities to wholesalers, brokers or manufacturers that require further processing or handling to become consumer items. The word "commodities" is used in this report to mean the crops and livestock sold by farmers through these wholesale channels. The term "products" encompasses commodity sales, direct sales, and any other sales.

- The region's farmers sold \$643 million of crops and livestock in 2007.
- Farm product sales increased by 74% from 2002 to 2007.
- \$430 million of crops were sold (67% of sales).
- \$213 million of livestock and products were sold (33% of sales).
- 2,646 (48%) of the region's farms sold less than \$10,000 of products in 2007.
- Total sales from these small farms were at least \$2.9 million, more than 0.5% of the region's farm product sales. *Note that data for sales less than \$10,000 in Liberty County were suppressed by the USDA in an effort to protect confidentiality, so this total and percentage are incomplete.*
- 1,602 (29%) of the region's farms sold more than \$100,000 of products.
- Total sales from these larger farms were \$585 million, 91% of the region's farm product sales.
- 38% of the region's farms (2,076 of 5,479) reported net losses in 2007. This is less than the Montana average of 49%.
- 3,786 (69%) of Golden Triangle region's farmers collected a combined total of \$90 million of federal subsidies in 2007.

Top farm products for the Golden Triangle Region

	\$ millions
Wheat	352
Cattle & calves	164
Barley	55
Hogs & pigs**	24
Forage**	13
Milk & Dairy**	12
Poultry & Eggs**	4
Sheep & goats**	2
Other grains/edible beans**	2

*Note that the total value of products marked with asterisks (**) are incomplete due to data suppression by USDA intended to protect confidentiality. Because of limited data availability, the chart above shows only 97% of the value of farm products sold by Golden Triangle farmers in 2007.*

Production Expenses:

- Fertilizer, lime, and soil conditioners were the largest single expense for Golden Triangle region farmers in 2007, totaling \$78 million (14% of production expenses).
- Depreciation ranked as the second most important expense, at \$67 million (12%).
- Gasoline, fuels, and oils totaled \$52 million (9%).
- Feed purchases cost farmers \$50 million (9%).
- Land and building rental totaled \$49 million (9%).
- Supplies, repairs, and maintenance costs totaled \$49 million (9%).
- Chemical purchases cost \$48 million (9%).
- Interest expenses were \$39 million (7%).

Cattle & Dairy:

- 1,818 farms hold an inventory of 306,000 cattle.
- 227,000 cattle were sold by farmers in 2007 for total sales of \$164 million.
- 1,674 farms raise beef cows.
- 55 farms raise milk cows.
- 15 farms produced at least 15,000 tons of corn for silage on at least 1,054 acres. *Note that data for tons and acreage of corn for silage in Hill and Pondera counties were suppressed by the USDA in an effort to protect confidentiality so these totals are incomplete.*
- 1,661 farms produced 561,000 tons of forage crops (hay, etc.) on 317,000 acres.
- 896 farms sold at least \$13 million of forage. *Note that data for sales of forage crops were suppressed in Chouteau and Toole counties, so this total is incomplete.*

Other Livestock & Animal Products:

- 96 farms hold an inventory of at least 117,000 hogs and pigs. *Note that data for inventory of hogs and pigs in Chouteau and Hill counties were suppressed by the USDA in an effort to protect confidentiality, so this total is incomplete.*
- 116 farms sold at least 219,000 hogs and pigs in 2007, worth at least \$24 million. *Note that data for number of hogs and pigs sold and sales value of hogs and pigs sold in Chouteau and Hill counties were suppressed by the USDA in an effort to protect confidentiality, so these totals are incomplete.*
- 149 farms hold an inventory of 23,000 sheep and lambs.
- 157 farms sold at least \$2 million worth of sheep, goats, and lambs in 2007. *Note that data for sales of sheep, goats, and lambs in Liberty County were suppressed by the USDA in an effort to protect confidentiality, so this total is incomplete.*
- 182 farms hold an inventory of 220,000 laying hens.
- 28 farms raise broiler chickens.
- 1 farm engages in aquaculture.
- 246 farms raise horses and ponies.

