



Sullivan County
NEW YORK

Agricultural and Farmland Protection Plan

APPENDICES

December 2014

Contents

- Appendix A: Resources, Programs, and Partners1
- Appendix B: Existing Plans.....17
- Appendix C: Agricultural Profile21
- Appendix D: Comparison of Mid-Hudson Counties40
- Appendix E: Agriculture & Property Taxes.....46
- Appendix F: Highlights of Surveys and Farmer Focus Group62
- Appendix G: Detailed SWOT Analysis67
- Appendix H: Farm Friendly Audits.....77
- Appendix I: Model Right-to-Farm Law82
- Appendix J: Model Farm-Friendly Regulatory Tools86
- Appendix K: Marketing Opportunities for Farmers94

Appendix A: Resources, Programs, and Partners

Resources – Summary Matrix

Financial and technical assistance programs and other resources for farmers are available through numerous local, state, and federal agencies and private organizations. These are summarized in the matrix below. Additional information can be found on the subsequent pages.

Agency/Organization	Services Offered To Farmers			
	Funding	Technical Assistance	Training & Education	Other *
Agricultural Marketing Resource Center				X
American Farmland Trust, New York Office				X
CADE, the Center for Agricultural Development and Entrepreneurship		X	X	
Catskill Mountainkeeper	X			X
Catskills CRAFT			X	
Cornell Cooperative Extension of Sullivan County		X	X	
Cornell Farm to School Program				X
Cornell Small Farms Program			X	X
Delaware Highlands Conservancy				X
Dirt Capital Partners	X			
Equity Trust	X			X
Farm Aid				X
Farm Credit East	X	X		
Farmer Veteran Coalition			X	
Farmers Market Federation of New York			X	X
Glynwood Center – Hudson Valley Farm Business Incubator			X	
Heroic Food Farm			X	
Hudson Valley Agribusiness Development Corporation		X		X
Hudson Valley Farm Hub			X	
National Farm to School Network				X
National Good Agricultural Practices Program				X
National Sustainable Agriculture Information Service		X		X
National Young Farmers Coalition				X
New England Small Farm Institute		X	X	
New York Ag Connection				X
New York Farm Bureau				X
New York Farm Viability Institute	X	X		
New York FarmLink		X		X
New York FarmNet		X		
NYS Department of Agriculture and Markets	X			
NYS Energy Research and Development Authority	X	X		
New York Sustainable Agriculture Working Group				X
Northeast Beginning Farmers Project			X	X
Northeast Center for Food Entrepreneurship		X	X	X

Agency/Organization	Services Offered To Farmers			
	Funding	Technical Assistance	Training & Education	Other *
Northeast Organic Farming Association			X	X
Northeast Sustainable Agriculture Research and Education	X			X
Ohio Direct Marketing Food & Agriculture				X
Rodale Institute Your Two Cents Fund	X			
Small Scale Food Processors Association of New York				X
Sullivan County Chamber of Commerce and Industry, Inc.			X	X
Sullivan County Division of Planning and Environmental Management	X	X		
Sullivan County Farm Bureau				X
Sullivan County Farm Network				X
Sullivan County Farmers' Market Association				X
Sullivan County Industrial Development Agency	X			
Sullivan County Partnership for Economic Development	X	X		
Sullivan County Soil & Water Conservation District	X	X		
Sullivan County Visitors Association				X
Sullivan Renaissance	X			
Sullivan-Wawarsing REAP Zone				X
USDA Agricultural Marketing Service				X
USDA Farm Service Agency	X			
USDA Natural Resources Conservation Service	X			
USDA Rural Development	X			
U.S. Farmstay Association				X
WWOOF (World Wide Opportunities on Organic Farms)				X
Watershed Agricultural Council	X	X		X

* Other includes information, advocacy, networking opportunities, etc.

Resources

Financial and technical assistance programs and other resources for farmers are available through numerous local, state, and federal agencies and private organizations. The following is a list of the most relevant resources and programs with web sites provided. Also included are links to agricultural support organizations and other web sites that offer information to beginning as well as experienced farmers. Marketing opportunities for farmers are listed separately in Appendix K.

Sullivan County and Mid-Hudson Region

- **Sullivan County Chamber of Commerce and Industry, Inc.**
<http://www.catskills.com/chamber-information>
- **Sullivan County Division of Planning and Environmental Management -**
<http://www.co.sullivan.ny.us/Departments/PlanningandEnvironmentalManagement/tabid/3225/default.aspx>
 - Agricultural funding resources and links -
<http://www.co.sullivan.ny.us/Departments/DepartmentsNZ/PlanningandEnvironmentalManagement/Agriculture/tabid/3257/Default.aspx>
 - *Revolving Loan Funds - Agri-Business Loan Program and Agri-Business Micro-Enterprise Loan Program:* Provides low-interest loans ranging from \$10,000 to \$100,000 to facilitate the establishment or expansion of agricultural business activity in Sullivan County.
- **Sullivan County Industrial Development Agency (SCIDA) -** <http://www.sullivanida.com>
 - *Agri-Business Revolving Loan Fund:* Provides loans to facilitate the establishment or expansion of agricultural business activity in Sullivan County.
- **Sullivan County Partnership for Economic Development –** <http://www.scpartnership.com>
 - *Sullivan Investments Revolving Loan Program:* Offers financing in the form of loans for projects that generate new jobs and expand the County's economic base.
- **Sullivan County Soil & Water Conservation District -** <http://sullivanswcd.org>
 - Coordinates the funding, regulatory permits, and site supervision for local environmental projects; an active participant in New York State Agricultural Environmental Management, a voluntary program for farmers to address water quality concerns on their operations through coordinated technical and financial assistance.
- **Cornell Cooperative Extension – Sullivan County -** <http://www.sullivance.org>
 - Outreach and education in agriculture and natural resource management; provides numerous educational programs for farmers and landowners.
 - Commercial community kitchen available for small scale food production. See <http://blogs.cornell.edu/ccesullivan/eat-kitchen-sullivan-county>.
- **Sullivan County Farm Bureau -**
http://www.nyfb.org/about_nyfb/new_york_county_farm_bureau_detail.cfm?ID=53
- **Sullivan County Farm Network -** <http://www.sullivancountyfarmnetwork.org>

- Mission is to increase farming activities in Sullivan County and to strengthen communication between those who grow food and those who consume it
- Organizes the annual agritourism initiative *Farmstock*
- **Delaware Highlands Conservancy** – <http://delawarehighlands.org>
 - An accredited land trust dedicated to conserving the natural heritage and quality of life in the Upper Delaware River region; offers information on conservation easements and other tools for land protection.
- **Sullivan Renaissance** – <http://www.sullivanrenaissance.org/grants>
 - Known for its community beautification grant program, but also offers a limited number of grants for projects that protect, enhance or conserve natural resources, such as recycling, stream restoration, tree planting, community vegetable gardens and innovative agricultural initiatives.
- **Hudson Valley Agribusiness Development Corporation** – <http://www.hvadc.org>
 - Expertise and resources for agriculture-related businesses in the Hudson Valley, from analysis and start-up assistance for new ventures to market expansion and improved distribution networks for existing agricultural businesses.
 - *Incubator Without Walls*: Comprehensive business assistance, value-added services, financing, and networking.
 - *Hudson Valley Bounty*: Initiative designed to promote local foods and support connections between local agricultural producers and culinary businesses.
- **Watershed Agricultural Council** - <http://www.nycwatershed.org>
 - Works with farm and forest landowners in the New York City Watershed region to protect water quality through land conservation, while supporting the economic viability of agriculture and forestry.
 - *Whole Farm Planning*: holistic approach to farm management used to identify and prioritize environmental issues on a farm without compromising the farm business.
 - *Farm to Market Program*: farm-business improvement grants, educational scholarships and other opportunities that provide farmers a chance to learn, enhance and bolster their production and marketing efforts.
 - *Farm to Market Conference*: trade show connecting farmers with NYC buyers.
 - *Pure Catskills*: a buy local branding campaign supporting the local food community and working landscapes in the Catskills region; participation is open to any farm-related business within any of the six counties that WAC represents (i.e., does not have to be located in the NYC watershed) - see <http://www.purecatskills.com>
- **Catskill Mountainkeeper** – <http://www.catskillmountainkeeper.org>
 - Grassroots advocacy organization dedicated to promoting sustainable growth and protecting the natural resources in the Catskill region.
 - Catskill Food Initiative: Includes the Catskill Edible Gardens Project, increased access to healthy local foods, and Catskill CRAFT (see below)
 - Agriculture Loan Fund for value-added production

- **Catskills CRAFT (Collaborative Regional Alliance For Farmer Training) -**
<http://www.catskillscraft.org>
 - Provides opportunities for beginning farmers to connect to and learn from existing farmers through farmer-to-farmer learning.
- **Catskills Farmlink -** <http://catskillsfarmlink.org>
 - Connects Catskills landowners with those interested in farming.
- **Hudson Valley Farm Hub -** <http://www.localeconomiesproject.org/initiatives/farm-hub>
 - Project being developed in Hurley, Ulster County by the Local Economies Project of the New World Foundation; will serve as a regional center for farmer training, agricultural research, and the demonstration of innovative farm technologies; slated to begin operations in spring 2015.
- **Glynwood Center – Hudson Valley Farm Business Incubator -** <http://www.glynwood.org/incubator>
 - Provides the tools and resources aspiring agricultural entrepreneurs need to develop and manage viable farm enterprises; offers access to land, housing, shared equipment and infrastructure, farm and business mentoring, technical classes, peer learning opportunities, and working capital.
- **Heroic Food Farm -** <http://heroicfood.org>
 - Hands-on training program to prepare military veterans for careers in sustainable farming, agricultural trades, and food entrepreneurship in a veteran-supportive environment.

New York State

- **NYS Department of Agriculture and Markets -** <http://www.agriculture.ny.gov>
 - Division of Agricultural Development aims to strengthen the viability and consumer awareness of New York’s food and agricultural industry; includes activities and services in market development, business development and support.
 - *Specialty Crop Block Grant Program:* Funding to enhance the competitiveness of specialty crops, defined as “fruits, vegetables, tree nuts, dried fruits, horticulture, and nursery crops (including floriculture).”
 - *Organic Farming Development/Assistance:* Guidance in locating resources on organic agriculture and organically produced foods.
 - Additional funding opportunities announced periodically.
- **Pride of New York Program -** <http://www.prideofny.com/PONY/consumer/viewHome.do>
 - NYSDAM website with information on over 3,000 "Pride Of New York" members and their products.
- **New York State Energy Research and Development Authority (NYSERDA) –**
<http://www.nyserda.org>
 - Offers objective information and analysis, innovative programs, technical expertise, and funding to help New Yorkers increase energy efficiency, save money, use renewable energy, and reduce reliance on fossil fuels.

- Programs and funding opportunities for the agricultural sector - <http://www.nyserda.ny.gov/Energy-Efficiency-and-Renewable-Programs/Commercial-and-Industrial/Sectors/Agriculture.aspx>

Federal Government

- **USDA Agricultural Marketing Service** – <http://www.ams.usda.gov>
 - Administers programs that facilitate the efficient, fair marketing of U.S. agricultural products, including food, fiber, and specialty crops; provides the agricultural sector with tools and services that help create marketing opportunities.
- **USDA Farm Service Agency** - <http://www.fsa.usda.gov/FSA>
 - *Farm Loan Programs*: Direct loans and loan guarantees to help family farmers start, purchase, or expand their farming operation; includes Farm Ownership Loans, Farm Operating Loans and Microloans, Emergency Farm Loans, Land Contract Guarantees, Loans for Beginning Farmers, etc.
 - *Biomass Crop Assistance Program*: Financial assistance to owners and operators of agricultural and non-industrial private forest land who wish to establish, produce, and deliver biomass feedstocks.
- **USDA Natural Resources Conservation Service** - <http://www.nrcs.usda.gov>
 - *Agricultural Management Assistance*: helps agricultural producers use conservation to manage risk and solve natural resource issues through natural resources conservation.
 - *Conservation Stewardship Program*: helps agricultural producers maintain and improve their existing conservation systems and adopt additional conservation activities to address priority resources concerns.
 - *Environmental Quality Incentives Program*: provides financial and technical assistance to agricultural producers to address natural resource concerns and deliver environmental benefits such as improved water and air quality, conserved ground and surface water, reduced soil erosion and sedimentation or improved or created wildlife habitat.
 - *Agricultural Conservation Easement Program*: provides financial and technical assistance to help conserve agricultural lands and wetlands and their related benefits. (*Note: This is a new program under the 2014 Farm Bill that consolidates three former programs – the Wetlands Reserve Program, Grassland Reserve Program and Farm and Ranch Land Protection Program.*)
- **USDA New Farmers Website** - <http://www.usda.gov/wps/portal/usda/newfarmers?navid=getting-started>
- **USDA Rural Development, New York Office** – <http://www.rurdev.usda.gov/NYHome.html>
 - *Value-Added Producer Grants*: provides agricultural producers with matching funds for value-added ventures that will increase the return on their agricultural commodities; can be used for planning (e.g., feasibility studies, business plans) and/or working capital.

- *Rural Energy for America (REAP)*: grants and guaranteed loans to help agricultural producers purchase and install renewable energy systems and make energy efficiency improvements.
- *Farm Labor Housing Program*: Direct loans and grants for new construction or substantial rehabilitation of safe, affordable rental housing for farm workers.

Virtual Food Hubs

- **New York Marketmaker** - <http://ny.foodmarketmaker.com> – an interactive platform that seeks to foster business relationships between producers and consumers of food industry products and services.
- **Pure Catskills Marketplace** – coming soon (see http://www.nycwatershed.org/ag_pure-catskills-marketplace.html); will provide Pure Catskills farm, food and forest business members an e-commerce portal through which members can market products to millions of online shoppers (note: membership is open to farmers in any of the six counties that the Watershed Agricultural Council represents, whether or not the farm itself is in the NYC watershed).
- **Local Dirt** - <http://localdirt.com> – a national website connecting local sellers (farms, farmers markets, cooperatives) with buyers (individuals, businesses, distributors).
- **FarmersWeb** - <http://www.farmersweb.com> - an online marketplace connecting buyers with local farms and producers.
- **List Your Harvest** - <http://www.listyourharvest.com> - an online marketplace where you can post or browse locally grown or made products currently available in your area; new (spring 2014).

Other Resources for Farmers

- **Agricultural Marketing Resource Center** – <http://www.agmrc.org>
 - Addresses marketing and business planning for U.S. agricultural producers.
- **American Farmland Trust, New York Office** - <http://newyork.farmland.org>
- **CADE, The Center for Agricultural Development and Entrepreneurship** - <http://www.cadefarms.org>
- **Cornell Farm to School Program** – <http://farmtoschool.cce.cornell.edu>
- **Cornell Small Farms Program** - <http://smallfarms.cornell.edu>
- **Dirt Capital Partners** – www.dirtpartners.com
 - Invests in farmland in partnership with sustainable farmers throughout the northeastern U.S., promoting land access and security for farmers while keeping farmland in productive use. Most of their land investment partnerships result from a farmer contacting Dirt Capital with one of the following scenarios: 1) Farm operation has been leasing land, has a successful operation, and wants to purchase their leased parcel or relocate to a larger and/or more secure farm; 2) Successful farm operation is looking to expand by acquiring adjacent or nearby land; or 3) Retiring farmer wants to keep his or her farm in active

production, and would like to transition the farm to family members or other successor farmers.

- **Equity Trust** - www.equitytrust.org
 - A small, national non-profit organization committed to helping communities gain ownership interests in land and other local resources; works to make economic changes that balance the needs of individuals with the needs of the community.
 - Program areas include: 1) Farms for Farmers - promotes alternative ownership structures for farms, to benefit farmers who need affordable farmland and communities that want a secure source of locally grown food and a way to preserve their environmental heritage; 2) Equity Trust Fund - a revolving loan fund enabling socially conscious lenders and donors to support projects that are creating new ways of owning, using, and stewarding property; and 3) Our Property and Values Program - promotes exploration, understanding, and implementation of socially equitable forms of property ownership and economics based on principles of social justice, equity, and environmental sustainability.
- **Farm Aid Resource Network** - <http://ideas.farmaid.org>
 - Connects farmers to services, tools, opportunities, and resources.
- **Farm Credit East** – <http://www.farmcrediteast.com>
 - “The # 1 financial services cooperative for the agricultural industry” in the northeastern U.S.
- **Farmer Resource Network** - http://www.farmaid.org/site/c.qll5lhNVJsE/b.4375765/k.71EA/Farmer_Resource_Network.htm
- **Farmers Market Federation of New York** - <http://www.nyfarmersmarket.com>
- **Farmer Veteran Coalition** - <http://www.farmvetco.org>
- **Ground Operations: Battlefields to Farmfields** - <http://www.groundoperations.net>
- **National Farm to School Network** - <http://www.farmtoschool.org>
- **National Good Agricultural Practices Program (through Cornell)** - <http://www.gaps.cornell.edu>
- **National Sustainable Agriculture Information Service** - <http://attra.ncat.org/index.php>
 - Sustainable Farming Internships - <http://attra.ncat.org/attra-pub/internships>
- **National Young Farmers Coalition** - <http://www.youngfarmers.org>
- **New England Small Farm Institute** - <http://www.smallfarm.org>
 - Promotes small farm development by providing information and training for aspiring, beginning and transitioning farmers.
- **New York Ag Connection** - <http://www.newyorkagconnection.com>
- **New York Farm Bureau** – <http://www.nyfb.org>
- **New York Farmlink** - <http://www.newyorkfarmlink.org>
- **New York Farmnet** - <http://www.nyfarmnet.org>
- **New York Farm Viability Institute** – <http://www.nyfvi.org>
- **New York Sustainable Agriculture Working Group** - <http://www.ny-sawg.org>
- **Northeast Beginning Farmers Project (through Cornell)** - <http://nebeginningfarmers.org>
- **Northeast Center for Food Entrepreneurship (through Cornell)** – <http://necfe.foodscience.cals.cornell.edu>

- **Northeast Organic Farming Association** - <http://www.nofa.org/index.php>
 - Beginning Farmer, Apprentice, and Mentorship Programs - <http://www.nofany.org/bfam>
- **Northeast Sustainable Agriculture Research and Education** – <http://www.nesare.org>
 - Offers grants for funding relevant agricultural research projects.
- **Ohio Direct Marketing Food & Agriculture** - <http://u.osu.edu/fox.264>
 - From Ohio State University, a blog with marketing news and trends and other resources for agricultural producers and marketers.
- **Rodale Institute Your Two Cents Fund** – <http://rodaleinstitute.org/assets/TwoCentsRFP-20Acres+.pdf>
 - Offers grants of up to \$5,000 to farmers who are transitioning to certified organic production or have recently obtained organic certification.
- **Shop Local Save Land Initiative** – <http://www.delawarehighlands.org/shoplocalsaveland>
Shop Local Save Land connects consumers to local farm and forest products and educational information in order to support working lands and protect our healthy lands and clean waters, scenic rural character, cultural heritage, and quality of life. Supporting our working lands supports a sustainable local economy
- **Small Scale Food Processors Association of New York** – <http://www.nyssfpa.com>
- **U.S. Farmstay Association – Starting a Farmstay** - <http://www.farmstayus.com/for-farms/starting-a-farm-stay>
- **WWOOF (World Wide Opportunities on Organic Farms)** - <http://www.woof.net>
 - Website linking volunteers/interns with organic farms and growers.

Partners and Programs

Numerous public agencies, private organizations, and partnerships support agriculture in Sullivan County by providing direct technical and financial assistance to farmers, protecting farmland, marketing agricultural products, and implementing specific projects and initiatives. These are listed alphabetically and described below.

Catskill Mountainkeeper

<http://www.catskillmountainkeeper.org>

The mission of Catskill Mountainkeeper (CMK) is “to be the strongest and most effective possible advocate for the Catskill region.” The group promotes sustainable growth and the protection the natural resources essential to healthy communities. CMK’s Catskill Food Initiative is a multi-faceted strategy to stimulate agricultural production, focusing primarily on supporting consumers and farmers; eventually, CMK plans to expand its programs to support retailers and improve agricultural infrastructure.

CMK’s Catskill Edible Garden Project works with area schools to build vegetable gardens, integrate garden based education programs into school curriculums, and offer summer employment to high school students. A collaboration between CMK, the Center for Workforce Development, Cornell Cooperative Extension, Green Village Initiative and Sullivan Renaissance, the Edible Garden Project gives students and the community an opportunity to grow and eat healthy local food, while offering an agricultural career path.