Grains, Oil Seeds, & Edible Beans:

- 2,055 farms produced \$411 million of grains, oil seeds, and edible beans.
- 1,886 farms produced 65 million bushels of wheat on 2 million acres, worth \$352 million.
 - 1,491 farms produced 52 million bushels of winter wheat on 1.3 million acres.
 - 1,073 farms produced at least 10 million bushels of spring wheat on at least 514,000 acres. *Note that data for bushels and acreage of spring wheat in Cascade and Liberty counties were suppressed by the USDA in an effort to protect confidentiality, so these totals are incomplete.*
 - 65 farms produced at least 581,000 bushels of durum wheat on at least 21,000 acres. *Note that data for bushels and acreage of spring wheat in Cascade and Liberty counties were suppressed by the USDA in an effort to protect confidentiality, so these totals are incomplete.*
- This amounts to an average price per bushel for wheat of \$5.42. *Note that this price is an approximation, and does not necessarily represent an actual price at which wheat was sold.*
- The total value of wheat amounted to 55% of all farm product sales in 2007.
- 847 farms produced 15 million bushels of barley on 407,000 acres, worth \$55 million.
- The total value of barley amounted to 9% of all farm product sales in 2007.

Vegetable & Melons (some farmers state that Ag Census data does not fully represent vegetable production):

- 32 farms worked at least 177 acres to produce vegetables. *Note that data for acreage of vegetables in Chouteau and Toole counties were suppressed in an effort to protect confidentiality, so this total is incomplete.*
- 25 of these farms raised at least 45 acres of potatoes. *Note that data for acreage of potatoes in Chouteau, Hill, Pondera, and Toole counties were suppressed by the USDA in an effort to protect confidentiality, so this total is incomplete.*

Fruits (some farmers state that Ag Census data does not fully represent fruit production):

- 1 farm in the region maintains orchards.
- 8 farms sold fruits, nuts and berries.

Nursery & Greenhouse Plants:

- 27 farms sold at least \$1.5 million worth of ornamentals in 2007. *Note that data for sales of ornamentals in Chouteau, Hill, Liberty, and Teton counties are suppressed by the USDA in an effort to protect confidentiality, so this total is incomplete.*
- This represents an increase of 80% in the number of farms (from 15) over 2002.

Direct & Organic Sales:

- 173 farms sold \$1.1 million of food products directly to consumers. This is an 18% increase of amount of farms (146 in 2002) selling direct over 2002 and an 18% increase in direct sales over 2002 sales of \$957,000.
- This amounts to 0.2% of farm product sales, one half the national average of 0.4%.
- Cascade County leads the region in direct sales, with \$272,000.
- 28 farms in the region sold \$1.3 million of organic products, accounting for 15% of Montana's organic sales.
- For comparison, 207 farms in Montana sold \$8.8 million of organic food products.
- 20 farms market through community supported agriculture (CSA).
- 176 farms produce and sell value-added products.

Conservation Practices:

- 1,928 farms use conservation methods such as no-till, limited tilling, filtering field runoff to remove chemicals, fencing animals to prevent them from entering streams, etc.
- 1,151 farms practice rotational or management intensive grazing.
- 65 farms generate energy or electricity on the farm.

**Limited-resource farms and others in the Golden Triangle region
(Census of Agriculture, 2007)**

	Farms	Percent	Acres	Percent
Small Family Farms				
Limited Resource	559	10%	359,643	3%
Retirement	850	16%	680,508	6%
Residential/lifestyle	1,615	29%	931,637	8%
Farming occupation/lower sales	884	16%	1,180,407	11%
Farming occupation/higher sales	734	13%	2,353,879	21%
Large family farms	468	9%	2,270,567	20%
Very large family farms	205	4%	2,099,434	19%
Nonfamily farms	164	3%	1,295,346	12%
Totals	5,479		11,171,421	

Following are the definitions used by USDA in reporting data for the table above.

1. Rural residence farms. Specific typologies included in rural residence farms are *limited-resource, retirement, and residential lifestyle farms*.

- *Limited-resource farms.* Small farms with sales less than \$100,000 in 2003 and low operator household income in 2003 and 2004. Household income is low if it is less than the poverty level in both 2003 and 2004 or if it is less than half the county median income both years.
- *Retirement farms.* Small farms whose operators report they are retired (excludes limited-resource farms operated by retired farmers).
- *Residential/lifestyle farms.* Small farms whose operators report they had a major occupation other than farming (excludes limited-resource farms with operators reporting a non-farm major occupation).

2. Intermediate farms. Includes *farming occupation/lower-sales* and *farming occupation/higher-sales* farms.

- *Farming occupation/low-sales.* Small farms with sales less than \$100,000 whose operators report farming as their major occupation (excludes limited-resource farms whose operators report farming as their major occupation).
- *Farming occupation/high-sales.* Small farms with sales between \$100,000 and \$249,999 whose operators report farming as their major occupation.

3. Commercial farms. Includes *large, very large, and nonfamily* farms.

- *Large family farms.* Farms with sales between \$250,000 and \$499,999.
- *Very large family farms.* Farms with sales of \$500,000 or more.
- *Nonfamily farms.* Farms organized as non-family corporations or cooperatives, as well as farms operated by hired managers.

County Highlights

Cascade County highlights (Census of Agriculture 2007):

- 1,112 farms, 7% more than in 2002.
- Cascade County has 1.4 million acres of land in farms.
- Farmers sold \$84 million of products in 2007.
- \$41 million (49%) of these sales were crops.
- \$43 million (51%) of these sales were livestock.
- The most prevalent farm size is 1,000 acres or more with 275 farms (25%) in this category.
- The next most prevalent is 10 to 49 acres with 266 (24%) farms.
- 339 farms (30%) are less than 50 acres.
- 695 farms (63%) sold less than \$10,000 in farm products.
- 170 farms (15%) sold more than \$100,000 in farm products.
- 59 farms sold \$272,000 of food directly to consumers. This is an 18% increase in the number of farms selling direct (50 in 2002), and a 3% decrease in direct sales from 2002 sales of \$279,000.
- Direct sales were 0.3% of farm product sales, less than the national average of 0.4%.
- Cascade County ranks 1st in Montana for sales of poultry and eggs, with \$742,000.
- The county ranks 1st in Montana for inventory of laying hens, with 52,000.
- Cascade County ranks third in the state for acreage of Christmas trees, with 604.
- The county ranks 3rd in the state for inventory of pullets for laying flock replacement, with 15,000.
- Cascade County ranks 4th in Montana for milk sales, with \$3 million.
- The county ranks fourth in Montana for inventory of hogs and pigs, with 17,000.
- Cascade County ranks 4th in the state for inventory of broiler chickens, with 10,000.
- The county ranks 5th in the state for sales of hogs and pigs, with \$3 million.
- Cascade County ranks sixth in Montana for aquaculture sales, but *sales figures for aquaculture were not released by the USDA in an effort to protect confidentiality.*
- The county ranks 7th in Montana for sales of ornamentals, with \$1.4 million.
- Cascade County ranks 7th in the state for acreage of barley, with 28 million.
- The county ranks eighth in the state for sales of fruits nuts and berries, with \$26,000.
- Cascade County ranks 8th in Montana for acreage of forage, with 84,000.
- The county ranks 9th in the Montana for sales of sheep and goats, with \$616,000.
- Cascade County ranks 10th in the state for livestock and poultry sales.

Chouteau County highlights (Census of Agriculture 2007):

- 849 farms, 8% more than in 2002.
- Chouteau County has 2.3 million acres of land in farms.
- Farmers sold \$147.2 million of products in 2007.
- \$123.7 million (84%) of these sales were crops.
- \$23.5 million (16%) of these sales were livestock.
- The most prevalent farm size is 1,000 acres or more with 523 farms (62%) in this category.
- The next most prevalent is 180 to 499 acres with 127 (15%) farms.
- 40 farms (5%) are less than 50 acres.
- 315 farms (37%) sold less than \$10,000 in farm products.
- 378 farms (45%) sold more than \$100,000 in farm products.

- 18 farms sold \$112,000 of food directly to consumers. There was no change in the number of farms selling direct since 2002, and a 143% increase in direct sales over 2002 sales of \$46,000.
- Direct sales were 0.1% of farm product sales, one quarter the national average of 0.4%.
- Chouteau County ranks 1st in Montana and 1st in the U.S. for acreage of wheat, with 496,000.
- The county ranks 1st in Montana for sales of grains, oilseeds, and dry beans and peas, with \$121 million.
- Chouteau County ranks first in the state for crop sales.
- The county ranks 2nd in the state for sales of agricultural products.
- Chouteau County ranks 5th in Montana for acreage of barley, with 39,000.
- The county ranks seventh in Montana for sales of vegetables, but *sales figures were not released by the USDA in an effort to protect confidentiality*.
- Chouteau County ranks 8th in the state for sales of horses and ponies, with \$455,000.
- The county ranks 8th in the state for acreage of safflower, with 1,322.