Cornell Cooperative Extension of Sullivan County

<http://www.sullivanccce.org>

Part of a statewide network, Cornell Cooperative Extension of Sullivan County offers programs in agriculture, natural resources, horticulture, family and consumer sciences, financial education, nutrition, caregiving, parenting and 4-H youth development. Extension efforts in agriculture and natural resource management focus on providing outreach, education, and research-supported technical assistance to farmers and landowners.

A commercial kitchen facility was recently developed at the Extension’s Gerald J. Skoda Educational Center to support small-scale food production in the County. The Entrepreneurial & Teaching (EaT) Kitchen is a training ground for food entrepreneurs, a learning center for cooks, and a demonstration site for chefs, and the starting point for healthy eating. In association with the Liberty Community Development Corporation and Sullivan Renaissance, Cornell Cooperative Extension held a hands-on workshop series entitled “Recipes for Success” in spring 2014. Aimed at aspiring food entrepreneurs, the series focused on the business planning process, helping participants convert their ideas into viable business opportunities.

In partnership with Sullivan BOCES and Sullivan Renaissance, Cornell Cooperative Extension is planning to construct a year-round greenhouse and high tunnel. The facility would be used for a series of classes, mainly focused on commercial growers extending their seasons.

Cornell Cooperative Extension coordinates numerous events and activities to raise public awareness of agriculture in Sullivan County. These include *Down on the Farm Day*, an annual family event that offers a variety of activities, demonstrations, and exhibits; *Agricultural Awareness Day*, a trade show produced in partnership with Sullivan County BOCES; *Ag-Stravaganza*, a showcase for the Extension's 4-H youth programs; and the Grahamsville *Little World's Fair*.

Delaware Highlands Conservancy

<http://delawarehighlands.org>

The Delaware Highlands Conservancy is an accredited land trust dedicated to conserving the natural heritage and quality of life in the Upper Delaware River region. From two offices – one in Hawley, PA and one in Monticello – the Conservancy focuses its efforts on land protection; education and events, to foster a sense of connection to the lands and waters among residents and visitors; and partnerships with organizations, like Catskill Mountainkeeper, on projects that contribute to natural resource protection. The Conservancy has worked with many private landowners in Sullivan County to protect their lands using conservation easements and other tools.

Hudson Valley Agribusiness Development Corporation

<http://www.hvadc.org>

The Hudson Valley Agribusiness Development Corporation (HVADC) is a not-for-profit organization established to develop, promote, enhance, and maintain agriculture in the region. It serves as an economic development agency for farms and agribusinesses in Columbia, Dutchess, Orange, Sullivan, Rensselaer, Ulster and Washington Counties, all of which have committed financial resources to support HVADC's operations.

HVADC aims to enhance the bottom line of farm businesses and strengthen the agricultural industry as a whole. It offers technical assistance, business development services and the coordination of financial and other resources to agriculture-related businesses. Unlike other economic development organizations, programming is focused on a narrow set of industries: production agriculture, value-added food processing, agricultural marketing and distribution, agriculture-related alternative energy production, agritourism and culinary tourism, and agricultural biotechnology.

HVADC's Incubator Without Walls program allows qualified agricultural businesses to tap into a wide array of services, including comprehensive business assistance, value-added services, financing, and networking, to accelerate their growth. Hudson Valley Bounty is an HVADC initiative designed to

promote local foods and support connections between local agricultural producers and culinary businesses. HVADC has also been directly involved in efforts to create a food distribution hub in Sullivan County, along with the Sullivan County IDA.

Sullivan County Agricultural and Farmland Protection Board (AFPB)

Article 25-AAA of the New York State Agricultural Protection Act, passed into law in 1992, authorized the creation of county agricultural and farmland protection boards. These boards are authorized to advise their county legislature about Agricultural Districts, review notice of intent filings, make recommendations about proposed actions involving government acquisition of farmland in agricultural districts, request a review of state agency regulations that affect farm operations within an agricultural district, and review and endorse applications for Purchase of Development Rights funding. The Sullivan County Agricultural and Farmland Protection Board has 7 members representing the farming community, with staff from the Sullivan County Office of Real Property Services, County Division of Planning, and Cornell Cooperative Extension and a member of the County Legislature serving as *ex-officio* members. The Division of Planning also provides staff support.

Sullivan County Agriculture Advisory Board

The Sullivan County Agriculture Advisory Board was formed in 2012. Its mission is to “ensure that there is accurate information in Sullivan County about agriculture, associated businesses and infrastructure (processing, distribution and marketing) to allow for effective policies and programs.” The board works with county, state and federal legislators on policy issues while identifying high priority projects such as the meat processing plant, the dairy processing facility, farm viability, grants, funding, training, outreach and the creation of a local food hub.

Sullivan County Chamber of Commerce and Industry, Inc.

<http://www.catskills.com>

Established in 1974, the Sullivan County Chamber of Commerce & Industry, Inc. works to assist, support, promote and advocate on behalf of its members. Among other benefits, members can participate in Chamber seminars and workshops, receive free individualized business counseling and assistance through SCORE and the Small Business Development Center, and learn about funding opportunities available from County and state agencies.

Sullivan County Department of Public Health

<http://co.sullivan.ny.us/?TabId=3293>

The Sullivan County Department of Public Health, also known as Sullivan County Public Health Services, works to prevent illness and disease, and to protect and promote public health. The Department has been involved in efforts to encourage large consumers, such as school districts, prisons, and other institutions, to purchase local farm products.

Sullivan County Division of Planning And Environmental Management

<http://www.co.sullivan.ny.us/Departments/PlanningandEnvironmentalManagement/tabid/3225/default.aspx>

The County Division of Planning and Environmental Management (DPEM) supports the local agricultural industry through the implementation of the Agricultural and Farmland Protection Plan and helps agricultural producers diversify and expand. It also provides staff support to the Agricultural and Farmland Protection Board. An Agricultural and Natural Resources Program Leader position is shared between the DPEM and Cornell Cooperative Extension of Sullivan County.

The DPEM administers two revolving loan funds for agriculture: the Agri-Business Loan Program and the Agri-Business Micro-Enterprise Loan Program. These programs provide low-interest loans ranging from \$10,000 to \$100,000 to facilitate the establishment or expansion of agricultural business activity in Sullivan County. Between November 2003 and October 2012, the two agri-business loan programs made 25 loans totaling approximately \$1.35 million.

Sullivan County Farm Bureau

http://www.nyfb.org/about_nyfb/new_york_county_farm_bureau_detail.cfm?ID=53

The Sullivan County Farm Bureau is the local affiliate of the New York Farm Bureau, a membership-supported organization that serves as an advocate for the agricultural industry. According to its website, the Farm Bureau “has a strong record of positive legislative accomplishments for family farms, resulting in laws that are designed to make it easier to keep farmers on their land, producing local food for local people.” The New York Farm Bureau has nearly 30,000 members.

Sullivan County Farm Network

<http://www.sullivancountyfarmnetwork.org>

Founded in 2010, the Sullivan County Farm Network works with farmers and non-farmers who want to expand agriculture and the availability of local food in Sullivan County. Its mission is to increase farming activities in Sullivan County and to strengthen communication between those who grow food and those who consume it. The group’s activities include organizing and managing *Farmstock*, a series of “open

farm” days hosted by local farms to encourage residents to get to know the farmers and learn more about the local food production system.

Sullivan County Farmers’ Market Association

<http://sullivancountyfarmersmarkets.org>

The Sullivan County Farmers’ Market Association coordinates seasonal farmers markets held in Callicoon and Liberty, as well as an indoor farmers market held in Callicoon from November through April (*note: additional farmers’ markets in the County are organized by other entities*). It also hosts an annual “Our Farm to Your Fork” farm-to-table dinner and other events featuring local farm products.

County of Sullivan Industrial Development Agency

<http://www.sullivanida.com>

The primary goal of the Sullivan County Industrial Development Agency (SCIDA) is to promote economic welfare, recreation opportunities, prevent unemployment and economic deterioration, ensure the prosperity of Sullivan County’s inhabitants, and promote tourism and trade. The SCIDA administers a USDA-funded Agri-Business Revolving Loan Fund that offers loans to facilitate the establishment or expansion of agricultural business activity in Sullivan County.

Created as a public benefit corporation to grant tax abatements and advance economic development projects, the SCIDA has become increasingly involved in agricultural development, taking on a leadership role with respect to the development and construction of the red meat processing facility and a food hub.

Sullivan County Partnership for Economic Development

<http://www.scpartnership.com>

The Sullivan County Partnership for Economic Development is a private, not-for-profit economic development agency that serves as the one-stop resource for business development in the County. Its team of economic development professionals works with commercial real estate brokers, developers, site selection firms, and New York State to find the advantageous and cost-effective locations for corporate attraction and expansion of industry. It also supports small business development and expansion by providing technical and financial assistance, partnering with the County and the Sullivan County Industrial Development Agency where appropriate. Through its Sullivan Investments Revolving Loan Program, the Partnership offers loans of \$40,000 to \$160,000 for projects that generate new jobs and expand the County’s economic base; at least one full-time job must be created or retained for each \$20,000 in loan funds borrowed.

Sullivan County Soil and Water Conservation District

<http://sullivanswcd.org>

The Sullivan County Soil and Water Conservation District (SWCD) is a resource management agency that coordinates and implements its programs at the local level in cooperation with federal and state agencies; it coordinates the funding, regulatory permits, and site supervision for local environmental projects. The SWCD is an active participant in New York State Agricultural Environmental Management, a voluntary program for farmers to address water quality issues through coordinated technical and financial assistance.

Sullivan County Visitors Association

<http://www.scva.net>

The Sullivan County Visitors Association (SCVA), the County's designated tourism promotion agency, actively promotes agriculture as part of its overall marketing program. As stated in the introduction to Sullivan County's 2014 Travel Guide: "Farm-fresh foods, spirits, beer, wine, maple sugar, and cheese are all around at farms, markets, and in our restaurants." Available online as well as in print, the travel guide lists working farms, farmers markets, breweries, distilleries, farm tours, and other agriculture-related attractions. The SCVA also publishes a "Made in the Sullivan County Catskills" brochure featuring products that are locally-grown or produced, with an associated website.

Through its InfoOasis program, the SCVA has tourism "ambassadors" countywide, offering visitors easy access to information on and referrals to Sullivan County attractions and events. The SCVA publishes weekly "e-blasts," attends numerous trade shows, and sends bloggers and travel writers to locations around the County. All of these activities help to promote agritourism in Sullivan County.

Sullivan Renaissance

<http://www.sullivanrenaissance.org/grants>

Sullivan Renaissance is a beautification and community development program principally funded by the Gerry Foundation. Its mission is to enhance the appearance of Sullivan County while building a sense of pride and spirit in the community. Although it is known mainly for its community beautification grant program, Sullivan Renaissance offers a limited number of grants for projects that protect, enhance or conserve natural resources, such as recycling, stream restoration, tree planting, community vegetable gardens and innovative agricultural initiatives. It also offers a mini grant, which can be utilized by businesses for landscaping and signage. Sullivan Renaissance collaborates with many other organizations, including the Sullivan County Division of Planning and Environmental Management, Catskill Mountainkeeper, and the SUNY Sullivan Foundation.

Sullivan-Wawarsing REAP Zone

The Rural Economic Area Partnership is a pilot technical assistance program established by the USDA to mitigate the negative effects of a lack of employment opportunities and job losses. Sullivan County and the Town of Wawarsing were selected as one of the locations to put in place a pilot program to search for ways to revitalize rural areas under the REAP program. The strategic plan for the Sullivan-Wawarsing REAP Zone includes the creation and funding of an agricultural economic development office and support for many of the initiatives outlined in the agricultural and farmland protection plan.

Watershed Agricultural Council/Pure Catskills

<http://www.nycwatershed.org> and <http://www.purecatskills.com>

The Watershed Agricultural Council (WAC) works with farm and forest landowners in the New York City Watershed region to protect water quality through land conservation, while supporting the economic viability of agriculture and forestry. Based in Walton, Delaware County, WAC is a non-profit organization supported by the NYC Department of Environmental Protection, the U.S. Department of Agriculture, and other federal, foundation, and private sources.

WAC uses Whole Farm Planning, a holistic approach to farm management to identify and prioritize environmental issues on farms without comprising the farm business. Through its Farm to Market Program, WAC offers farm-business improvement grants, educational scholarships and other opportunities that provide farmers a chance to learn, enhance and bolster their production and marketing efforts. WAC also hosts an annual Farm to Market Conference, a trade show that connects farmers with NYC buyers.

Pure Catskills is a buy local branding campaign, sponsored by WAC, to mobilize community support for fresh foods grown, raised, and manufactured in the Catskills. Membership in Pure Catskills is open to any farm-related business within any of the six counties that WAC represents; the farm itself does not have to be located in the New York City watershed. WAC produces the Pure Catskills Guide both in print and online, maintains a Pure Catskills website with a searchable directory, and distributes Pure Catskills newsletter and e-bursts to promote farmers, food businesses, retailers, and entrepreneurs throughout the watershed.

Appendix B: Existing Plans

Several existing plans provided the context for this updated County Agricultural and Farmland Protection Plan. A few of these are summarized below.

Sullivan County Agricultural and Farmland Protection Plan

Sullivan County's first Agricultural and Farmland Protection Plan was adopted by the County Legislature in 1999. The plan included an introduction explaining why agriculture is important; an overview of Sullivan County agriculture with an analysis of its strengths, weaknesses, opportunities, and threats; goals and objectives; recommendations for agricultural development and farmland protection; and a plan implementation schedule. Notably, the plan recommended creation of an Agricultural Economic Development Specialist position to assist the County with implementation; a job description for the proposed position was provided in an appendix.

Eight goals were established for Sullivan County's agricultural and farmland protection plan:

- Maintain the County's valuable farmland in active agricultural use.
- Preserve a critical mass of both farmers and agri-businesses to support competition and provide a foundation for a strong agricultural economy.
- Increase the economic returns associated with farming and maintaining Sullivan County's working landscape.
- Diversify and broaden the agricultural economic base to provide new income opportunities.
- Increase public recognition of the value of agriculture and farmland and develop a better understanding of farm issues by non-farmers.
- Attract new entrepreneurs and younger households to farming ventures and extend the availability of capital to finance such enterprises.
- Protect farmers from development and regulatory intrusions which threaten their ability to operate in a normal competitive fashion as agricultural enterprises.
- Integrate agricultural development into town and County economic development strategies and land use plans so as to take advantage of the farm opportunities which will inevitably result from growth of the community as a whole.

The recommendations in the 1999 plan address such issues as right-to-farm laws, farmland preservation, land use planning, education and public relations, taxation, economic development, and business, estate, and farm planning. Since the plan was completed, many priority initiatives have been met and additional areas of focus have emerged.

Municipal Agricultural and Farmland Protection Plans

Municipal farmland protection plans were developed for the Towns of Bethel, Callicoon, Delaware, and Liberty in 2008. Each plan offered a toolbox of ideas and actions that could be implemented over time to improve agricultural opportunities, preserve important farmlands, and maintain open space. The plans also documented the current status of farming and issues facing farmers and the role played by agriculture in each town; identified farmland prioritization criteria; and established a long-range vision, goals, and strategies for agriculture.

Sullivan County Open Space Plan (Conserving Open Space and Managing Growth)

The Sullivan County Open Space and Conservation and Growth Plan was developed by the Sullivan County Division of Planning and Environmental Management in 2008. Building on the County's Agricultural and Farmland Protection Plan and the New York State Open Space Conservation Plan, the document was designed to serve as a road map for the County to protect and restore its existing natural resources. It was also intended as a resource for municipal governments to incorporate open space protection into land use decisions, local laws and planning documents.

With respect to agriculture, the plan described priority areas for land conservation, including Agricultural Districts, and identified obstacles and opportunities facing agricultural resources. Four goals were presented for agriculture:

- Protect and maintain existing farms.
- Continue development of emerging agri-businesses and ag-diversification.
- Maintain history and preserve rural quality of Sullivan County.
- Promote and market current and future farms.

The plan proposed five strategies to address the goals:

- Create a branding and marketing campaign to promote Sullivan County agricultural products and agritourism.
- Improve access to funding and encourage programs that protect farmland.
- Identify new markets for local agricultural products.
- Educate the public about the personal and societal benefits of supporting local agriculture.
- Improve farm profitability and product diversification.

Some of the actions associated with these strategies are in the process of being implemented, while others have been fine-tuned in the process of the current Agricultural and Farmland Protection Plan update.

Sullivan County Agricultural Summit

In November 2011, a Sullivan County Agricultural Summit brought together about 200 farmers, agri-business leaders, and agency and organization representatives at the Villa Rome Resort and Conference Center in Callicoon. The Agricultural Summit was a collaborative effort between Sullivan County, Cornell Cooperative Extension, Pure Catskills, the Sullivan County Farm Network, Catskill Mountainkeeper, and other organizations, as well as several farms and businesses.

The primary objectives of the Agricultural Summit were to identify the biggest challenges facing Sullivan County agriculture and come up with solutions for overcoming those challenges. Priority solutions included creating a “one-stop shop” for assistance with business planning, funding and financing, and other available resources; fostering collaboration among farmers to prioritize initiatives and leverage political and economic power; focusing on sustainable energy practices; and advocating for agriculture within the political system.

Sullivan County Comprehensive Economic Development Strategic Plan (ScCEDs)

The Sullivan County Comprehensive Economic Development Strategic Plan (ScCEDs) was developed in 2014. Its primary goal was to consolidate and coordinate a number of ongoing economic development initiatives, providing a comprehensive strategy to guide future policy actions and resource allocations in the County.

The plan identified agriculture, along with tourism and health care, as the primary drivers of the Sullivan County economy, defining agriculture broadly to encompass “the production of farm food products and product processing through manufacturing.” In particular, the plan highlighted agriculture’s connections to other industries (tourism, the arts, health care), the demand for “locally produced, health and nutritious foods,” and the growth of specialty agribusinesses and niche farms as reasons to focus on agriculture’s “solid prospects” for economic development.

Nine broad initiatives were developed as “guiding points” of the ScCEDs plan. Initiative #6 called for the County to “sustain key agricultural industries and continue efforts to develop new ones.” Specific strategies to be taken were:

- Develop a program to build dairy processing capacity throughout the County as needed.
- Ensure the Liberty Red Meat Processing facility is completed and is developed in a way farmers will use it and it will sustain other businesses.
- Further the efforts of the development of a food hub and foster regional partnerships for success.

- Task the Agriculture & Farmland Protection Plan update with exploring other opportunities for expanding agriculture in the County, including but not limited to hops development, wine/cider/distillery production, berries, hoop houses, renewable energy, etc.

Mid-Hudson REDC Strategic Plan

The Strategic Plan for the Mid-Hudson Regional Economic Development Council (REDC), initially developed in 2011, presents four “core strategies” to create jobs in targeted industry sectors:

- INVEST in technology.
- ATTRACT and RETAIN mature industries – Undertake initiatives to retain and stimulate mature industries (distribution, financial and professional services, and corporate food and beverage) as sectors of the regional economy that represent large, vital anchor employers.
- GROW natural-resource related sectors – Continue to leverage the region’s outstanding natural resources, including its unique location between the Hudson River, Delaware River, and Long Island Sound, to sustain and promote development and industries that preserve the region’s excellent quality of life. “Natural resource-related sectors” include natural resources and the environment; waterfront development; tourism, arts and culture; agriculture; and artisanal food and beverage.
- REVITALIZE regional infrastructure.

Regarding agriculture, the regional economic development plan states:

Farming adds to the region’s quality of life through preservation of an agricultural landscape that is a hallmark of the Mid-Hudson Valley. It provides fresh local foods to the restaurants, farmers markets, and fruit and vegetable stands of the region and to restaurants and greenmarkets in New York City... [The agricultural sector] has shown its recent importance by providing a solid platform for economic growth and job creation over the last five years... The sector is driven by small, entrepreneurial firms, and with the ‘locavore’ and organic trends in the food industry and the emergence in the region of new, entrepreneurial firms such as Farm to Table Co-packers in Kingston, there is opportunity to support continued growth... [Page 15]

Under the “GROW natural-resource related sectors,” the plan calls for supporting agriculture by “creating regional food aggregation and distribution hubs and by increasing state funding for farmland preservation to leverage federal and private dollars.” Food hubs have been identified by the Council as one way to capitalize on regional agriculture and promote interregional cooperation. Subsequently, funding for a food hub in Sullivan County was awarded in the 2014 CFA funding round.