Glacier County highlights (Census of Agriculture 2007):

- 625 farms, 32% more than in 2002.
- Glacier County has 1.7 million acres of land in farms.
- Farmers sold \$55.4 million of products in 2007.
- \$22.8 million (41%) of these sales were crops.
- \$32.6 million (59%) of these sales were livestock.
- The most prevalent farm size is 1,000 acres or more with 251 farms (40%) in this category.
- The next most prevalent is 180 to 499 acres with 120 (19%) farms.
- 86 farms (14%) are less than 50 acres.
- 316 farms (51%) sold less than \$10,000 in farm products.
- 124 farms (20%) sold more than \$100,000 in farm products.
- 10 farms sold \$122,000 of food directly to consumers. This is a 23% decrease in the number of farms selling direct (13 in 2002), and a 1% decrease in direct sales from 2002 sales of \$123,000.
- Direct sales were 0.2% of farm product sales, one half the national average of 0.4%.
- Glacier County ranks 1st in Montana and 2nd in the U.S. for acreage of Austrian winter peas, but *acreage figures were not released by the USDA in an effort to protect confidentiality*.
- The county ranks 1st in Montana and 3rd in the U.S. for acreage of barley for grain, with 103,000.
- Glacier County ranks second in the state for sales of hogs and pigs, with \$5 million.
- The county ranks 2nd in the state for sales of poultry and eggs, with \$739,000.
- Glacier County ranks 2nd in Montana for inventory of laying hens, with 36,000.
- The county ranks second in Montana for inventory of hogs and pigs, with 25,000.
- Glacier County ranks 2nd in the state for inventory of pullets for laying flock replacement, with 17,000.
- The county ranks 3rd in the state for inventory of broiler chickens, with 12,000.
- Glacier County ranks fifth in Montana for milk sales, with \$2.5 million.

Hill County highlights (Census of Agriculture 2007):

- 854 farms, 2% more than in 2002.
- Hill County has 1.7 million acres of land in farms.

- Farmers sold \$87 million of products in 2007.
- \$71 million (82%) of these sales were crops.
- \$16 million (18%) of these sales were livestock.
- The most prevalent farm size is 1,000 acres or more with 395 farms (46%) in this category.
- The next most prevalent is 50 to 179 acres with 166 (19%) farms.
- 58 farms (7%) are less than 50 acres.
- 436 farms (51%) sold less than \$10,000 in farm products.
- 252 farms (30%) sold more than \$100,000 in farm products.
- 22 farms sold \$176,000 of food directly to consumers. This is a 47% increase in the number of farms selling direct (15 in 2002), and a 214% increase in direct sales over 2002 sales of \$56,000.
- Direct sales were 0.2% of farm product sales, one half the national average of 0.4%.
- Hill County ranks 2nd in Montana and 3rd in the U.S. for acreage of wheat, with 413,000.
- The county ranks 3rd in the Montana for crop sales.
- Hill County ranks third in the state for sales of grains, oilseeds, and dry beans and peas, with \$69 million.
- The county ranks 5th in the state for inventory of broiler chickens, but *inventory figures were not released by the USDA in an effort to protect confidentiality.*
- Hill County ranks 7th in Montana for sales of hogs and pigs, but *sales figures were not released by the USDA in an effort to protect confidentiality.*
- The county ranks seventh in Montana for acreage of oats for grain, with 1,336.
- Hill County ranks 7th in the state for inventory of hogs and pigs, but *inventory figures were not released by the USDA in an effort to protect confidentiality.*
- The county ranks 9th in the state for sales of agricultural products.
- Hill County ranks ninth in Montana for inventory of laying hens, with 15,000.
- The county ranks 10th in Montana for sales of poultry and eggs, with \$361,000.
- Hill County ranks 10th in the state for acreage of barley, with 24,000.
- The county ranks tenth in the state for inventory of pullets for laying flock replacement, but *inventory figures were not released by the USDA in an effort to protect confidentiality.*

Liberty County highlights (Census of Agriculture 2007):

- 299 farms, 1% more than in 2002.
- Liberty County has 904,000 acres of land in farms.
- Farmers sold \$49.6 million of products in 2007.
- \$37.4 million (75%) of these sales were crops.
- \$12.2 million (25%) of these sales were livestock.
- The most prevalent farm size is 1,000 acres or more with 206 farms (69%) in this category.
- The next most prevalent is 500 to 999 acres with 38 (13%) farms.
- 6 farms (2%) are less than 50 acres.
- 98 farms (33%) sold less than \$10,000 in farm products.
- 138 farms (46%) sold more than \$100,000 in farm products.
- 6 farms sold \$110,000 of food directly to consumers. This is a 40% decrease in the number of farms selling direct (10 in 2002), and a 6% increase in direct sales over 2002 sales of \$104,000.
- Direct sales were 0.2% of farm product sales, one half the national average of 0.4%.
- Liberty County ranks 2nd in Montana for inventory of broiler chickens, with 13,000.
- The county ranks 3rd in Montana for sales of hogs and pigs, with \$3.5 million.

- Liberty County ranks third in the state for inventory of hogs and pigs, with 18,000.
- The county ranks 5th in the state for sales of poultry and eggs, with \$636,000.
- Liberty County ranks 6th in Montana for inventory of laying hens, with 27,000.
- The county ranks sixth in Montana for inventory of pullets for laying flock replacement, with 13,000.
- Liberty County ranks 7th in the state for acreage of wheat, with 250,000.
- The county ranks 8th in the state for milk sales, with \$1.7 million.
- Liberty County ranks ninth in Montana for acreage of lentils, but *acreage figures were not released by the USDA in an effort to protect confidentiality*.
- The county ranks 10th in Montana for sales of grains, oilseeds, and dry beans and peas, with \$37 million.

Pondera County highlights (Census of Agriculture 2007):

- 542 farms, 4% more than in 2002.
- Pondera County has 944,000 acres of land in farms.
- Farmers sold \$75 million of products in 2007.
- \$48 million (64%) of these sales were crops.
- \$27 million (36%) of these sales were livestock.
- The most prevalent farm size is 1,000 acres or more with 257 farms (47%) in this category.
- The next most prevalent are both 180 to 499 and 500 to 999 acres with 75 (14%) farms each.
- 76 farms (14%) are less than 50 acres.
- 198 farms (37%) sold less than \$10,000 in farm products.
- 201 farms (37%) sold more than \$100,000 in farm products.
- 22 farms sold \$152,000 of food directly to consumers. This is an 83% increase in the number of farms selling direct (12 in 2002), and a 20% decrease in direct sales over 2002 sales of \$190,000.
- Direct sales were 0.2% of farm product sales, one half the national average of 0.4%.
- Pondera County ranks 1st in Montana for sales of hogs and pigs, with \$6.3 million.
- The county ranks 1st in Montana for inventory of hogs and pigs, with 27 million.
- Pondera County ranks first in the state for inventory of pullets for laying flock replacement, with 17,000.
- The county ranks 2nd in the state and 6th in the U.S. for acreage of barley, with 75,000.
- Pondera County ranks 3rd in Montana for sales of poultry and eggs, with \$711 million.
- The county ranks third in Montana for inventory of laying hens, with 35,000.
- Pondera County ranks 5th in the state for sales of grains, oilseeds, and dry beans and peas, with \$47 million.
- The county ranks 6th in the state for milk sales, with \$2.5 million.
- Pondera County ranks seventh in Montana for crop sales.
- The county ranks 7th in Montana for acreage of field and grass seed, but *acreage figures were not released by the USDA in an effort to protect confidentiality*.
- Pondera County ranks 7th in the state for inventory of broiler chickens, with 7,600.
- The county ranks 10th in the state for acreage of wheat, with 184,000.

Teton County highlights (Census of Agriculture 2007):

- 770 farms, 10% more than in 2002.
- Teton County has 1.2 million acres of land in farms.

- Farmers sold \$98 million of products in 2007.
- \$51 million (52%) of these sales were crops.
- \$47 million (48%) of these sales were livestock.
- The most prevalent farm size is 1,000 acres or more with 265 farms (34%) in this category.
- The next most prevalent is 180 to 499 acres with 162 (21%) farms.
- 115 farms (15%) are less than 50 acres.
- 393 farms (51%) sold less than \$10,000 in farm products.
- 204 farms (26%) sold more than \$100,000 in farm products.
- 24 farms sold \$106,000 of food directly to consumers. This is a 33% increase in the number of farms selling direct (18 in 2002), and an 8% decrease in direct sales since 2002 sales of \$115,000.
- Direct sales were 0.1% of farm product sales, one quarter the national average of 0.4%.
- Teton County ranks 1st in Montana for inventory of broiler chickens, with 18,000.
- The county ranks 3rd in Montana and 10th in the U.S. for acreage of barley, with 64,000.
- Teton County ranks fifth in the state for sales of agricultural products.
- The county ranks 5th in the state for inventory of laying hens, with 31,000.
- Teton County ranks 5th in Montana for inventory of pullets for laying flock replacement, with 13,000.
- The county ranks sixth in Montana for crop sales.
- Teton County ranks 6th in the state for sales of grains, oilseeds, and dry beans and peas, with \$46 million.
- The county ranks 6th in the state for sales of hogs and pigs, with \$2.8 million.
- Teton County ranks sixth in Montana for acreage of dry edible beans, with 4,751.
- The county ranks 6th in Montana for inventory of hogs and pigs, with 13,000.
- Teton County ranks 8th in the state for livestock and poultry sales.
- The county ranks eighth in the state for sales of poultry and eggs, with \$461 million.
- Teton County ranks 8th in Montana for sales of cattle and calves, with \$41 million.