Appendix C: Agricultural Profile

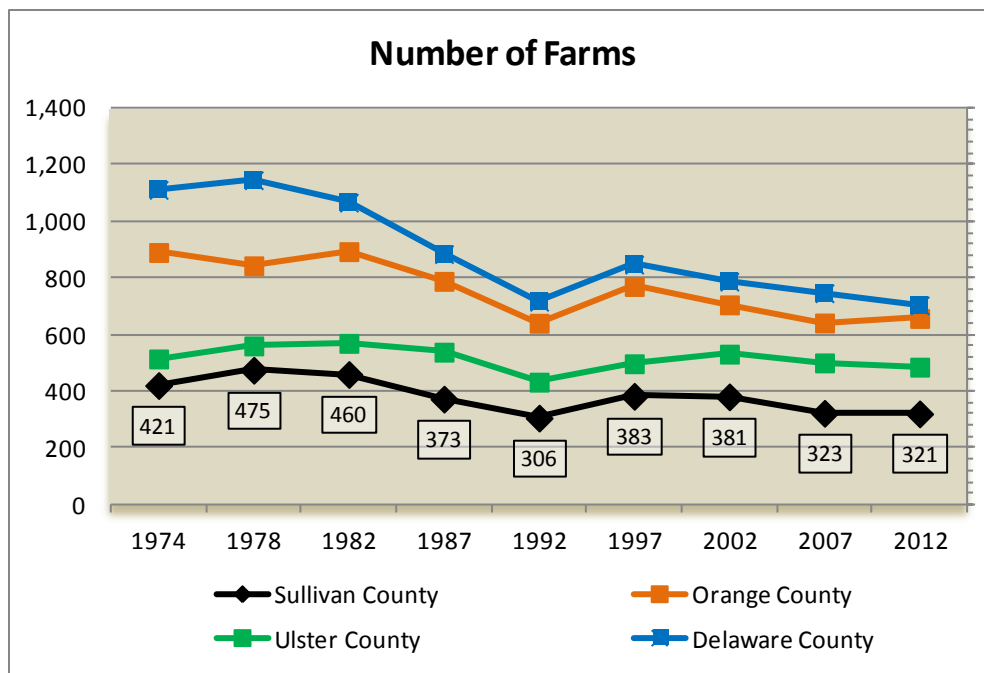
This profile provides information on Sullivan County farms, farmland, and agricultural economic characteristics based on the Census of Agriculture. Conducted every five years by the U.S. Department of Agriculture, the Census of Agriculture is a rich source of information on the characteristics of farms and farmers and agricultural trends at the county, state, and federal levels.

Farms and Farmers in Sullivan County

Number of Farms

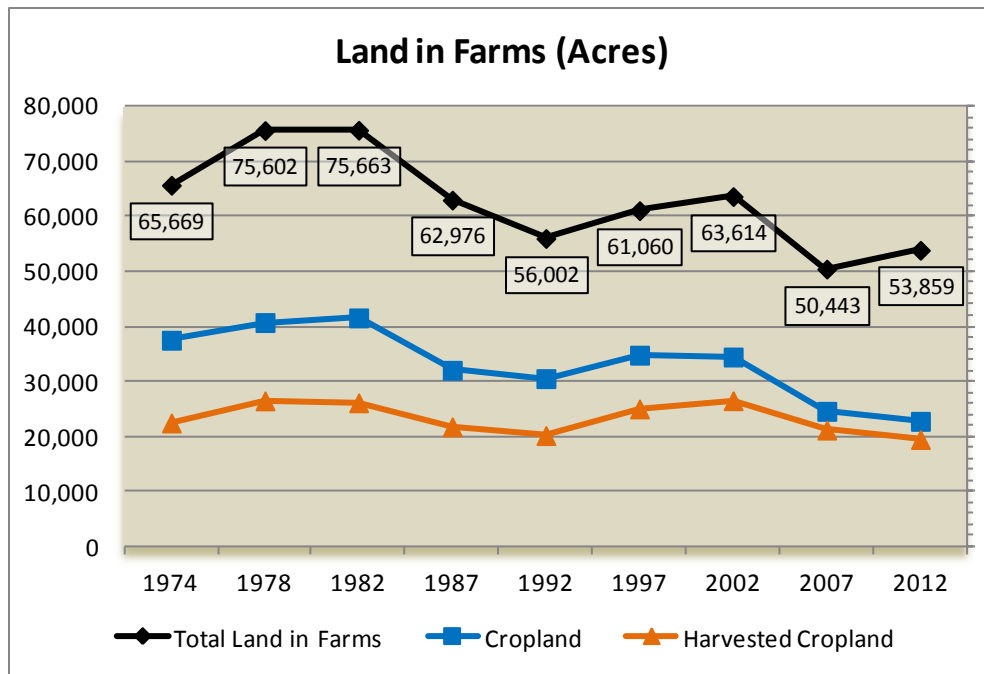
The 2012 Census of Agriculture reported 321 farms in Sullivan County. For purposes of the Census, the USDA defines a farm as an entity with sales (or potential sales) of \$1,000 or more in agricultural products in the census year.

As illustrated in the chart below, Sullivan County lost nearly 24% of its farms between 1974 and 2012. Similar declines occurred in neighboring counties including Orange (-26.2%) and Delaware (-36.7%). However, in the last five-year period, 2007 to 2012, the number of farms in Sullivan County was stable, with a net loss of only two farms.



Farm Acreage

Land in farms in Sullivan County totaled 53,859 acres in 2012, a slight increase from 50,443 in 2007. Although the amount of land in farms overall has declined since the 1970s and '80s, the rate of decline has been much less severe in the County than in other locations. This may be due to the fact that Sullivan County has experienced less development pressure than counties like Orange. It should be noted, however, that a decline in the amount of land devoted to agriculture does not necessarily mean that the land has been converted to residential, commercial, or other more intensive uses; rather, it simply indicates that the land is no longer in active production.



Total cropland in Sullivan County in 2012 was 22,794 acres, comprising approximately 42% of all farmland acreage. Despite some fluctuations, the amount of cropland has been declining, and it makes up a smaller proportion of the land in farms today than it did a decade ago. An increasing percentage of the cropland is being harvested, though it is mainly for hay and corn to feed livestock rather than for vegetables.

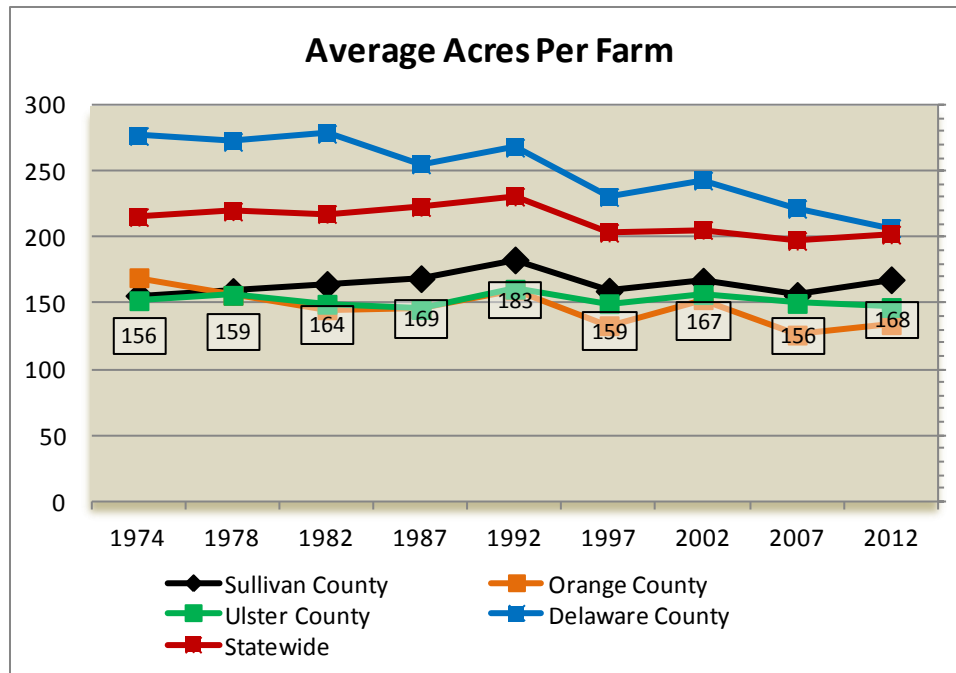
In 2012, the largest share of farms in Sullivan County (30.2%) was in the 10- to 49-acre range, followed by those with 180 to 499 acres (22.4%). As the Glynwood Center observed in its report *The State of Agriculture in the Hudson Valley*, statistics from the Census of Agriculture "skew toward smaller farms because of the Census definition of 'farm.' However, we are seeing more small farms emerging in the region, often as new ventures dedicated to making locally grown food available to consumers" (p. 20). Only 23 Sullivan County farms, or 7.2%, had at least 500 acres.

Since 2002, there has been a reduction in the number of farms in virtually all size categories, with mid-sized farms of 50 to 499 acres experiencing the greatest losses in numbers (i.e., 46 out of the 60 farms lost).

Sullivan County - Farms by Size								
Acreage	2012		2007		2002		% Change, 2002-12	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1-9	27	8.4%	19	5.9%	27	7.1%	0	0.0%
10-49	97	30.2%	81	25.1%	107	28.1%	-10	-9.3%
50-99	48	15.0%	61	18.9%	62	16.3%	-14	-22.5%
100-179	54	16.8%	73	22.6%	66	17.3%	-12	-18.2%
180-499	72	22.4%	66	20.4%	92	24.1%	-20	-21.7%
500-999	15	4.7%	19	5.9%	19	5.0%	-4	-21.1%
1,000 or more	8	2.5%	4	1.2%	8	2.1%	0	0.0%
TOTAL FARMS	321	100.0%	323	100.0%	381	100.0%	-60	-15.7%

Source: U.S. Census of Agriculture, 2002, 2007, and 2012.

The average farm in Sullivan County in 2012 was 168 acres, an increase from 156 acres in 2007. The New York State average was 202 acres, up from 197 five years earlier.



Farms by Principal Product

Sullivan County has a variety of agricultural operations and activities. The table below shows the classification of farms by principal product.¹

Sullivan County - Farms by Principal Product (NAICS Classification)								
	2012		2007		2002		% Change, 2002-12	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Mixed crops, hay, and other crops	86	26.8%	94	29.1%	100	26.2%	-14	-14.0%
Mixed livestock, horses, and other animals	74	23.1%	75	23.2%	73	19.2%	1	1.4%
Beef cattle	40	12.5%	39	12.1%	51	13.4%	-11	-21.6%
Nursery & greenhouse	27	8.4%	24	7.4%	26	6.8%	1	3.8%
Dairy	24	7.5%	26	8.0%	46	12.1%	-22	-47.8%
Vegetables and melons	23	7.2%	19	5.9%	17	4.5%	6	35.3%
Sheep and goats	19	5.9%	8	2.5%	18	4.7%	1	5.6%
Poultry and eggs	12	3.7%	23	7.1%	20	5.2%	-8	-40.0%
Fruit and nuts	8	2.5%	3	0.9%	13	3.4%	-5	-38.5%
Hogs and pigs	6	1.9%	3	0.9%	5	1.3%	1	20.0%
Oilseed and grains	1	0.3%	2	0.6%	6	1.6%	-5	-83.3%
Cattle feedlots	1	0.3%	7	2.2%	6	1.6%	-5	-83.3%
TOTAL FARMS	321	100.0%	323	100.0%	381	100.0%	-60	-15.7%

Source: U.S. Census of Agriculture, 2002, 2007, and 2012.

Although nearly half of farms in 2012 produced mixed crops or livestock, 40 or 12.5% of farms raised beef cattle, while 27 or 8.4% grew nursery stock, flowers, and plants. The dairy sector has continued to decline. In 1987, 30% of all farms in Sullivan County were dairy farms; in 2012, dairy farms made up just 7.5% of the farms in the County. Similar to national and state trends, the number of dairy farms in Sullivan County declined more than 70% over the 25-year period.

Compared to 2002, Sullivan County has fewer farms raising beef cattle, producing milk, or breeding, hatching, and raising poultry (which includes not only chickens, but also ducks and geese) for meat or egg production. Conversely, there are *more* farms growing vegetables and melons. However, vegetable farms comprise a relatively small proportion of the farms in Sullivan County, especially compared to Orange and Ulster Counties.

¹ "Principal product" refers to the crop or animal accounting for at least 50% of the farm's agricultural production. Farms that produce a combination of crops or animals, with no one category accounting for 50% or more of the establishment's agricultural production, are included under "Other Crops" or "Other Animals."

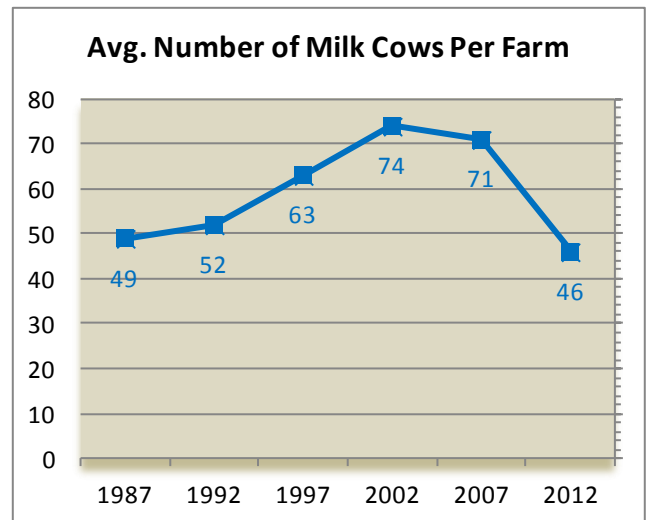
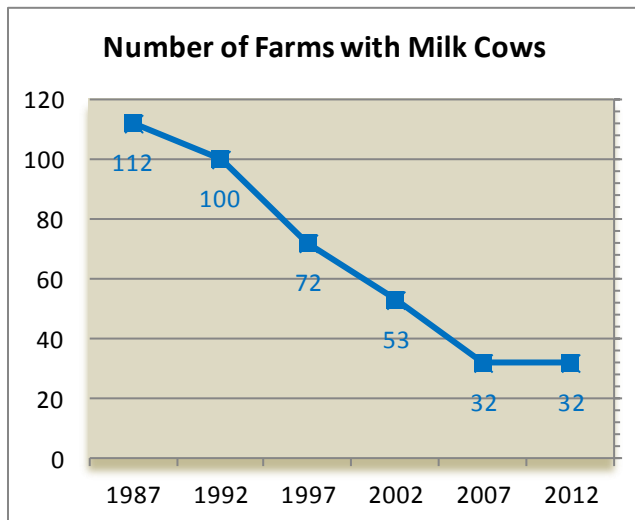
Livestock Inventories

The livestock sector includes cattle and calves, horses, chickens, hogs and pigs, sheep and lambs, ducks and geese, goats, and other livestock. As shown in the table below, 106 farms, or roughly a third of all farms in Sullivan County, had horses and ponies in 2012. The number of farms with horses has been declining, but the *inventory* of horses in the County increased nearly 15% between 2002 and 2012.

Sullivan County - Farms with Livestock Inventory								
Livestock	2012		2007		2002		% Change, 2002-12	
	Farms	Number	Farms	Number	Farms	Number	Farms	Number
Horses and ponies	106	1,249	111	1,192	132	1,087	-19.7%	14.9%
Layers	88	NA	64	NA	65	NA	35.4%	NA
Beef cattle	64	880	79	1,215	75	875	-14.7%	0.6%
Sheep and lambs	37	485	31	729	48	1,010	-22.9%	-52.0%
Ducks and geese	35	NA	35	NA	25	NA	40.0%	NA
Dairy cattle and milk production	32	1,484	32	2,272	53	3,948	-39.6%	-62.4%
Goats	24	506	44	460	15	NA	60.0%	NA
Hogs and pigs	19	233	23	425	19	206	0.0%	13.1%

Source: U.S. Census of Agriculture, 2002, 2007, and 2012.

Reflecting the continuing decline of the dairy industry in Sullivan County, there was a 62% reduction in the number of milk cows and a nearly 40% reduction in the number of farms with dairy cattle between 2002 and 2012. Farms with beef cattle and sheep and lambs also experienced a decline, while the number of farms with chickens (layers) and ducks and geese increased.



Other livestock raised in Sullivan County in 2012 included alpacas (16 farms and a total inventory of 273 animals) and llamas (8 farms, 10 animals).

Crops Harvested

Crops grown in Sullivan County include grain, hay and forage, vegetables, fruit and nuts, and nursery and greenhouse products grown in the open. In 2012, the most common crop in the County in terms of acreage was forage, which encompasses dry hay, haylage, grass silage, and greenchop. Hay production may be strong because of the prevalence of livestock farms in the County. However, as the livestock inventory has declined, so has the harvested forage.

Sullivan County - Farms with Crops Harvested								
	2012		2007		2002		% Change, 2002-12	
	Farms	Acres	Farms	Acres	Farms	Acres	Farms	Acres
Forage	146	17,773	186	19,636	218	24,489	-33.0%	-27.4%
Vegetables for sale	30	140	31	151	28	147	7.1%	-4.8%
Corn for silage	25	1,073	21	882	30	1,324	-16.7%	-19.0%
Land in orchards	16	55	9	25	21	213	-23.8%	-74.2%
Corn for grain	6	214	3	NA	6	370	0.0%	-42.2%

Source: U.S. Census of Agriculture, 2002, 2007, and 2012.

In addition to the products listed in the table, nine farms in Sullivan County produced maple syrup in 2012, while 21 farms had bee colonies.

The Agricultural Census indicates that in 2012, 8.1% of farms in Sullivan County marketed their products direct to retail outlets, 8.7% produced or sold value-added commodities, and 1.9% had an on-farm packing facility. Rates of participation in these practices are generally less than in surrounding counties; this may be due to the fact that Sullivan County has fewer fruit and vegetable producers.

Farm Operators

In 2012, there were 494 farm operators in Sullivan County. The average age of a principal farm operator – i.e., the person primarily responsible for day-to-day operation of the farm – was 59.7 years, and they had spent, on average, 25 years running a farm. The average age of a farmer statewide was 57.1. As state and national farm advocacy organizations have noted, many experienced farmers are reaching retirement age; the question is whether new and younger farmers, including family members, will be available to take their place.

According to the Census of Agriculture, only 6 principal farm operators in Sullivan County, or 1.9%, were under age 35 in 2012, a decline from 12 (3.7%) in 2007 and 17 (5.3%) in 2002. Thirteen (13) farm

operators indicated they had been on their current Sullivan County farm for less than 2 years, while 11 had been on their present farm for three to four years.

Sullivan County – Selected Characteristics of Principal Farm Operators								
	2012		2007		2002		% Change, 2002-12	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Occupation: Farming	191	59.5%	164	50.8%	243	63.8%	-52	-21.4%
Occupation: Other	130	40.5%	159	49.2%	138	36.2%	-8	-5.8%
Under Age 35	6	1.9%	12	3.7%	17	5.3%	-11	-6.5%
35 to 44 Years	33	10.3%	42	13.0%	73	19.2%	-40	-54.8%
45 to 54 Years	88	27.4%	82	25.4%	104	27.3%	-16	-15.4%
55 to 64 Years	84	26.2%	80	24.8%	96	25.2%	-12	-12.5%
65 Years and Over	110	34.3%	107	33.1%	91	23.9%	19	20.9%
Average Age	59.7		57.7		54.8		4.9	8.9%

Source: U.S. Census of Agriculture, 2002, 2007, and 2012.

More farm operators in Sullivan County reported their primary occupation as farming in 2012 (59.5%) than in 2007 (50.8%), but this was less than in 2002 (63.8%).

Farm Ownership

More than three-quarters of the farms in Sullivan County in 2012 were owned by individuals and families, 11.8% by partnerships, and 8.4% by family-held corporations. Less than 1% were owned by non-family held corporations.