Toole County highlights (Census of Agriculture 2007):

- 428 farms, 6% more than in 2002.
- Toole County has 1.1 million acres of land in farms.
- Farmers sold \$48 million of products in 2007.
- \$35 million (73%) of these sales were crops.
- \$13 million (27%) of these sales were livestock.
- The most prevalent farm size is 1,000 acres or more with 252 farms (59%) in this category.
- The next most prevalent is 500 to 999 acres with 66 (15%) farms.
- 23 farms (5%) are less than 50 acres.
- 195 farms (46%) sold less than \$10,000 in farm products.
- 135 farms (32%) sold more than \$100,000 in farm products.
- 12 farms sold \$76,000 of food directly to consumers. This is a 20% increase in the number of farms selling direct (10 in 2002), and a 73% increase in direct sales over 2002 sales of \$44,000.
- Direct sales were 0.2% of farm product sales, one half the national average of 0.4%.
- Toole County ranks 2nd in Montana for acreage of canola, with 2,033.
- The county ranks 4th in Montana for sales of hogs and pigs, with \$3.2 million.
- Toole County ranks fourth in the state for acreage of barley, with 52,000.
- The county ranks 5th in the state for inventory of hogs and pigs, with 16,000.

- Toole County ranks 6th in Montana for sales of poultry and eggs, with \$594,000.
- The county ranks sixth in Montana for inventory of broiler chickens, but *inventory figures were not released by the USDA in an effort to protect confidentiality.*
- Toole County ranks 7th in the state for inventory of laying hens, with 24,000.
- The county ranks 7th in the state for inventory of pullets for laying flock replacement, with 11,000.
- Toole County ranks eighth in Montana for acreage of wheat, with 241,000.

State of Montana highlights

Montana highlights from the Census of Agriculture (2007):

- 29,524 farms, 6% more than in 2002.
- Montana has 61 million acres of land in farms.
- Farmers sold \$2.8 billion of products in 2007.
- \$1.3 billion (46%) of these sales were crops.
- \$1.5 billion (54%) of these sales was livestock.
- The most prevalent farm size is 1,000 acres or more with 9,791 farms (33%) in this category.
- The next most prevalent is 10 to 49 acres with 5,462 (19%) farms.
- 7,379 farms (25%) are less than 50 acres.
- 15,695 farms (53%) sold less than \$10,000 in farm products.
- 6,380 farms (22%) sold more than \$100,000 in farm products.
- Montana ranks 2nd in the U.S. for acreage of barley, with 719,000.
- The state ranks 2nd in the country for acreage of dry edible peas, with 222,000.
- Montana ranks second in the U.S. for acreage of lentils, with 88,000.
- Montana ranks 3rd in the U.S. for acreage of wheat, with 5.1 million.
- The state ranks 5th in the country for acreage of forage, with 2.8 million.
- The state ranks seventh in the U.S. for inventory of sheep and lambs, with 272,000.
- 1,287 farms sold \$6.3 million of food directly to consumers. This is an 11% increase in the number of farms selling direct (1,164 in 2002), and a 40% increase in direct sales over 2002 sales of \$4.5 million.
- Direct sales were 0.2% of farm product sales, one half the national average of 0.4%.
- If direct food sales made up a single commodity, the value of these sales would outrank the state's 17th-most important product, safflower seeds.
- Statewide sales in vegetables totaled \$39 million.
- 229 farms farm organically, with a total of 58,868 acres of harvested cropland, and 75,807 acres of pastureland.
- 37,260 acres on 106 farms are undergoing organic conversion.
- 207 farms in Montana sold \$8.8 million of organic food products, including \$6.9 million of crops (this may include ornamental and greenhouse crops), \$847,000 of livestock and poultry, and \$1.1 million of products from livestock and poultry (such as milk or eggs).
- 148 farms market through community supported agriculture (CSA).
- 1,224 farms produce value-added products.
- 7,115 farms use conservation methods such as no-till, limited tilling, filtering field runoff to remove chemicals, fencing animals to prevent them from entering streams, etc.
- 7,707 farms practice rotational management of intensive grazing.
- 514 farms generate energy or electricity on the farms.

Montana's top 25 farm products in 2009 (Economic Research Service)

See chart on next page

	\$ millions
1 Wheat	949.9
2 Cattle and calves	896.1
3 Barley	189.8
4 Hay	116.4
5 Sugar beets	50.9
6 Lentils	42.9
7 Dairy products	42.8
8 Hogs	36.5
9 Potatoes	34.4
10 Greenhouse/nursery	30.2
11 Dry peas	27.1
12 Sheep and lambs	18.7
13 Corn	15.4
14 Honey	14.8
15 Chicken eggs	6.9
16 Dry beans	6.8
17 Safflower	5.3
18 Oats	3.5
19 Wool	2.4
20 Cherries	1.6
21 Flaxseed	1.3

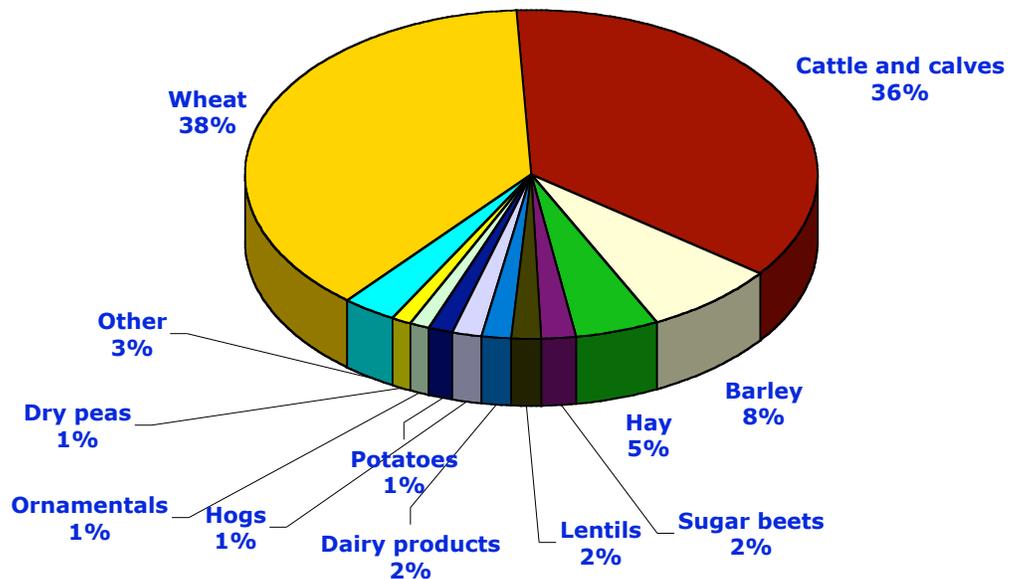
Note: aquaculture, turkeys, and mushrooms were also listed among Montana's top 25 products, in that order, but sales figures for these products were not released by ERS. Sales for these products combined appear to total about 3% of the state's farm product sales of \$2.6 billion in 2009.

Note also that at \$6 million, direct sales from farmers to consumers amount to more than the value of the 17th ranking product, safflower seeds.

Montana's top 25 farm products in 2009 (Economic Research Service)

See table on previous page

Top farm products sold by Montana farms, 2009



Source: USDA Economic Research Service

Balance of Cash Receipts and Production Costs (BEA):

Golden Triangle ranchers and farmers sell \$765 million of food commodities per year (a thirty-one-year average for 1979-2009), spending \$828 million to raise them, for an average loss of \$64 million each year. These figures do not include federal subsidies (see below). *Note that these sales figures compiled by the BEA may differ from cash receipts recorded by the USDA Census of Agriculture (above).*

Since 1979, farm producers have spent \$2 billion more producing crops and livestock than they earned by selling these products. This amounts to a loss of 8% of farm product sales. Total cash flow for farmers in the region has been negative for all but nine years since 1979. Moreover, 38% of the region's farms and ranches reported net losses in 2007 (Ag Census). Golden Triangle farmers and ranchers earned \$142 million less by selling commodities in 2009 than they earned in 1969 (in 2009 dollars).

Farmers and ranchers earn \$50 million per year of farm-related income — primarily custom work, and rental income (thirty-one-year average for 1979-2009). Federal farm support payments average \$175 million per year for all farms in the region combined (for the years 1979-2009). Overall, this means farm families rely heavily on off-farm jobs to make ends meet, and to obtain health care benefits.