Sullivan County – Farm Tenure and Type of Organization								
	2012		2007		2002		% Change, 2002-12	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Full Owners	200	62.3%	197	61.0%	235	61.7%	-35	-14.9%
Part Owners	106	33.0%	119	36.8%	134	35.2%	-28	-20.9%
Tenants	15	4.7%	7	2.2%	12	3.1%	3	25.0%
Family or Individual	246	76.6%	254	78.6%	328	86.1%	-82	-25.0%
Partnership	38	11.8%	30	9.3%	25	6.6%	13	52.0%
Family-Held Corporation	27	8.4%	35	10.8%	23	6.0%	4	17.4%
Other Corporation	3	0.9%	2	0.6%	4	1.0%	-1	-25.0%
Other (Cooperative, Trust, Estate, Etc.)	7	2.2%	2	0.6%	1	0.3%	6	600.0%

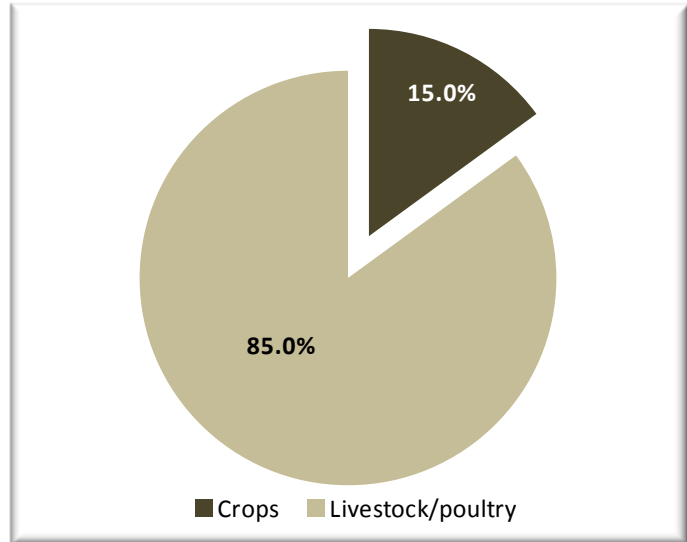
Source: U.S. Census of Agriculture, 2002, 2007, and 2012.

The majority of Sullivan County farmers own at least some of the land that they farm. These numbers have been relatively consistent over the last 10 years, with approximately 62% farming only the land that they own, 33% farming land they owned as well as land owned by others, and less than 5% operating farms as tenants.

Economic Trends in Agriculture

Farm Sales

Sullivan County's 321 farms generated \$27.1 million in cash receipts in 2012, with the livestock and poultry sector contributing the largest percentage (see chart). Cash receipts from livestock production totaled \$23,045,000, while receipts from crops totaled \$4,055,000.



Poultry and egg production generated more than \$12 million, accounting for 45% of total farm sales and 53% of all livestock sales in the County. These figures reflect a reduction from 2007, when poultry and eggs generated \$27.7 million or about *two-thirds* of total farm sales. That year, Sullivan

County accounted for more than 22% of New York State's poultry and egg sales, with Onondaga County a distant second at 8.2%. By 2012, Sullivan County's share was down to 8.5%, surpassed by Suffolk County with 16.7% and Onondaga with 9.5% of poultry and egg sales in the state.

Other major components of sales in Sullivan County in 2012 included milk and other dairy products (18.2%), cattle and calves (9.8%), and horses and ponies (9.4%). Along with poultry and eggs, these four commodity groups made up 91% of Sullivan County's agricultural output.

Between 2007 and 2012, overall sales of agricultural products in Sullivan County declined nearly 36%. As reflected in the table below, all of the crop commodities, with the exception of cut Christmas trees, experienced increased sales, as did horses, beef cattle, and sheep and goats. These increases, however, were not enough to offset significant reductions in the sales of dairy products and poultry and eggs.

Value of Sales by Commodity, Sullivan County					
	2012		2007		% Change, 2007-2012
	Number	Percent	Number	Number	
Crops, incl. nursery & greenhouse	\$4,055,000	15.0%	\$2,088,000	5.0%	94.2%
Grains, oilseeds, dry beans/peas	\$410,000	1.5%	\$72,000	0.2%	469.4%
Vegetables/melons/potatoes	\$728,000	2.7%	\$486,000	1.2%	49.8%
Fruits/berries	\$264,000	1.0%	\$108,000	0.3%	144.4%
Nursery/greenhouse/sod	\$417,000	1.5%	\$328,000	0.8%	27.1%
Cut Christmas trees/woody crops	\$49,000	0.2%	\$141,000	0.3%	-65.2%

Value of Sales by Commodity, Sullivan County					
	2012		2007		% Change, 2007-2012
	Number	Percent	Number	Number	
Other crops and hay	\$2,189,000	8.1%	\$953,000	2.3%	129.7%
Livestock & poultry	\$23,045,000	85.0%	\$40,029,000	95.0%	-42.4%
Poultry and eggs	\$12,250,000	45.2%	\$27,679,000	65.7%	-55.7%
Cattle and calves	\$2,666,000	9.8%	\$2,321,000	5.5%	14.9%
Milk and dairy products	\$4,936,000	18.2%	\$7,468,000	17.7%	-33.9%
Hogs and pigs	\$33,000	0.1%	\$67,000	0.2%	-50.7%
Sheep, goats, wool, mohair	\$204,000	0.8%	\$76,000	0.2%	168.4%
Horses, ponies, mules, donkeys	\$2,539,000	9.4%	\$735,000	1.7%	245.4%
All other animal products	\$418,000	1.5%	\$1,683,000	4.0%	-93.4%
TOTAL SALES	\$27,100,000	100.0%	\$42,117,000	100.0%	-35.7%

Source: U.S. Census of Agriculture, 2007 and 2012.

Direct-to-consumer sales of farm products in Sullivan County increased 4%, from \$624,000 in 2007 to \$649,000 in 2012. Although farmers markets have provided outlets for local farmers to sell produce and meats, Sullivan County has a low level of direct-to-consumer sales compared to other counties in the Mid-Hudson Region. In Dutchess, Orange, and Ulster Counties, for example, the value of agricultural products sold directly to individuals is measured in the *millions*, not thousands, of dollars.

Average sales per farm in Sullivan County were \$84,424 in 2012. There are, however, significant differences depending on the agricultural products sold, as shown in the table below. Farms with livestock sales generated significantly higher average sales per farm (\$131,686) than those with sales of crops (\$23,576). The highest average sales were among farms that sold dairy products (\$189,846), poultry and eggs (\$157,051), and horses (\$81,903).

Average Sales Per Farm by Commodity, Sullivan County, 2012						
	2012		2007		% Change, 2007-2012	
	# Farms	Avg Sales	# Farms	Avg Sales	# Farms	Avg Sales
Crops, incl. nursery & greenhouse	172	\$23,576	175	\$11,931	-1.7%	97.6%
Grains, oilseeds, dry beans/peas	25	\$16,400	13	\$5,538	92.3%	196.1%
Vegetables/melons/potatoes	31	\$23,484	31	\$15,677	0.0%	49.8%
Fruits/berries	15	\$17,600	8	\$13,500	87.5%	30.4%
Nursery/greenhouse/sod	16	\$26,063	19	\$17,263	-15.8%	51.0%
Cut Christmas trees/woody crops	10	\$4,900	18	\$7,833	-44.4%	-37.4%
Other crops and hay	116	\$18,871	123	\$7,748	-5.7%	143.6%
Livestock & poultry	175	\$131,686	188	\$212,920	-6.9%	-38.2%
Poultry and eggs	78	\$157,051	78	\$354,859	0.0%	-55.7%
Cattle and calves	85	\$31,365	89	\$26,079	-4.5%	20.3%

Average Sales Per Farm by Commodity, Sullivan County, 2012						
	2012		2007		% Change, 2007-2012	
	# Farms	Avg Sales	# Farms	Avg Sales	# Farms	Avg Sales
Milk and dairy products	26	\$189,846	33	\$226,303	-21.2%	-16.1%
Hogs and pigs	19	\$1,737	21	\$3,190	-9.5%	-45.6%
Sheep, goats, wool, mohair	29	\$7,034	37	\$2,054	-21.6%	242.5%
Horses, ponies, mules, donkeys	31	\$81,903	22	\$33,409	40.9%	145.2%
ALL COMMODITIES	321	\$84,424	323	\$130,393	-0.6%	-35.3%

Source: U.S. Census of Agriculture, 2007 and 2012.

The majority of the farms in Sullivan County do not generate significant income from the sale of agricultural products. As indicated below, one-third of the farms had gross sales of less than \$2,500 in 2012, and an additional 22.1% had sales between \$2,500 and \$9,999. To qualify for an agricultural assessment in New York State, farms must earn at least \$10,000 annually from the sale of farm products; thus, less than half of the farms in Sullivan County are eligible to receive a partial tax exemption.

Farms by Value of Sales, Sullivan County					
Farm Size	2012		2007		% Change, 2007-2012
	Number	Percent	Number	Percent	
Less than \$2,500	107	33.3%	123	38.1%	-13.0%
\$2,500 to \$4,999	41	12.8%	30	9.3%	36.7%
\$5,000 to \$9,999	30	9.3%	26	8.0%	15.4%
\$10,000 to \$19,999	47	14.6%	53	16.4%	-11.3%
\$20,000 to \$24,999	11	3.4%	9	2.8%	22.2%
\$25,000 to \$49,999	25	7.8%	28	8.7%	-10.7%
\$50,000 to \$99,999	18	5.6%	16	5.0%	12.5%
\$100,000 to \$249,999	26	8.1%	18	5.6%	44.4%
\$250,000 to \$499,999	7	2.2%	6	1.9%	16.7%
\$500,000 or More	9	2.8%	14	4.3%	-35.7%
ALL FARMS	321	100.0%	323	100.0%	-0.6%

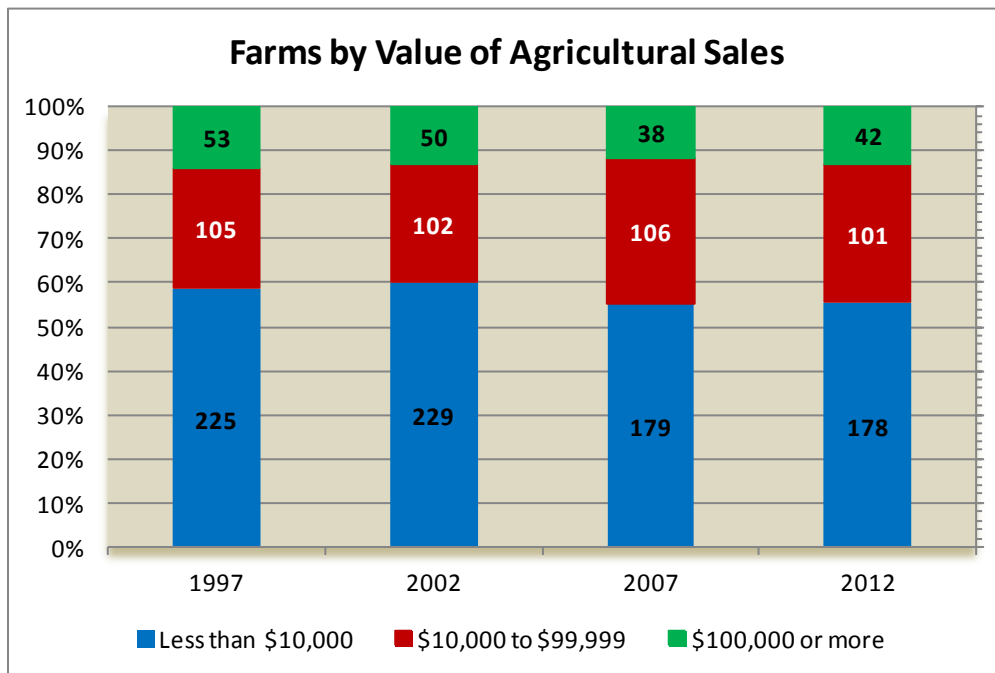
Source: U.S. Census of Agriculture, 2007 and 2012.

With approximately 60% of principal farm operators reporting their primary occupation as farming, it is assumed that some of these farmers earn additional income through other farm-related activities as well as the off-farm employment or business activities of other members of the household. In fact, according to the USDA, most farm households in the U.S. depend on the availability of off-farm employment for their financial well-being:

In recent years, 85-95 percent of farm household income has come from off-farm sources (including employment earnings, other business activities, and unearned income). The relative importance of off-farm income varies considerably from farm to farm, and declines as farm commodity sales increase... For the 82 percent of U.S. farming operations that have annual sales of \$100,000 or less, off-farm income typically accounts for all but a negligible amount of farm household income.²

Most of Sullivan County’s agricultural sales come from a relatively small number of farms. In 2012, farms with \$500,000 or more in sales accounted for only 3% of all Sullivan County farms, but they produced 63% of the County’s agricultural output. Farms with sales of at least \$100,000 generated more than 87% of the agricultural output.

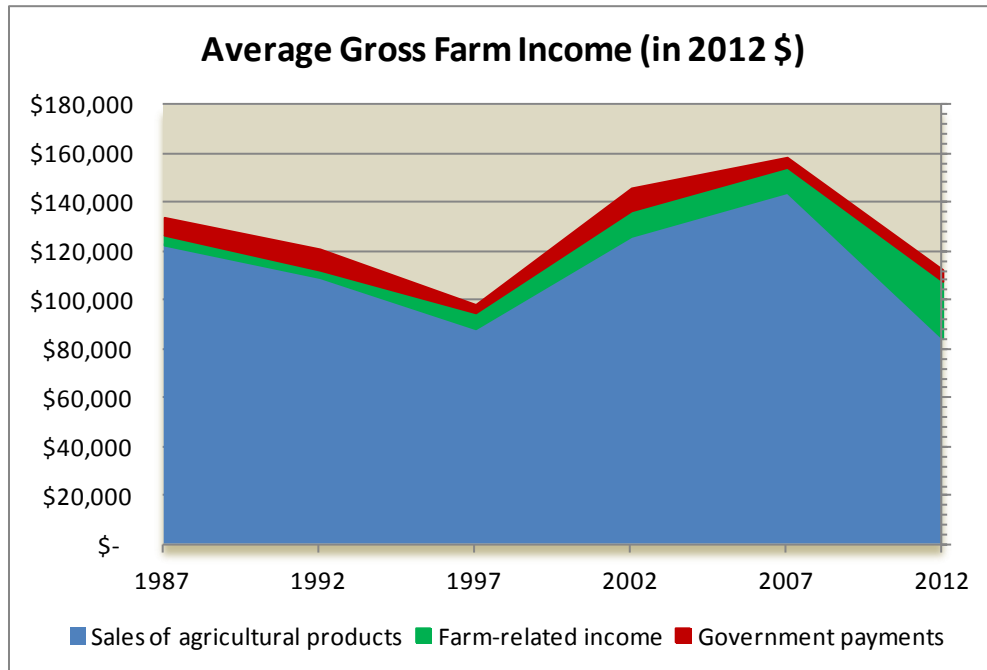
As the chart below illustrates, there has been little change in the sales distribution of farms in Sullivan County over the last 15 years. Farms with sales of less than \$10,000, for example, represented roughly 55-60% of all farms in the County between 1997 and 2012. This suggests that the largest farm operations in Sullivan County – those with annual sales exceeding \$100,000 – continue to dominate the local agricultural sector, while the operators of smaller farms must look to non-farm sources of income to support their households.



² U.S. Department of Agriculture. “Farm Family Income,” Farm Bill Forum Comment Summary & Background, March 28, 2006. Accessed at http://www.usda.gov/documents/FARM_FAMILY_INCOME.pdf. See also “Most farmers receive off-farm income, but small-scale operators depend on it,” at <http://www.ers.usda.gov/data-products/chart-gallery/detail.aspx?chartId=40163>.

Gross Farm Income

Gross farm income includes income from the sale of agricultural products, rental of farmland, custom farm work (e.g., planting, plowing, spraying) provided to others, agritourism and recreational services, crop and livestock insurance payments, government payments, and “other sales and services closely related to the principal functions of the farm business” before taxes and expenses. The chart below shows the components of average gross farm income in Sullivan County, from 1987 through 2012, in constant 2012 dollars (i.e., adjusted to account for inflation).



Sullivan County farms averaged \$112,912 in gross income in 2012. Although average gross farm income rose in nominal dollars from \$66,487 in 1987, it declined by 16% in inflation-adjusted dollars over the 25-year period. Of the three components of gross farm income, only income from farm-related sources increased. Unfortunately, data in many of the categories that make up the farm-related income calculation has been suppressed to avoid disclosing information about individual respondents. As a result, it is not possible to determine which sources accounted for the increase.

Farm Production Expenses

Farm production expenses include agricultural chemicals, equipment repairs and maintenance, feed, fertilizer, labor, livestock, petroleum products, property taxes, seed, and utilities. According to the Census of Agriculture, Sullivan County farms incurred more than \$27.2 million in production expenses in 2012. As indicated in the table below, feed for animals was the largest single production expense, comprising 34.3% of total farm expenses. Other significant expenses included hired labor (11.6%), the

purchase of livestock and poultry (9.2%), and real estate taxes paid on farm property (7.6%). Average production expenses per farm were \$84,878 in 2012. It is important to note that the figures in the table reflect the expenses of Sullivan County farms in the aggregate, and may obscure differences in the cost structures exhibited by different types of farms.

Total Farm Production Expenses, Sullivan County					
	2012		2007		% Change, 2007-2012
	Number	Percent	Number	Percent	
Agricultural Chemicals	\$522,000	1.9%	\$91,000	0.2%	473.6%
Energy - Electricity	\$881,000	3.2%	\$1,254,000	3.1%	-29.7%
Energy - Petroleum Products	\$1,408,000	5.2%	\$1,861,000	4.6%	-24.3%
Feed	\$9,345,000	34.3%	\$13,294,000	32.8%	-29.7%
Fertilizer	\$367,000	1.3%	\$416,000	1.0%	-11.8%
Labor - Contract	\$143,000	0.5%	\$223,000	0.6%	-35.9%
Labor - Hired	\$3,147,000	11.6%	\$7,914,000	19.5%	-60.2%
Livestock and Poultry	\$2,519,000	9.2%	\$3,281,000	8.1%	-23.2%
Property Taxes	\$2,061,000	7.6%	\$1,800,000	4.4%	14.5%
Seeds, Bulbs, Plants, & Trees	\$245,000	0.9%	\$194,000	0.5%	26.3%
Supplies, Repairs, & Maintenance	\$1,847,000	6.8%	\$2,627,000	6.5%	-29.7%
Other	\$4,761,000	17.5%	\$7,574,000	18.7%	-37.1%
TOTAL	\$27,246,000	100.0%	\$40,529,000	100.0%	-32.8%

Source: U.S. Census of Agriculture, 2007 and 2012.

Farm Profitability

Despite the decline in total production expenses, the *net* income of farms in Sullivan County (agricultural sales minus production expenses) declined dramatically over the last decade, with most of the decline occurring between 2002 and 2007. Approximately one-third of the farms in Sullivan County – compared to 42% in the counties of Delaware and Orange – made a profit in 2012.

Net Cash Farm Income, Sullivan County					
	2012	2007	2002	% Change, 2007-12	% Change, 2002-2007
Net cash farm income of the operations	\$2,671,000	\$2,747,000	\$12,280,000	-2.8%	-77.6%
<i>Average per farm</i>	\$8,322	\$8,504	\$32,146	-2.1%	-73.5%
Farms with net gains	32.4%	27.9%	34.6%	16.1%	-19.4%
<i>Average per farm</i>	\$88,183	\$87,547	\$122,232	0.7%	-28.4%
Farms with net losses	67.6%	72.1%	65.6%	-6.2%	9.9%
<i>Average per farm</i>	\$29,953	\$22,028	\$15,419	36.0%	42.9%

Source: U.S. Census of Agriculture, 2002, 2007, and 2012.

Fixed Assets

Farms are capital-intensive businesses that require significant investments in land, buildings, machinery, and equipment. In 2012, Sullivan County farms owned more than \$198 million in land and buildings. They also owned machinery and equipment such as trucks, tractors, and hay balers valued at \$23.9 million.

Farm Property and Equipment Values, Sullivan County					
	2012	2007	2002	% Change, 2007-12	% Change, 2002-2007
Market Value of Land & Buildings	\$198,345,000	\$176,189,000	\$199,438,000	12.6%	-11.7%
<i>Average Per Farm</i>	<i>\$617,896</i>	<i>\$545,478</i>	<i>\$522,088</i>	<i>13.3%</i>	<i>4.5%</i>
<i>Average Per Acre</i>	<i>\$3,683</i>	<i>\$3,493</i>	<i>\$2,798</i>	<i>5.4%</i>	<i>24.8%</i>
Market Value of Machinery & Equipment	\$23,947,000	\$26,163,000	\$25,677,000	-8.5%	1.9%
<i>Average Per Farm</i>	<i>\$74,601</i>	<i>\$81,001</i>	<i>\$72,534</i>	<i>-7.9%</i>	<i>11.7%</i>

Source: U.S. Census of Agriculture, 2002, 2007, and 2012.