The region's consumers:

Golden Triangle consumers spend \$362 million buying food each year, including \$210 million for home use. Most of this food (an estimated \$325 million) is produced outside the region. Only \$1.1 million of food products (0.2% of farm cash receipts, and 0.3% of the region's consumer market) are sold by farmers directly to consumers.

Estimated change in net assets for all region households combined was a loss of \$711 million in 2009 alone (BLS). This places further pressure on residents trying to pay for food.

Farm and food economy summary:

Farmers lose \$64 million each year producing food commodities, and spend \$350 million buying inputs from external suppliers, for a total loss of \$414 million to the region. Federal subsidies (see above) do not fully compensate for these losses, and moreover, only are given to farmers who grow select crops, such as wheat and barley.

Meanwhile, consumers spend an estimated \$325 million buying food from outside the region. Adding losses from the farm economy to these consumer dollars that flow away from the region, total loss to the region is \$740 million of potential wealth *each year*. This loss is nearly the same value as that of the commodities farmers sell in the region.

Consumer Markets for Food

Golden Triangle Region — markets for food eaten at home (2009):

Source: Bureau of Labor Statistics

Golden Triangle residents purchase \$362 million of food each year; \$210 million to eat at home. Home purchases break down in the following way:

	<i>millions</i>
Meats, poultry, fish, and eggs	\$ 46
Fruits & vegetables	39
Cereals and bakery products	27
Dairy products	23
“Other,” incl. sweets, fats, & oils	77

If Golden Triangle consumers purchased only 15% of the food they need for home use directly from farmers in the region, this would produce \$32 million of new farm income in the region.

Great Falls — markets for food eaten at home (2009):

Source: Bureau of Labor Statistics

Great Falls residents purchase \$218 million of food each year; \$127 million to eat at home. Home purchases break down in the following way:

	<i>millions</i>
Meats, poultry, fish, and eggs	\$ 28
Fruits & vegetables	23
Cereals and bakery products	16
Dairy products	14
“Other,” incl. sweets, fats, & oils	46

Havre — markets for food eaten at home (2009):

Source: Bureau of Labor Statistics

Havre residents purchase \$44 million of food each year; \$26 million to eat at home. Home purchases break down in the following way:

	<i>millions</i>
Meats, poultry, fish, and eggs	\$ 5.6
Fruits & vegetables	4.7
Cereals and bakery products	3.3
Dairy products	2.8
“Other,” incl. sweets, fats, & oils	9.3

Helena — markets for food eaten at home (2009):

Source: Bureau of Labor Statistics

Helena residents purchase \$195 million of food each year; \$114 million to eat at home. Home purchases break down in the following way:

	<i>millions</i>
Meats, poultry, fish, and eggs	\$ 25
Fruits & vegetables	21
Cereals and bakery products	15
Dairy products	12
“Other,” incl. sweets, fats, & oils	41

State of Montana — markets for food eaten at home (2009):

Source: Bureau of Labor Statistics

Montanans purchase \$2.6 billion of food per year, \$1.5 billion of this to eat at home. Home purchases break down in the following way:

	<i>millions</i>
Meats, poultry, fish, and eggs	\$ 328
Fruits & vegetables	278
Cereals and bakery products	194
Dairy products	162
“Other,” incl. sweets, fats, & oils	548

Key data sources:

Bureau of Economic Analysis data on farm production balance

<http://www.bea.doc.gov/bea/regional/reis/>

Food consumption estimates from Bureau of Labor Statistics Consumer Expenditure Survey

<http://www.bls.gov/cex/home.htm>

U.S. Census of Agriculture

<http://www.nass.usda.gov/census/>

USDA/Economic Research Service food consumption data:

<http://www.ers.usda.gov/data/foodconsumption/>

USDA/ Economic Research Service farm income data:

<http://ers.usda.gov/Data/FarmIncome/finfidmu.htm>

For more information:

To see results from *Finding Food in Farm Country* studies in other regions of the U.S.:

<http://www.crcworks.org/locales.html>

To read the original *Finding Food in Farm Country* study from Southeast Minnesota (written for the Experiment in Rural Cooperation): <http://www.crcworks.org/ff.pdf>

To view a PowerPoint presented in March, 2008, by Ken Meter at Rep. Collin Peterson's (D-MN) Minnesota agricultural forum, called the "Home Grown Economy":

<http://www.crcworks.org/crcppts/petersonkm08.pdf>

To get a brief list of essential food facts, many of which are cited in the presentation above,

<http://www.crcworks.org/foodmarkets.pdf>

To link to further analysis of farm and food economies in the U.S.:

<http://www.crcworks.org/econ.html>

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