Farm Labor

According to the 2012 Census of Agriculture, 94 farms in Sullivan County had hired labor in addition to their principal operators. These farms accounted for 377 employees with \$3,147,000 in annual payroll. Only 6 farms reported having 10 or more workers, but they accounted for 36% of the County's total farm employment.

Hired Farm Labor, Sullivan County						
	2012		2007		% Change, 2007-2012	
	# Farms	# Workers	# Farms	# Workers	# Farms	# Workers
Farms with 1 worker	25	25	17	17	47.1%	47.1%
Farms with 2 workers	25	50	16	32	56.3%	56.3%
Farms with 3 or 4 workers	24	82	21	75	14.3%	9.3%
Farms with 5 to 9 workers	14	85	13	85	7.7%	0.0%
Farms with 10 or more workers	6	135	3	203	100.0%	-33.5%
Total farms with hired labor	94	377	70	412	34.3%	-8.5%

Source: U.S. Census of Agriculture, 2007 and 2012.

Between 2007 and 2012, there was an increase in the number of farms with hired labor, but an 8.5% decline in the number of workers and a 60.2% decrease in annual payroll (from \$7,914,000).

Agriculture-Related Industry

As previously mentioned, Sullivan County farms spend more than \$27 million annually on production expenses, including animal feed, fertilizers, and the repair of farm equipment and machinery. Some of these supply inputs are purchased within the County, while others require farmers to travel to other areas to purchase goods and services.

Industry sectors linked (or potentially linked) to agriculture in Sullivan County include agricultural production support services, food manufacturing, selected components of the wholesale and retail trades, veterinary services, and landscaping.

Agriculture-Related Industry, Sullivan County			
Industry	Firms	Employment	Nonemployers
Support Activities for Crop Production (NAICS 11511)	0	0	10
Support Activities for Animal Production (11521)	2	0-19	20
Animal Food Manufacturing (31111)	2	20-99	0
Fruit and Vegetable Canning, Pickling, and Drying (31142)	0	0	NA
Dairy Product Manufacturing (31151)	1	100-249	NA
Animal Slaughtering and Processing (31161)	3	250-499	NA
Bread and Bakery Product Manufacturing (31181)	4	0-19	NA
Cookie, Cracker, and Pasta Manufacturing (31182)	1	20-99	NA
Snack Food Manufacturing (31191)	1	250-499	NA
Farm Product Raw Material Merchant Wholesalers (42459)	1	0-19	0
Dairy Product Merchant Wholesalers (42443)	2	0-19	NA
Poultry & Poultry Product Wholesalers (42444)	2	100-249	NA
Meat & Meat Product Wholesalers (42447)	1	0-19	NA
Flower & Nursery Stock Merchant Wholesalers (42493)	0	0	4
Nursery, Garden Center, and Farm Supply Stores (44422)	4	30	NA
Meat Markets (44521)	2	0-19	NA
Fruit and Vegetable Markets (44523)	1	0-19	4
Veterinary Services (54194)	8	47	NA
Landscaping Services (56173)	29	62	121

Source: *County Business Patterns and Nonemployer Statistics, 2012.*

Due to the small number of establishments, some of the data on employment in these sectors is undisclosed to maintain confidentiality. However, the County's 12 food manufacturing operations alone employ 950 workers, with an annual payroll of \$31.9 million. As indicated in the *Sullivan County Comprehensive Economic Development Strategic Plan*, poultry and dairy related operations dominate the County's food production sector and include Murray's Chickens, Hudson Valley Foie Gras, AGY Corp., Labelle Farms, Inc., and Formaggio Cheese, among others.

Estimating the Economic Contribution of Agriculture

The economic impact of agriculture in New York State has been the subject of a series of reports conducted over the last several years by professors at Cornell University's Charles H. Dyson School of Applied Economics & Management. Part of a broad effort to "update and document the importance of New York's major agricultural industries to the State's economy," these reports have provided updated baseline economic information on the current status and trends in the economic activity of New York State's agricultural and food system; evaluated inter-industry linkages within the state's agricultural and food system; and assessed the overall economic contribution of agricultural production, support services, and processing to the state's economy.

In lieu of a full-blown impact analysis, the methodology used by Todd M. Schmit in the May 2014 publication *Agriculture-Based Economic Development in New York State: The Contribution of Agriculture to the New York Economy* was, with Dr. Schmit's guidance, used as the basis to roughly estimate the economic impact of agriculture in Sullivan County.

The table on the next page provides a snapshot of the Sullivan County economy in 2012 based on aggregated industry data from IMPLAN. As in Dr. Schmit's report, the 440 industries in the IMPLAN database have been aggregated into 32 economic sectors. Twelve (12) of these are aligned with the County's agricultural and food system, including agricultural production, support services, and manufacturing. The other 20 economic sectors are defined by aggregating the remaining industries at the 2-digit NAICS level.

In total, agricultural production activity in Sullivan County generated about \$56.4 million in sales in 2012, accounting for 1.3% of total sales across all industries in the County. In terms of employment, agricultural production accounted for 372 jobs, which represented about 1.1% of total county employment. Livestock production comprised about 55% of the employment and nearly three-quarters of the total sales from agricultural production in the County.

Agriculture-related manufacturing industries contributed \$656.7 million in sales, or about 15% of all industry sales in Sullivan County. They also accounted for 1,042 jobs, representing 3.0% of the total employment. Most of the employment and sales were in the meat processing and "other" food and beverage manufacturing segments; the latter includes bread and bakery product operations and snack food manufacturers.

Overall, the direct economic contribution of agriculture on Sullivan County, encompassing production, support services, and manufacturing, included \$714.1 million in sales, or 16.0% of total industry sales, and 1,458 jobs, representing 4.1% of total employment. Agriculture also supported \$63.4 million in labor income, which is 4.4% of all labor income generated in the County. Labor income includes employee compensation (wages and benefits) and proprietor (self-employment) income.

Direct Economic Activity, Sullivan County, 2012

Description	Employment		Industry Sales (millions)		Labor Income (millions)	
	Jobs	Percent	Dollars	Percent	Dollars	Percent
Agricultural Production (total)	372	1.1%	\$56.41	1.3%	\$18.64	1.3%
Fruit & Vegetable	15	0.0%	\$1.90	0.0%	\$1.79	0.1%
Greenhouse & Nursery	4	0.0%	\$0.33	0.0%	\$0.49	0.0%
Grain, Oilseed, & Other Crops	38	0.1%	\$2.76	0.1%	\$1.24	0.1%
Dairy	112	0.3%	\$9.25	0.2%	\$1.95	0.1%
Beef, Poultry, & Other Animal	203	0.6%	\$42.16	0.9%	\$13.17	0.9%
Ag. & Forestry Support Activities	43	0.1%	\$0.98	0.0%	\$1.24	0.1%
Forestry and Commercial Logging, Fishing, and Hunting	68	0.2%	\$6.04	0.1%	\$2.48	0.2%
Mining	70	0.2%	\$13.40	0.3%	\$3.36	0.2%
Utilities	111	0.3%	\$88.75	2.0%	\$13.27	0.9%
Construction	2,440	6.9%	\$321.46	7.2%	\$71.37	5.0%
Agricultural Manufacturing (total)	1,042	3.0%	\$656.75	14.7%	\$43.56	3.0%
Dairy	119	0.3%	\$115.99	2.6%	\$6.35	0.4%
Fruit & Vegetable	0	0.0%	\$0.00	0.0%	\$0.00	0.0%
Meat & Animal Products	483	1.4%	\$254.90	5.7%	\$16.35	1.1%
Alcoholic Beverages	0	0.0%	\$0.00	0.0%	\$0.0	0.0%
Other Food/Beverage	432	1.2%	\$272.85	6.1%	\$20.16	1.4%
Fertilizers, Chemicals, Machinery	8	0.0%	\$13.01	0.3%	\$0.70	0.0%
Non-Food/Ag-Related Manufacturing	260	0.7%	\$97.36	2.2%	\$13.97	1.0%
Wholesale Trade	680	1.9%	\$132.51	3.0%	\$32.38	2.3%
Retail Trade	3,194	9.1%	\$231.81	5.2%	\$99.99	7.0%
Transportation and Warehousing	1,273	3.6%	\$92.62	2.1%	\$40.73	2.8%
Information	184	0.5%	\$63.42	1.4%	\$14.76	1.0%
Finance and Insurance	1,037	2.9%	\$315.87	7.1%	\$60.43	4.2%
Real Estate and Leasing	1,340	3.8%	\$586.20	13.1%	\$17.99	1.3%
Professional, Scientific, & Technical Services	1,800	5.1%	\$199.28	4.5%	\$49.67	3.5%
Mgmt. of Companies and Enterprises	343	1.0%	\$ 53.32	1.2%	\$17.92	1.2%
Administrative and Waste Services	932	2.6%	\$70.60	1.6%	\$31.40	2.2%
Educational Services	563	1.6%	\$21.55	0.5%	\$6.18	0.4%
Health and Social Services	6,978	19.8%	\$514.21	11.5%	\$297.90	20.8%
Arts, Entertainment, and Recreation	1,275	3.6%	\$76.42	1.7%	\$33.89	2.4%
Accommodations and Food Services	2,201	6.2%	\$174.42	3.9%	\$53.19	3.7%
Other Services	2,183	6.2%	\$162.34	3.6%	\$61.19	4.3%
Government/Government Enterprises	6,883	19.5%	\$525.29	11.8%	\$449.16	31.3%
Subtotal: All Agriculture	1,458	4.1%	\$714.13	16.0%	\$63.43	4.4%
Total, All Industries	35,273	100.0%	\$4,461.02	100.0%	\$1,434.66	100.0%

Source: Minnesota IMPLAN Group, Inc. (data only).

Based on methodology developed by Todd M. Schmit, Associate Professor, Dyson School of Applied Economics and Management, Cornell University, Agriculture-Based Economic Development in New York State: The Contribution of Agriculture to the New York Economy, May 2014.

The figures above reflect only the *direct* contributions made by agriculture in Sullivan County; they do not take into account the fact that these contributions generate *additional* employment, sales, and labor income as each dollar is subsequently re-circulated throughout the local economy. This is what is referred to as the multiplier effect. *Indirect effects* represent the activity by backward-linked supply chain industries – in other words, by companies and industries in the agricultural supply chain, such as feed suppliers, farm machinery manufacturers, finance and insurance companies, realtors, and so on. *Induced effects*, on the other hand, are the impacts resulting from the consumer spending of wages, salaries, and profits earned by operators and workers in the agricultural sector.

As noted in *The Contribution of Agriculture to the New York Economy*: “The implied output multiplier for all agriculture in NYS (i.e., the sum of the direct, indirect, and induced effects divided by the direct effect) is 1.43, meaning that for every additional dollar generated in agriculture, \$0.43 is generated in backward linked (nonagricultural) industries... If we decompose the multiplier effect into its indirect and induced components, the indirect effect is 0.27 (from business-to-business activity) and the induced effect is 0.16 (from labor income spending).” So, although agriculture in the state accounts for approximately 115,000 jobs, that figure increases to 206,604 jobs when indirect and induced effects are included.

A similar estimate of the total contribution of agriculture in Sullivan County can be made by using the multipliers for agriculture in New York State. As previously indicated, agriculture contributed \$714.13 million in output, 1,458 jobs, and \$63.43 million in labor income to the Sullivan County economy in 2012. *When indirect and induced efforts are considered, these values increase to an estimated \$1.02 billion in output, 2,625 jobs, and \$145.26 million in labor income* (see table below). The 2,625 jobs in agriculture accounted for 7.4% of total employment in Sullivan County, with the majority of jobs generated by agricultural manufacturing activity. Additionally, the estimated \$1.02 billion in output attributed to agriculture comprised nearly 23% of the County's total economic output.

Estimated Economic Contribution of Agriculture on the Sullivan County Economy, 2012						
	NYS Multiplier Applied			Total Contribution (Direct+Indirect+Induced)		
	Employment	Industry Output	Labor Income	Employment	Industry Output (millions)	Labor Income (millions)
Agricultural Production	1.45	1.61	1.69	540	\$90.82	\$31.50
Agricultural Support Svcs	1.12	1.83	1.33	49	\$1.78	\$1.64
Agricultural Manufacturing	2.83	1.56	2.99	2,950	\$1,024.52	\$130.24
All Agriculture	1.80	1.43	2.29	2,625	\$1,021.21	\$145.26
<i>% of All Sullivan Co. Industries</i>				7.4%	22.9%	10.1%

Source: Minnesota IMPLAN Group, Inc. (data only).

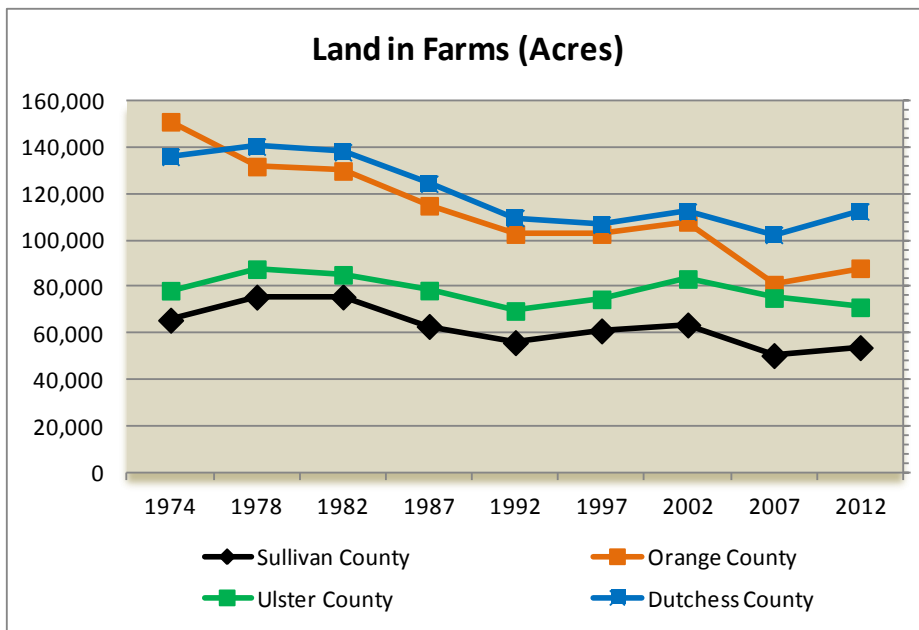
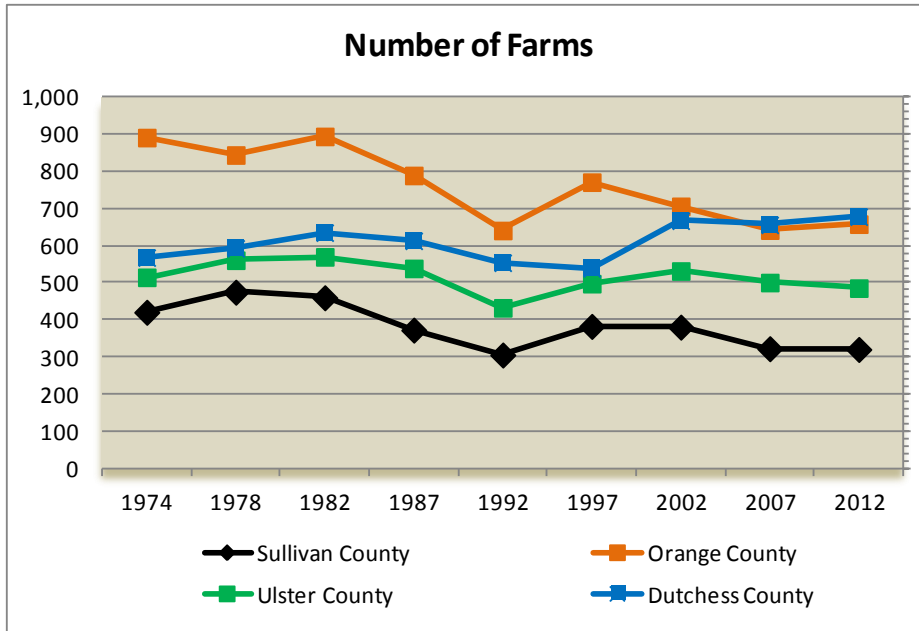
Based on methodology developed by Todd M. Schmit, Associate Professor, Dyson School of Applied Economics and Management, Cornell University, Agriculture-Based Economic Development in New York State: The Contribution of Agriculture to the New York Economy, May 2014.

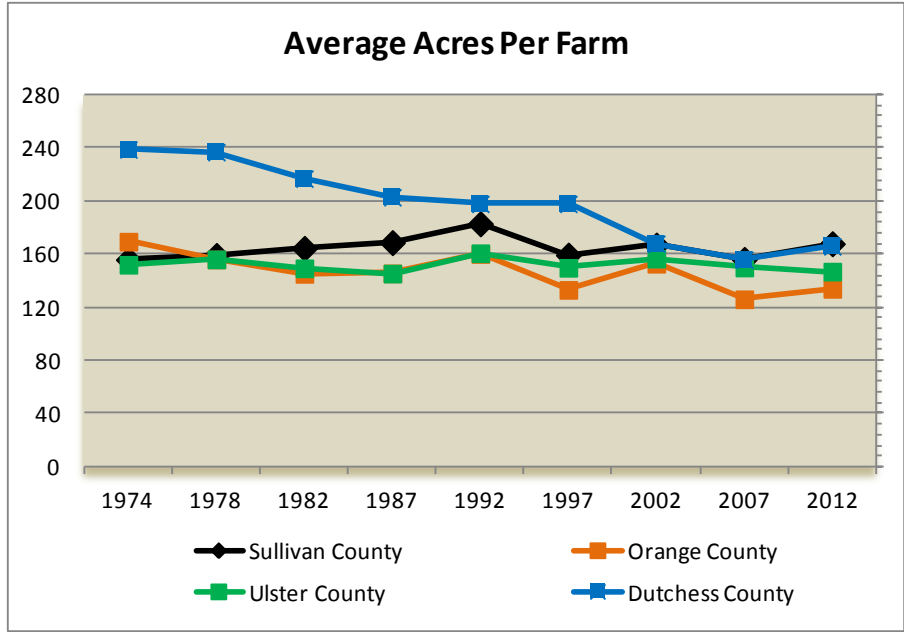
A 2010 report by the Glynwood Center, *The State of Agriculture in the Hudson Valley*, explains that agriculture, as an industry, has a relatively high economic impact because farmers purchase supplies and services from a wide range of business types, and also tend to “spend locally as much as possible so the impact of their spending in their local community is often much higher than that of other industries” (p. 32). Dairy farmers, for example, may generate income and employment for milk haulers, animal feed stores, fuel suppliers, farm equipment dealerships, and large-animal veterinarians, among others.

It is important to note that the size of an industry multiplier is based on multiple factors, including 1) the overall size and economic diversity of the area economy; 2) the economic sector under consideration; 3) the level of inter-industry activities and linkages; and 4) the “marginal propensity to consume,” or the extent to which any extra income gets spent, re-circulating in the local economy. Regions with large, diversified economies will have higher multipliers because businesses and households can purchase most needed goods and services locally. Conversely, rural areas have lower multipliers because businesses and households must use firms *outside* the area for supplies and services. Multipliers also vary across different sectors of the economy based on the mix of labor and other inputs and the propensity of each sector to buy goods and services from within the region. For these reasons, the total economic impact of agriculture in Sullivan County, developed using state-level multipliers, should be viewed as a “best guess” estimate.

Appendix D: Comparison of Mid-Hudson Counties

The following presents data from the U.S. Census of Agriculture comparing Sullivan with Dutchess, Orange, and Ulster Counties.





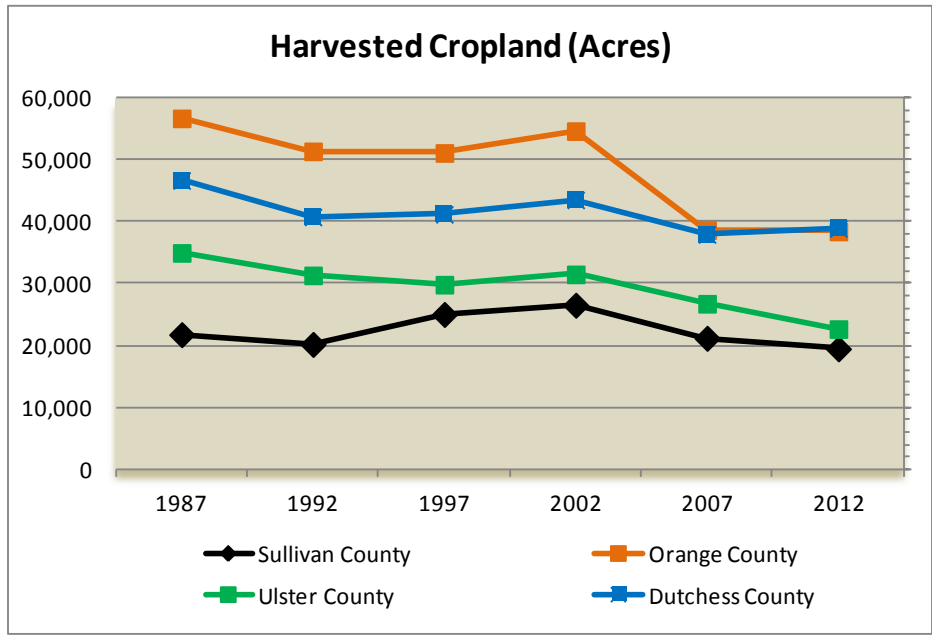
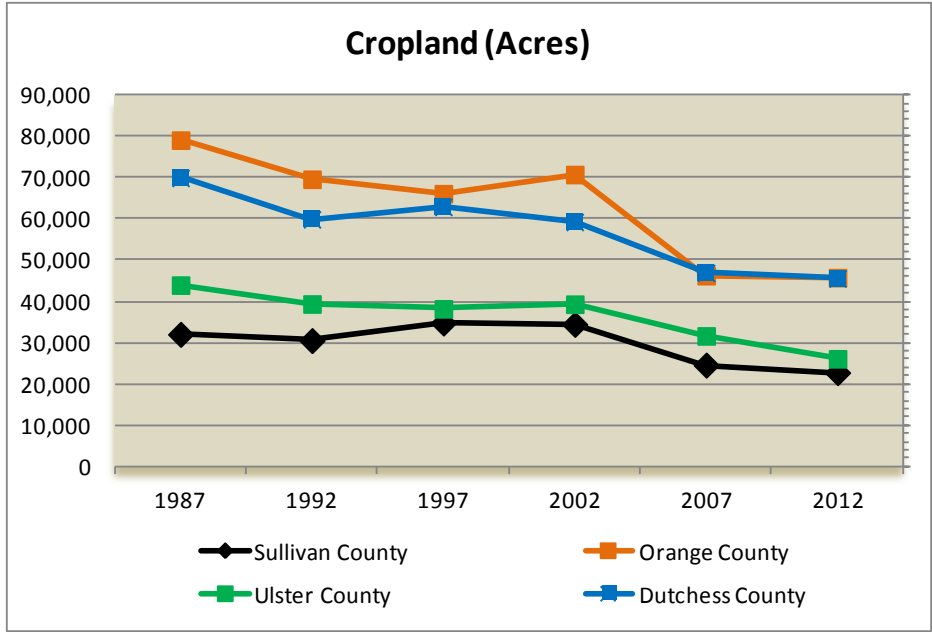
Hudson Valley Farms by Size, 2012								
Acreage	Sullivan		Orange		Ulster		Dutchess	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1-9	27	8.4%	72	10.9%	67	13.8%	85	12.5%
10-49	97	30.2%	205	31.2%	168	34.6%	217	32.0%
50-179	102	31.8%	239	36.3%	174	35.8%	218	32.2%
180-499	72	22.4%	112	17.0%	52	10.7%	109	16.1%
500-999	15	4.7%	22	3.3%	20	4.1%	35	5.2%
1,000 or more	8	2.5%	8	1.2%	5	1.0%	14	2.1%
Total	321	100.0%	658	100.0%	486	100.0%	678	100.0%

Hudson Valley Farms – Selected Practices, 2012								
County	Marketed Products Direct to Retail Outlets		Produced/Sold Value-Added Commodities		Marketed Products Through Community Supported Agriculture		On-Farm Packing Facility	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Sullivan	64	9.7%	55	8.4%	11	1.7%	28	4.3%
Orange	26	8.1%	28	8.7%	9	2.8%	6	1.9%
Ulster	72	14.8%	56	11.5%	28	5.8%	45	9.3%
Dutchess	72	10.6%	66	9.7%	10	1.5%	19	2.8%

Hudson Valley Farms by Value of Sales, 2012								
	Sullivan		Orange		Ulster		Dutchess	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than \$1,000	81	25.2%	155	23.6%	127	26.1%	171	25.2%
\$1,000 to \$2,499	26	8.1%	43	6.5%	30	6.2%	62	9.1%
\$2,500 to \$4,999	41	12.8%	39	5.9%	50	10.3%	41	6.0%
\$5,000 to \$9,999	30	9.3%	31	4.7%	70	14.4%	71	10.5%
\$10,000 to \$19,999	47	14.6%	104	15.8%	55	11.3%	73	10.8%
\$20,000 to \$24,999	11	3.4%	18	2.7%	15	3.1%	23	3.4%
\$25,000 to \$39,999	22	6.9%	38	5.8%	26	5.3%	45	6.6%
\$40,000 to \$49,999	3	0.9%	26	4.0%	14	2.9%	20	2.9%
\$50,000 to \$99,999	18	5.6%	53	8.1%	38	7.8%	59	8.7%
\$100,000 to \$249,999	26	8.1%	64	9.7%	22	4.5%	66	9.7%
\$250,000 to \$499,999	7	2.2%	47	7.1%	13	2.7%	29	4.3%
\$500,000 or More	9	2.8%	40	6.1%	26	5.3%	18	2.7%
Total	321	100.0%	658	100.0%	486	100.0%	678	100.0%
<i>Less than \$10,000</i>	<i>178</i>	<i>55.5%</i>	<i>268</i>	<i>40.7%</i>	<i>277</i>	<i>57.0%</i>	<i>345</i>	<i>50.9%</i>
<i>\$10,000 to \$99,999</i>	<i>101</i>	<i>31.5%</i>	<i>239</i>	<i>36.3%</i>	<i>148</i>	<i>30.5%</i>	<i>220</i>	<i>32.4%</i>
<i>\$100,000 or More</i>	<i>42</i>	<i>13.1%</i>	<i>151</i>	<i>22.9%</i>	<i>61</i>	<i>12.6%</i>	<i>113</i>	<i>16.7%</i>

Hudson Valley Farms by Commodity, 2012								
Farms with...	Sullivan		Orange		Ulster		Dutchess	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Cattles and calves	102	31.8%	118	17.9%	105	21.6%	160	23.6%
Beef cows	64	19.9%	42	6.4%	80	16.5%	102	15.0%
Milk cows	32	10.0%	51	7.8%	10	2.1%	35	5.2%
Hogs and pigs	19	5.9%	10	1.5%	37	7.6%	33	4.9%
Sheep and lambs	37	11.5%	32	4.9%	42	8.6%	77	11.4%
Layers	88	27.4%	65	9.9%	106	21.8%	143	21.1%
Corn for grain	6	1.9%	29	4.4%	21	4.3%	42	6.2%
Corn for silage	25	7.8%	49	7.4%	12	2.5%	33	4.9%
Wheat for grain	0	0.0%	2	0.3%	2	0.4%	1	0.1%
Oats for grain	0	0.0%	4	0.6%	7	1.4%	10	1.5%
Forage	146	45.5%	222	33.7%	187	38.5%	253	37.3%
Vegetables for sale	30	9.3%	122	18.5%	82	16.9%	84	12.4%
Land in orchards	16	5.0%	32	4.9%	95	19.5%	49	7.2%
Total	321	100.0%	658	100.0%	486	100.0%	678	100.0%
<i>Horses and ponies*</i>	<i>106</i>	<i>33.0%</i>	<i>233</i>	<i>35.4%</i>	<i>157</i>	<i>32.3%</i>	<i>294</i>	<i>43.4%</i>

*Farms with inventory. Farms with sales NA.
Note: numbers add up to more than 100% because some farms sell more than one commodity.



Hudson Valley Farms – Concentration of Sales, 2012								
County	All Farms			Farms with Sales of Less than \$500,000/Year				
	# of Farms	Total Sales	Average	# of Farms	% of Farms	Total Sales	% of Sales	Average
Sullivan	321	\$27,100,000	\$84,424	312	97%	\$10,149,000	37%	\$32,529
Orange	658	\$100,697,000	\$153,035	618	94%	\$35,340,000	35%	\$57,184
Ulster	486	\$55,899,000	\$115,019	460	95%	\$13,899,000	25%	\$30,215
Dutchess	678	\$49,022,000	\$72,303	660	97%	\$28,189,000	58%	\$42,711

Hudson Valley Farms – Total Sales (in 000s) In Constant 2012 Dollars					
	2012	2007	2002	1997	% change, 1997-2012
Sullivan County	\$27,100	\$46,641	\$48,154	\$33,425	-18.9%
Orange County	\$100,697	\$81,670	\$84,471	\$109,077	-7.7%
Ulster County	\$55,899	\$72,641	\$43,898	\$62,651	-10.8%
Dutchess County	\$49,022	\$49,685	\$40,449	\$51,618	-5.0%

Hudson Valley Farms – Average Sales Per Farm In Constant 2012 Dollars					
	2012	2007	2002	1997	% change, 1997-2012
Sullivan County	\$84,424	\$144,400	\$126,390	\$88,514	-4.6%
Orange County	\$153,035	\$127,213	\$119,645	\$141,474	8.2%
Ulster County	\$115,019	\$144,992	\$82,515	\$125,302	-8.2%
Dutchess County	\$72,303	\$75,740	\$60,643	\$78,092	-7.4%

Hudson Valley Farms - Agricultural Products Sold Directly to Individuals In Constant 2012 Dollars					
	2012	2007	2002	1997	% change, 1997-2012
Sullivan County	\$649,000	\$691,030	\$850,765	\$394,850	64.4%
Orange County	\$7,564,000	\$6,006,645	\$3,469,388	\$3,402,003	122.3%
Ulster County	\$3,504,000	\$3,067,553	\$6,442,602	\$3,665,236	-4.4%
Dutchess County	\$5,658,000	\$3,073,090	\$2,947,704	\$2,233,190	153.4%

Hudson Valley - Dairy Farms (i.e., farms with milk cows)							
	2012	2007	2002	1997	1992	1987	% change, 1987-2012
Sullivan County	32	32	53	72	100	112	-71.4%
Orange County	51	54	94	125	145	187	-72.7%
Ulster County	10	22	28	34	38	69	-85.5%
Dutchess County	35	38	45	64	81	126	-72.2%

Hudson Valley - Average Milk Cows Per Dairy Farm							
	2012	2007	2002	1997	1992	1987	% change, 1987-2012
Sullivan County	46	71	74	63	52	49	-6.1%
Orange County	73	89	87	76	71	65	12.3%
Ulster County	40	35	35	32	36	34	17.6%
Dutchess County	63	65	64	65	57	61	3.3%
NYS Average	113	110	91	80	67	59	91.5%

Appendix E: Agriculture & Property Taxes

This portion of the analysis uses 2013 data from the Sullivan County Real Property Tax Service to examine the property tax rates for taxing jurisdictions in the County. Although Sullivan County, like other areas of the state, has many types of jurisdictions that depend on property taxes to fund their operations, the major local taxing jurisdictions are Sullivan County, town governments, and school districts within the County. Property tax abatement programs including Agricultural Assessments are not considered nor used in any of the calculations that follow.

Property taxes are usually measured and reported in a “dollars per \$1,000” format, i.e., a designated rate per \$1,000 of the property’s assessed value. For example, in the Town of Lumberland, a property valued at \$100,000 has a County property tax rate of \$6.83 per \$1,000 in value. That property’s County tax bill would be \$683.00.

County Property Tax Rates

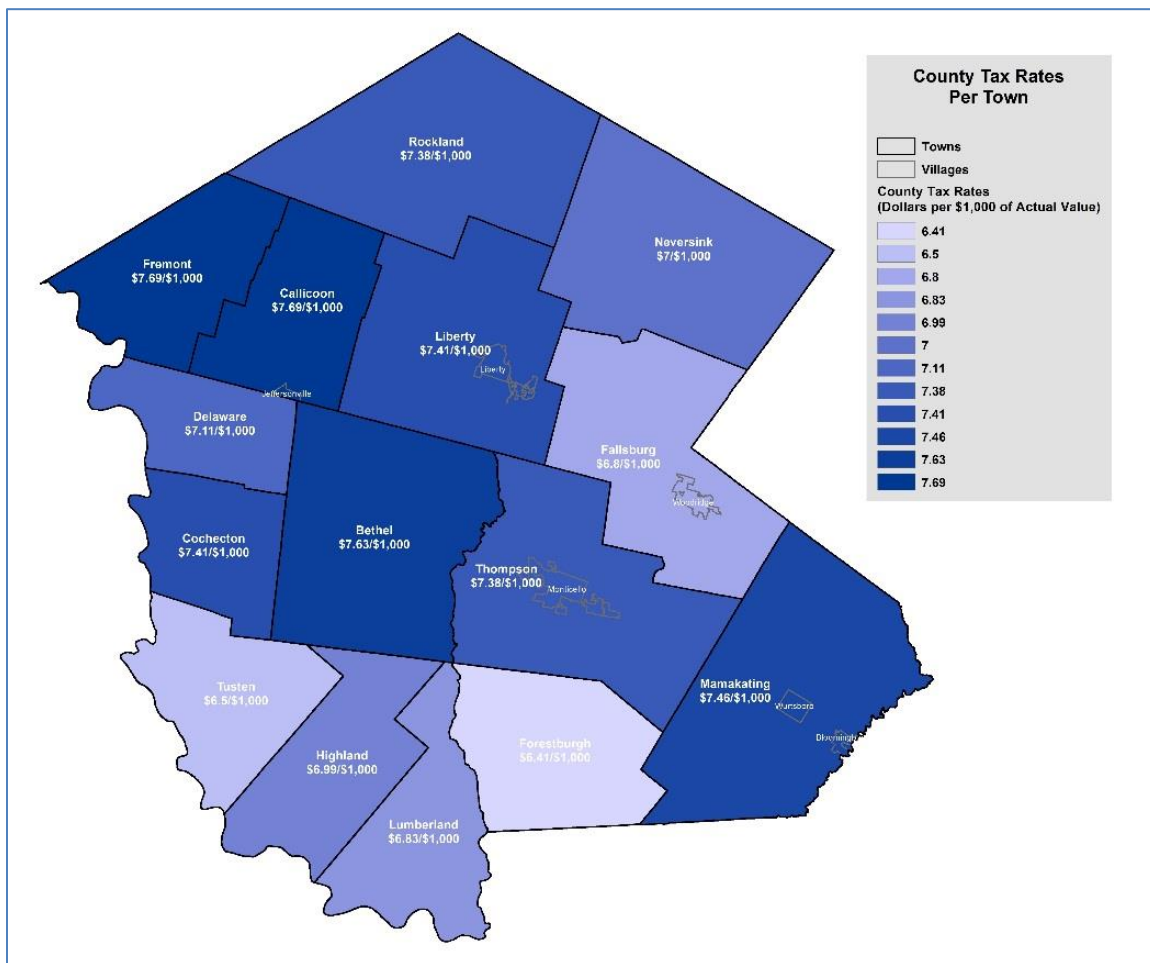
If every town assessed all of its tax parcels at full market value, the County property tax rate would be uniform for every town in the County. However, most towns do not have their properties assessed at 100% of market value. Therefore, an adjustment must be made in order to calculate a fair tax rate across municipalities. This adjustment is called the equalization rate (EQ).

The following chart shows the County tax rate applied to tax parcels within each town, and the effective County tax rate after adjusting for the various assessment levels by using the equalization rate.

County Property Tax Rates By Town – Adjusted For Full Value by the Equalization Rate			
	County Tax Rate	Equalization Rate	Effective County Tax Rate
Bethel	11.057142	69	\$7.63
Callicoon	11.147766	69	\$7.69
Cochecton	9.259569	80	\$7.41
Delaware	10.614615	67	\$7.11
Fallsburg	11.152376	61	\$6.80
Forestburgh	71.190033	9	\$6.41
Fremont	9.615864	80	\$7.69
Highland	7.513571	93	\$6.99
Liberty	9.070711	81.73	\$7.41
Lumberland	6.832317	100	\$6.83
Mamakating	11.255934	66.3	\$7.46
Neversink	179.398038	3.9	\$7.00
Rockland	10.772713	68.5	\$7.38
Thompson	8.575757	86	\$7.38
Tusten	11.664845	55.75	\$6.50

As the chart shows, the initial tax rate before applying the equalization rate varies widely. After applying the equalization rate, the numbers align much more closely. This is often a difficult concept to explain, and the cause of much confusion when discussing and comparing property taxes between municipalities. The raw tax rate (before applying the EQ) makes it appear there is a much wider variation in property taxes than there really is.

The map below shows where the effective County tax rates are higher due to the differences in assessments and equalization rate adjustments. The highest County tax rates are in the Towns of Callicoon and Fremont, with a rate of \$7.69 per \$1,000; the lowest effective County tax rate is in the Town of Forestburgh, with an effective rate of \$6.41 per \$1,000. This is a difference of \$1.28 per \$1,000.



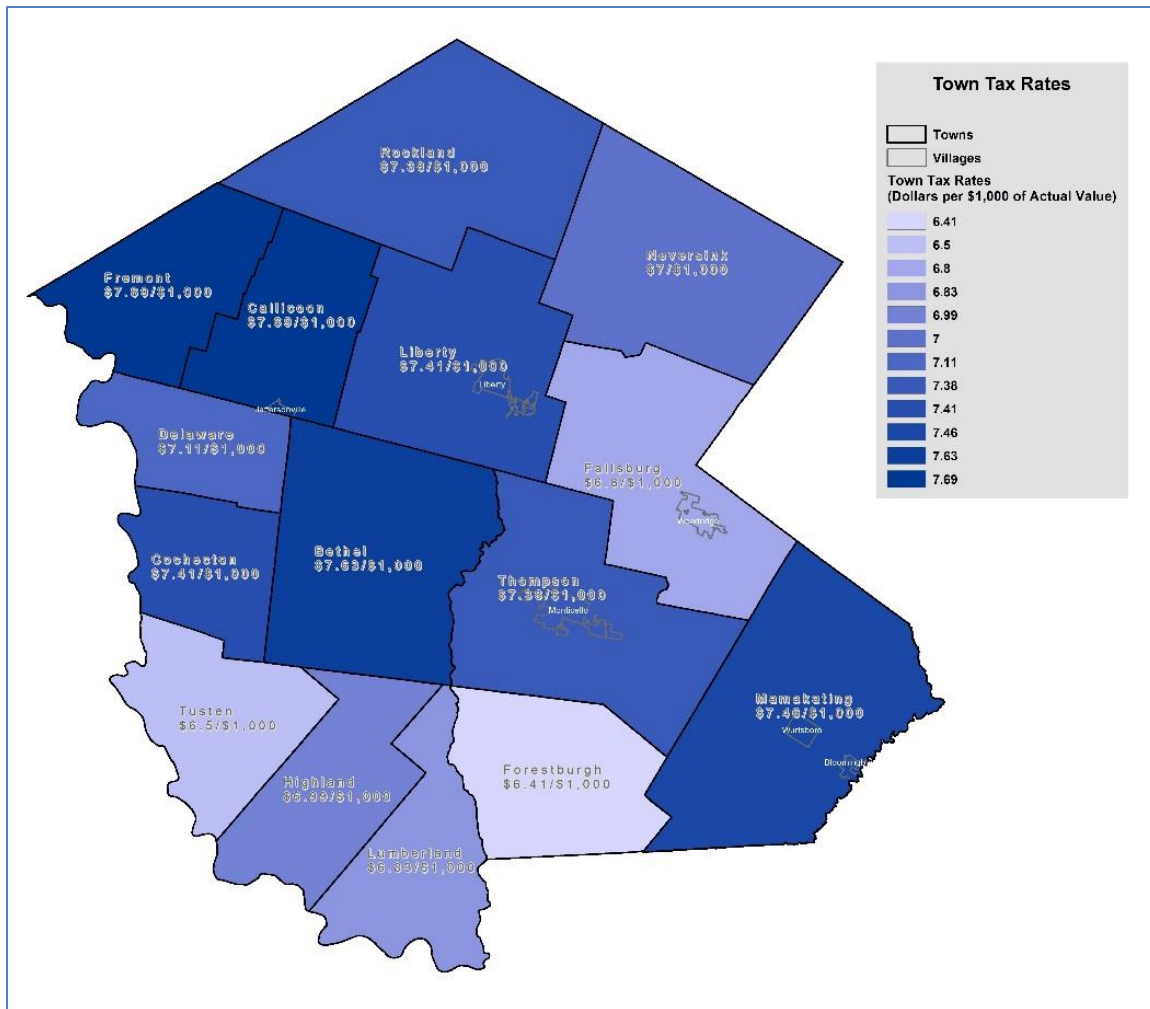
Town Property Tax Rates

Town property tax rates vary much more widely than the County tax rate. This wider range is due to the fact that there is no effort by the county to even out the tax rates at the town level. In addition, towns that have a lot of infrastructure (such as local roads) to maintain require more tax revenue to support that maintenance. Also, towns with overall lower property values or a smaller tax base require higher tax rates in order to raise the same amount of revenue as a town with higher property values and a larger tax base. A town with 50 miles of road to maintain and 1,000 low-value homes will require the same amount of revenue to maintain those roads as a town with 50 miles of road and 1,000 high-value homes. However, those high-value homes allow for a much lower tax rate to be applied.

The following chart shows the raw Town property tax rate, and the effective tax rate after adjusting for the Town's equalization rate.

Town Property Tax Rates – Adjusted for Full Value by the Equalization Rate			
	Town Tax Rate	Equalization Rate	Effective Town Tax Rate
Bethel	8.889909	69	\$6.13
Callicoon	9.653141	69	\$6.66
Cochecton	7.215118	80	\$5.77
Delaware	9.604427	67	\$6.43
Fallsburg	14.664446	61	\$8.95
Forestburgh	60.421989	9	\$5.44
Fremont	5.18296	80	\$4.15
Highland	4.641245	93	\$4.32
Liberty	6.982598	81.73	\$5.71
Lumberland	7.344279	100	\$7.34
Mamakating	4.447859	66.3	\$2.95
Neversink	114.423424	3.9	\$4.46
Rockland	9.591296	68.5	\$6.57
Thompson	5.210007	86	\$4.48
Tusten	11.214106	55.75	\$6.25

The map below shows the variation in effective Town tax rates across Sullivan County. The highest tax rate is found in the Town of Fallsburg, with an effective rate of \$8.95 per \$1,000. The lowest rate is found in the Town of Mamakating, with an effective rate of \$2.95 per \$1,000.



School District Property Tax Rates

School districts cross both Town and County boundaries. In Sullivan County, there are 39 unique combinations of Town and School District areas, each with its own raw tax rate. When the town equalization rate is applied, these differences disappear, with the exception of the portion of the Sullivan West school district within the Town of Liberty.

The following chart shows the effective tax rate for each school district in the County.

School District Tax Rates – Adjusted for Full Value by the Equalization Rate	
School District	Effective School Tax Rate
Eldred Central	\$13.77
Ellenville Central	\$21.07
Fallsburg Central	\$24.82
Liberty Central	\$28.99
Livingston Manor	\$15.48
Minisink Valley	\$22.41
Monticello Central	\$18.88
Pine Bush Central	\$22.98
Port Jervis City	\$27.75
Roscoe Central	\$14.07
Sullivan West	\$15.02
Sullivan West (in Liberty)	\$15.75
Tri-Valley Central	\$18.47

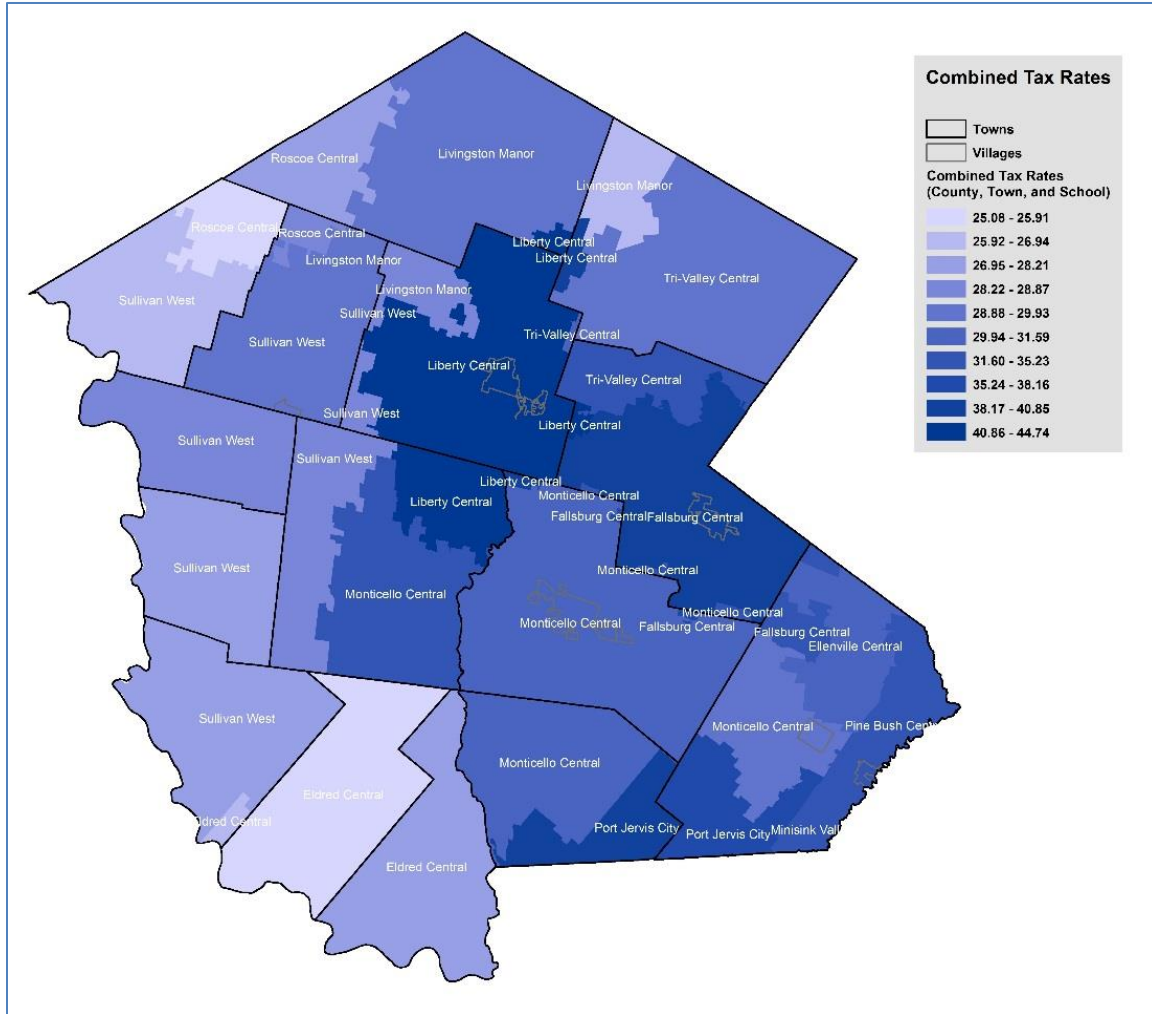
These school tax rates vary widely, from \$13.77 per \$1,000 in the Eldred Central School District in the southern portion of the County, to \$28.99 per \$1,000 in the Tri-Valley Central School District found in the northeastern portion of the County.

Combined Property Tax Rates

The map on the following page shows the variety of tax rates when all county, town, and school district taxes are combined (the map is labeled by school district). As the map shows, the highest overall tax rates are found in the central portion of the County in Liberty, extending into northeast Bethel, southeast Rockland, and covering most of Fallsburg. This area has a combined property rate of between \$40.45 and \$44.75 per \$1,000 of assessed value. That means a piece of land valued at \$100,000 could pay a combined property tax of between \$4,045 and \$4,475 annually, regardless of whether it is a single family home or farmland.

There are 146 identified farm parcels within this higher-tax area with an average assessed value of \$150,000. All but seven of these parcels are enrolled in the Agricultural Assessment Program.

Comparing these results with the county-to-county comparison later in this document, there is a wide range of property tax levels within the county that are not readily evident when looking at the overall county data.



Agricultural Assessment

Most states provide some sort of preferential treatment for farmland, with property that is actively used for agricultural production assessed at below market value. This preferential treatment is aimed at slowing the conversion of farmland to non-agricultural uses by assessing and taxing properties based on their *use value* in farming rather than their development or market value. This is especially valuable in areas experiencing development pressure.

A report by the Lincoln Institute of Land Policy explains that

use value assessment does not affect the overall level of spending or property tax levies by local governments, but rather affects the composition of the local property tax base. During and after the transition from assessment of agricultural at its highest and best use to assessment at its use in agriculture, agricultural lands pay a smaller share of all local government levies and non-agricultural properties pay a higher share, including a

shift from farm lands to farm homes, barns, etc.. It is a difficult and hotly debated judgment as to which distribution of local property taxes is most equitable...³

In New York State, a partial tax exemption is available to eligible farmland owners through the Agricultural Assessment Program. Under this program, eligible farmland is taxed at its estimated value for agricultural use rather than at market value.

To qualify for an agricultural assessment in New York State, farmland must meet the following requirements:

- The land consists of at least seven acres used in the preceding two years to produce crops, livestock, or livestock products, or for the commercial boarding of horses.
- Agricultural products produced on the land must have had an average gross sales value of at least \$10,000 during the previous two years.
- Land consisting of fewer than seven acres may qualify if the land supports a farm operation that has an average gross sales value of at least \$50,000.

Based on GIS data, 1,057 of the 1,157 parcels identified as farmland in Sullivan County have an agricultural assessment on them, resulting in a 91% rate of participation in the Agricultural Assessment Program. However, the entire parcel does not usually receive the exemption; only a portion of it does. So, while 91% of the farm parcels get an agricultural exemption, the exemption applies to just 60.7% of the acreage.

Another point that should be mentioned is that not all farm properties are classified as agricultural for assessment purposes. Some farms are classified as residential - e.g., a one-family residence, or a rural residence with acreage used in agricultural production - because a home is the primary use of the parcel.

The following chart list the number of farmed parcels found in each town in Sullivan County, the number of acres receiving an exemption under the Agricultural Assessment Program, and the resulting change in full market value:

³ Jack R. Huddleston, *The Property Tax and Planning*, Lincoln Institute of Land Policy, July 2005, p. 28. Accessed at <https://www.lincolnst.edu/subcenters/teaching-fiscal-dimensions-of-planning/materials/huddleston-prop-tax.pdf>.

Agricultural Assessment Exemptions – July 2013				
Town	Number of Farm Parcels	Total Acres	Acres Under Exemption	Total Change in Full Value Due to Exemption
Bethel	189	9,313.42	5,944.00	\$6,419,307
Callicoon	194	9,565.76	6,659.93	\$8,637,870
Cochecton	131	5,208.39	3,337.52	\$6,397,288
Delaware	189	8,417.31	1,472.65	\$7,385,376
Fallsburg	48	2,396.60	1,194.89	\$1,558,220
Forestburgh	9	155.61	139.43	\$399,744
Fremont	133	6,919.75	6,270.55	\$7,184,764
Highland	0	0	0	\$0
Liberty	102	4,838.55	3,523.15	\$2,324,979
Lumberland	0	0	0	\$0
Mamakating	37	1,879.62	1,173.50	\$1,421,370
Neversink	66	4,278.32	2,681.11	\$1,557,923
Rockland	32	2,781.37	1,661.05	\$1,678,018
Thompson	12	614.11	259.25	\$464,828
Tusten	15	726.49	359.90	\$504,761
Totals	1,157	57,095.32	34,676.94	\$45,934,445

Comparing Agricultural Property Values by Town in Sullivan County

The following chart shows the distribution of farm parcels by town in Sullivan County. The percentages of farmland property values were calculated after adjusting the assessed property values with the equalization rates. The Towns of Callicoon and Delaware have the highest percentage at 11%, followed closely by Cochection with 10% and Fremont with 8%.

Agricultural Property Values in Sullivan County								
Town	All Parcels	Farm Parcels	Assessed Value (000s)		EQ Rate	Total Value (000s)		Farm Parcels - % of Total Value
			All Parcels	Farm Parcels		All Parcels	Farm Parcels	
Bethel	7,517	189	\$541,408	\$25,121	69	\$784,649	\$36,408	5%
Callicoon	2,559	194	\$236,360	\$25,571	69	\$342,551	\$37,059	11%
Cochection	1,672	131	\$182,105	\$18,574	80	\$227,631	\$23,217	10%
Delaware	2,012	189	\$209,440	\$22,244	67	\$312,597	\$33,200	11%
Fallsburg	9,357	48	\$850,321	\$6,169	61	\$1,393,968	\$10,113	1%
Forestburgh	1,297	9	\$20,790	\$202	9	\$231,004	\$2,246	1%
Fremont	2,029	133	\$182,678	\$15,470	80	\$228,347	\$19,337	8%
Highland	2,751	0	\$371,814	\$0	93	\$399,800	\$0	0%
Liberty	6,228	102	\$600,467	\$14,077	81.73	\$734,696	\$17,223	2%
Lumberland	3,024	0	\$391,351	\$0	100	\$391,351	\$0	0%
Mamakating	9,068	37	\$675,797	\$4,702	66.3	\$1,019,302	\$7,092	1%
Neversink	2,968	66	\$35,598	\$230	3.9	\$912,776	\$5,899	1%
Rockland	3,616	32	\$307,322	\$5,220	68.5	\$448,646	\$7,620	2%
Thompson	10,354	12	\$1,455,626	\$2,322	86	\$1,692,589	\$2,700	0%
Tusten	2,024	15	\$143,329	\$2,282	55.75	\$257,092	\$4,093	2%
Totals	66,476	1,157	\$6,204,407	\$ 142,183	-	\$ 9,376,999	\$206,207	2%

Property Taxes on Agriculture – County Comparison

Data from the Census of Agriculture was used to examine farms, farm property, and real property taxes from 1987 to 2012, with comparisons to neighboring counties and New York State as a whole to determine whether farmers in Sullivan County pay disproportionately more in property taxes.⁴

The methodology is based on analyses conducted in Maine and Pennsylvania that examined the impact of property taxes on agriculture. Both of these studies acknowledged that while property taxes can be significant for some farms, they account for a relatively small share of production expenses. The Maine study concluded that “the property tax is not the culprit that is threatening the viability of agriculture in Maine. Constant output prices and increasing input prices are the primary drivers.”⁵ Nevertheless, because property taxes are based on land values rather than income levels, farms earning less income from agriculture tend to pay disproportionately more in property taxes than those with greater farm income. Farms with smaller landholdings also tend to pay more than their fair share in property taxes.⁶

Selected Farm Real Estate Statistics, Sullivan County & Comparison Areas, 2012					
	Sullivan	Orange	Ulster	Delaware	Statewide
Number of farms	321	658	486	704	35,537
Acres per farm	168	134	147	207	202
Property value of farms – total (000s)	\$198,345	\$487,464	\$359,074	\$362,871	\$ 18,677,798
Property value per farm	\$617,897	\$740,827	\$738,835	\$515,442	\$525,587
Property value per acre	\$3,683	\$5,537	\$5,042	\$2,492	\$2,600
Real property taxes per farm	\$6,421	\$9,568	\$7,981	\$4,716	\$5,877
Real property taxes per acre	\$38.27	\$71.52	\$54.46	\$22.80	\$29.07
Property taxes per \$1,000 valuation	\$10.39	\$12.92	\$10.80	\$9.15	\$11.18
Average market value of ag. products sold	\$84,424	\$153,035	\$115,019	\$67,735	\$152,380
Average income from farm-related sources*	\$23,766	\$38,773	\$21,459	\$11,578	\$18,061
Average income from government payments	\$4,722	\$10,962	\$6,688	\$5,965	\$7,955
Average gross farm income**	\$112,912	\$202,770	\$143,166	\$85,278	\$178,396
Taxes as a % of gross farm income	5.7%	4.7%	5.6%	5.5%	3.3%

⁴ Note: There are differences in the calculation methods used to determine property taxes paid in the Agricultural Census (this section) vs. County assessment records (used in the previous section). The Ag Census numbers used in this portion of the analysis are dependent upon self-reporting by the farm operators.

⁵ Thomas G. Allen and Kevin J. Boyle, *Farm Property Taxes in Maine*, Maine Agricultural and Forest Experiment Station Miscellaneous Report 418, University of Maine, Orono, ME, March 2000, p. 21.

⁶ Timothy W. Kelsey and Jayson K. Harper, *Real Property Taxes and Farm Income in Pennsylvania*, Penn State College of Agricultural Sciences, Agricultural Research and Cooperative Extension, 2001 ; and Gene Wunderlich and John Blackledge in *Taxing Farmland in the United States*, USDA Economic Research Services, Agricultural Economic Report Number 679, March 1994.

Selected Farm Real Estate Statistics, Sullivan County & Comparison Areas, 2012

	Sullivan	Orange	Ulster	Delaware	Statewide
--	----------	--------	--------	----------	-----------

Source: 2012 Census of Agriculture

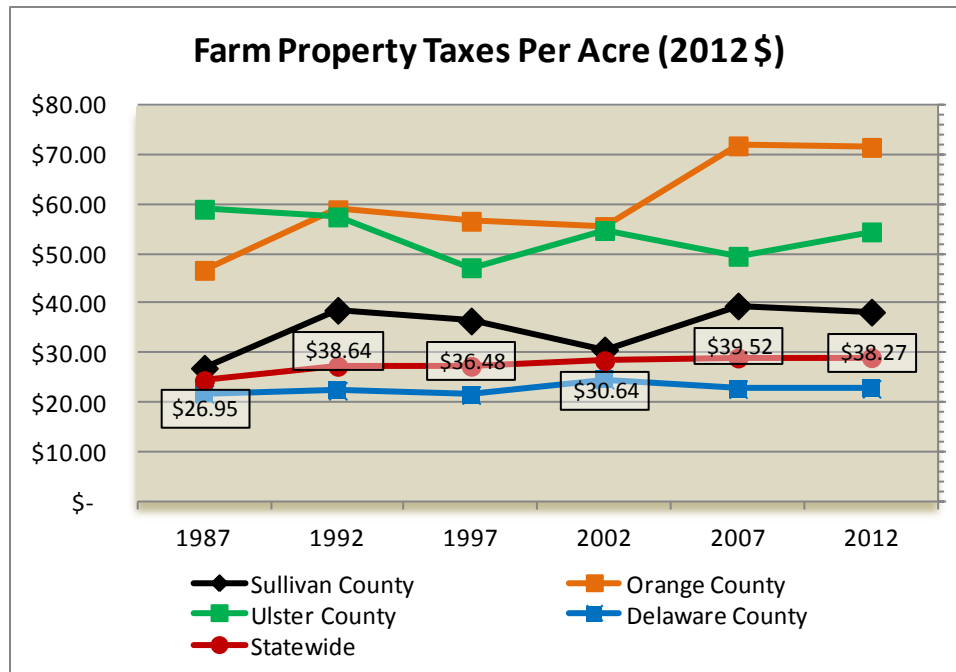
* Income from farm-related sources is gross before taxes and expenses and includes receipts received by farm operators for providing services (e.g., plowing, planting, spraying), rental of farm property, agritourism and recreational services, patronage dividends and refunds from cooperatives, crop and livestock insurance payments, animal boarding, breeding fees, etc.

**Total income from agricultural products sold, farm-related sources, and government payments.

Real Property Taxes Per Acre

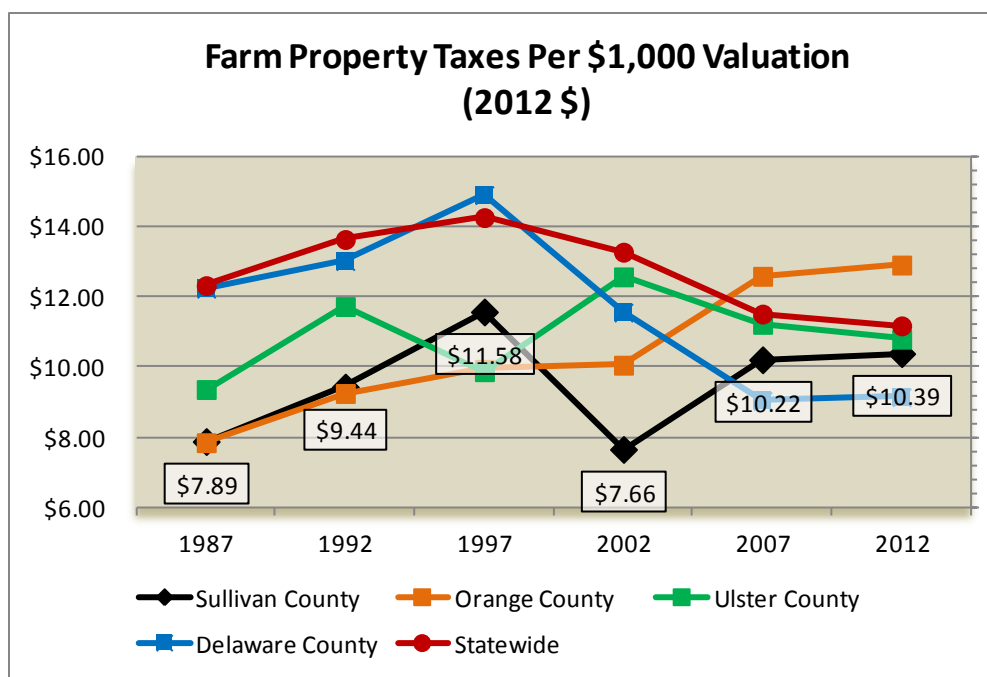
In 2012, property taxes on a per-acre basis averaged \$38.27 in Sullivan County. This is higher than the statewide average, but lower than in both Orange and Ulster Counties, where the averages were \$71.52 and \$54.46, respectively. This is largely due to the higher land values in the Hudson Valley, as confirmed by the average property *value* per-acre.

The chart below shows property taxes per acre, in constant 2012 dollars, from 1987 to 2012. In Sullivan County, farm property taxes on a per acre basis, when adjusted for inflation, increased 42.0% over the 25-year period. The increase statewide was only 18.9%. As noted above, however, property taxes depend on the value of the land being taxed and are not fixed rates per acre. In Orange County, property taxes per acre increased 53.1%.



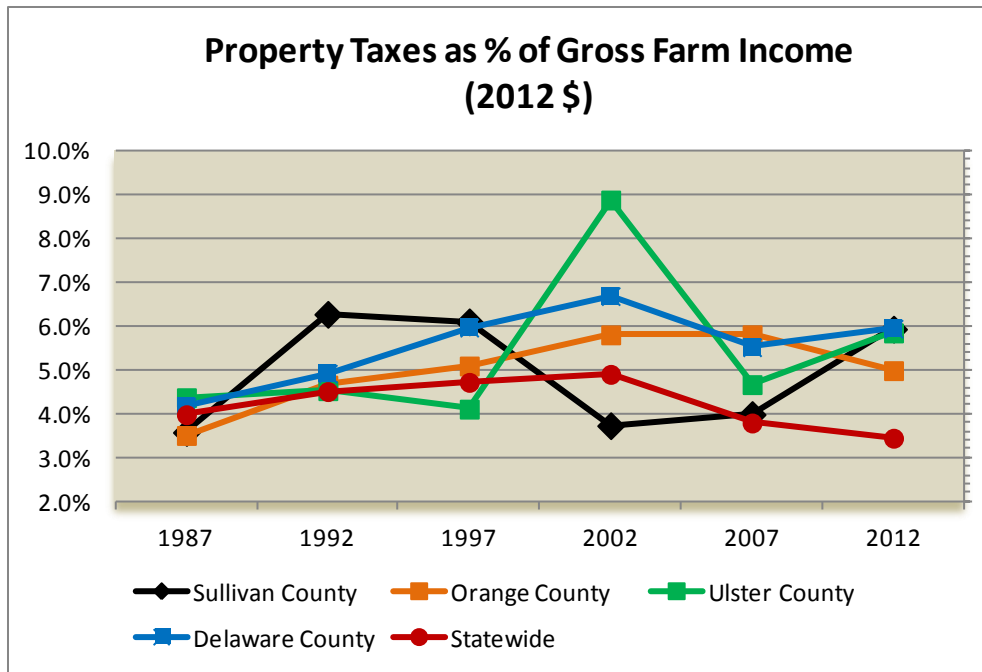
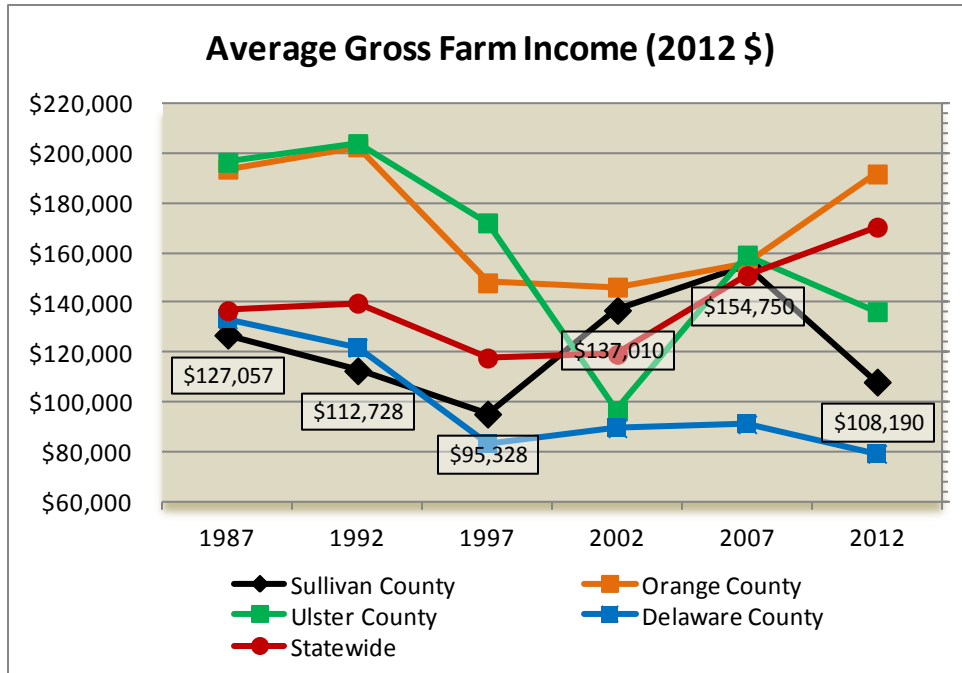
Property Taxes Per \$1,000

When the information is converted into property taxes per \$1,000 valuation, a slightly different picture emerges. Essentially, this measure adjusts for differences in the market value of farm property. The average rate of taxation for farms in Sullivan County is now \$10.39 per \$1,000, lower than the state average of \$11.18 but comparable to the average in Ulster County (\$10.80). The chart below shows property taxes per \$1,000 valuation, in constant 2012 dollars, in all comparison areas between 1987 and 2012.



Taxes As A Percentage of Gross Farm Income

Average gross farm income combines the market value of agricultural products sold with other income from farm-related sources, such as custom farm work and rental of farm land, and government payments. As shown in the chart below, farms in Sullivan County had an average gross income of \$112,912 in 2012, which included \$84,424 from sales, \$23,766 from farm-related sources, and \$4,722 from government payments.



In 2012, real property taxes paid per farm represented 5.7% of average gross farm income in Sullivan County and 5.6% in neighboring Ulster County. Notably, the property taxes per farm in all four counties comprised a higher share of gross farm income than in the state as a whole.

It is worth noting that the income calculations do not include other sources of farm household income, such as jobs off the farm. If off-farm sources of income were included, the percentage of total farm household income going to real property taxes would be lower.

Real Property Taxes Versus Other Production Expenses

In Sullivan County, real property taxes in Sullivan County accounted for 7.6% of total production expenses on farms with \$10,000 or more in annual sales in 2012. Feed for animals was the largest single production expense, accounting for more than a third of total farm expenses. Other significant expenses included hired labor (11.6%), the purchase of poultry and livestock (9.2%), repair and maintenance (6.8%), and petroleum products (5.2%).

The table below reflects the production expenses of Sullivan County farms in the aggregate, but may obscure differences in the cost structures exhibited by types of farms, as well as changes over time in the characteristics of farms operating in the County.

Total Farm Production Expenses in Constant 2012 Dollars, Sullivan County					
	2012		1987		% Change, 1987-2012
	Number	Percent	Number	Percent	
Agricultural Chemicals	\$522,000	1.9%	\$206,061	0.5%	153.3%
Energy - Electricity	\$881,000	3.2%	\$1,276,768	3.2%	-31.0%
Energy - Petroleum Products	\$1,408,000	5.2%	\$1,052,525	2.6%	33.8%
Feed	\$9,345,000	34.3%	\$15,268,687	38.3%	-38.8%
Fertilizer	\$367,000	1.3%	\$565,657	1.4%	-35.1%
Labor - Contract	\$143,000	0.5%	\$252,525	0.6%	-43.4%
Labor - Hired	\$3,147,000	11.6%	\$2,840,404	7.1%	10.8%
Livestock and Poultry	\$2,519,000	9.2%	\$8,529,293	21.4%	-70.5%
Property Taxes	\$2,061,000	7.6%	\$1,696,970	4.3%	21.5%
Seeds, Bulbs, Plants, & Trees	\$245,000	0.9%	\$163,636	0.4%	49.7%
Supplies, Repairs, & Maintenance	\$1,847,000	6.8%	\$1,874,747	4.7%	-1.5%
Other	\$4,761,000	17.5%	\$6,103,030	15.3%	-22.0%
TOTAL	\$27,246,000	100.0%	\$39,830,303	100.0%	-31.6%

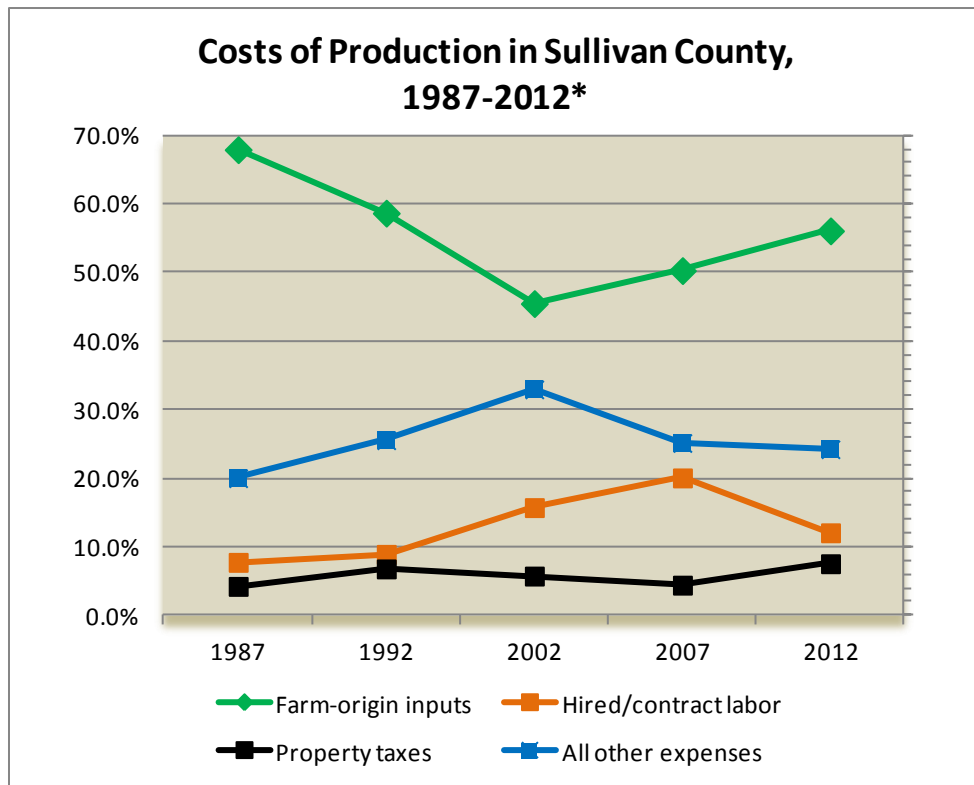
Source: 2012 & 1987 Census of Agriculture

Growth in Real Property Taxes Versus Other Production Expenses

Between 1987 and 2012, farm property taxes in Sullivan County, in constant 2012 dollars, increased 21.5%. Farm inputs such as agricultural chemicals (153.3%), seeds, plants, and trees (49.7%), and petroleum products (33.8%) rose far more dramatically.

Relative to other farm costs, property taxes have remained a relatively stable proportion of total production expenses in Sullivan County over the last 25 years. Farm-origin inputs – the purchase of

feed, seed, livestock, and energy – as well as hired and contract labor have experienced much more volatility.



*1997 is not included due to undisclosed data in some categories.

Cost of Community Services Studies

A Cost of Community Services (COCS) study is a tool used to assess the net fiscal contribution of current local land uses. It provides a snapshot of costs versus revenues based on existing land use patterns. Since the 1980s, COCS studies have been used to inexpensively and reliably measure the contribution of agricultural lands to the local tax base.

COCS studies involve five basic steps: defining the scope of the project and identifying land use categories to study (typically residential, commercial/industrial, and farmland/open space); collecting data on local revenues and expenditures; allocating revenues by land use category; allocating expenditures by land use; and computing revenue-to-expenditure ratios for each land use category. The studies rely on recent financial records and extensive interviews with local officials and service providers to determine how revenues were generated and how appropriations were spent.

According to the American Farmland Trust, at least 150 COCS studies have been conducted in the United States since the mid-1980s. COCS analyses have been conducted in at least 26 states including New

York, Connecticut, New Jersey, and Pennsylvania. The findings of COCS studies have been remarkably consistent.

An important result of the COCS studies is the *positive fiscal impact* of farm and forest lands and open space on communities. Although agricultural lands generate less revenue overall than residential, commercial or industrial properties, they have modest requirements for public services, providing a fiscal surplus to offset the shortfall in revenues for residential services. In fact, even after preferential tax treatment is taken into account, working farms generate more revenue through property taxes than they receive back in services.

A summary of COCS studies by the American Farmland Trust⁷ calculated the median cost per dollar of revenue raised to provide public services to each of the three different land uses. For every dollar these communities received from residential uses, the median amount the communities had to expend to service them was \$1.16. In contrast, for every dollar received from commercial/industrial uses and from farm/forest/open space uses, the median amount they had to expend was \$0.29 and \$0.35 respectively.

A COCS study was prepared by Sullivan County in 2006. The findings underscored the importance of mixed land uses with equal attention to fostering commercial development and preserving farmland and open space. The data revealed that the ratio of residential expenditures to revenues was greater than one for all the towns in the county. In contrast, agricultural land uses were shown to have a positive fiscal impact; for every dollar in taxes received from farms, it cost each of the Sullivan County towns between \$0.34 and \$0.55 to provide services.

⁷ American Farmland Trust, Farmland Information Center. *Fact Sheet: Cost of Community Services Studies*. August 2010.

Appendix F: Highlights of Surveys and Farmer Focus Group

Public Survey Highlights

- 262 responses
- Q1 - 85% positive perception of agriculture vs. 11% negative
- Q2 - 98% say agriculture and farmland is important to them
- Q5 – 41% say agriculture is a critical part of the local and regional economy
- Q6 – 98% are either *somewhat* or *very* concerned about the loss of farmland in Sullivan County
- Q7 - Freshness (71%) and locally grown (66%) are the two most important criteria used when deciding on food purchases
- Q8 - 91% are willing, to some extent, to pay more for local agricultural products; 41% are willing even if the price is significantly higher.
- Q9 - Vegetables, eggs, fruits, honey, and seasonal items are the most popular local products
- Q11 - The most popular farmer’s market (for these responses) is the Callicoon Creek Park outdoor market (55%), followed by the Liberty Visitors Association market (20%)
- Q12 - Food items respondents would buy locally if available:
 - More dairy/milk products, meat and fish, cured and smoked meats and fish, breads/flour/grains, ginseng, mushrooms, bison, organic meats, game, winter greens and root veggies, pre-packaged meals, fruits, pasta sauces, cheeses, bedding plants, dog food, real bagels, pastrami, chicken, kosher meat, lamb.
 - Many said “anything,” and cheese/yogurt/dairy products were very popular, as were meat and meat products.
- Q13 and Q14 - More felt agriculture is a topic of concern to other residents (76%) than it is a topic of importance to their local government (56%)
- Q18 - 81% either *somewhat* or *strongly* favor reductions in property taxes to farmers if the farmer keeps their land in agricultural production
- Q19 – 30-32% of respondents were unfamiliar with PDR, TDR and LDR programs, but generally felt all the other strategies mentioned would be very beneficial
- Q22 and Q25 - 10% own land that is used by a farmer, but 42% are willing to consider leasing their land to a farmer
- Q26 - 42% have some interest in a community garden
- Other notes and comments - Hydrofracking, while not asked about at all in the survey, came up repeatedly in many of the comment sections
- We have 88 names and 90 email addresses of people interested in following updates to the plan.

Municipal Officials Survey

- 6 responses
- Q1 – 5 Town Supervisors, 1 Planning Board Chair
- Q2 – Mamakating (3), Cochection (1), Bethel (1), Callicoon (1)
- Q3 and Q4 – Only 1 said farms and farm related businesses are not important to the town’s local economy (Mamakating Planning Board Chair)
- Q5 – 83% (including Mamakating PB Chair) think agriculture contributes to the local economy by bringing in tourists and visitors
- Q6 and Q7 – All feel it is desirable to have agriculture-related businesses in their town, and feel they have an appropriate location for one
- Q12 – Only 25% said they allow agricultural use of preserved open spaces
- Q14 – All 3 from Mamakating said yes, they would like to be considered for the review
- Q15 – 100% yes to providing incentive financing
- Q19 – 3 felt residents have a very high interest (ranked as 5) in supporting agriculture, 1 ranked it as a 3
- Q20 and 21 – One supervisor feels there is a problem with the way Agricultural Districts are granted by the County

Farmer Survey

- 69 responses
- Q1 – 49 names given
- Q3 – Average number of years farming in Sullivan County = 35 (range: between 0 and 144 years)
- Q4 – Acreage farmed: average 104 acres owned, and 147 acres rented from someone else
- Q5 – 20% do not have internet access for their business; 10% have internet access, but do not use it; 23% have a website, and 23% have a Facebook page
- Q7 – 35% sell direct to consumers from a farm stand; 13% sell direct to restaurants
- Q8 – 11% are interested in expanding into new markets, while 40% say they are unsure
- Q10 – 58% do not advertise at all; of those who do, most appear to produce their own materials and website
- Q11 and Q13 – 81% do not participate in any farmers’ markets, and 52% do not want to
- Q14 – 62% say direct sales to consumers are a significant source of income
- Q15 and 16 – 76% do not have any value-added enterprises on the farm, and 70% do not intend to add any
- Q20 – 62% think their town needs to do more to preserve and promote agriculture
- Q21 – 27% use some form of renewable/alternative energy source
- Q22 – Property taxes (53%) and fuel costs (50%) were the most often cited issues facing farm operations
- Q23 – Most often cited immediate business needs: 1) Finding new ways to reduce costs (31%), 2) Better prices for products (27%), 3) Processing facility for livestock (27%)

- 4 respondents have participated in the County low interest loan program, while 17 (27%) were not aware of the program
- Q26 – 55% plan on using the Liberty Red Meat facility
- Q28 – 61% plan on using the regional food hub
- Q32 – 79% were not interested in expanding into any of the value added dairy products listed
- Q33 – Educational or technical assistance: 55% smokehouse or meat processing, 52% hops and malting barley, 35% high value berries, 29% high-tunnel or hoop houses
- Q34 – 22% were unaware of Farmstock, 36% were unaware of the Eat Kitchen
- Q37 – 50 names to be included in future announcements

Farmers’ Focus Group

The Sullivan County Agricultural and Farmland Protection Plan committee held a farmers’ focus group session on March 20, 2014. Approximately 40 farmers participated in the event, held at the Cornell Cooperative Extension office on Ferndale-Loomis Road, Liberty.

Vision/Goals

During the session, participants were asked to develop a list of words or phrases that could be used to describe a future state of agriculture in Sullivan County. These phrases will be used to further develop a vision statement for the plan, describing what agriculture in Sullivan County will look like 10 to 20 years from now.

- Financially healthy
- Agriculture is a priority
- Diverse
- Available for the future
- Open communication
- Transparency
- Stability
- Educated community
- Valued by the community
- Opportunities for young farmers
- Even playing field with big agri-business
- Emphasis on local products staying local
- Positive image of agriculture

Issues

Participants were first asked about the issues facing farmers and agriculture in Sullivan County. The list was developed in an open forum, with everyone present given an opportunity to speak. At the end of

the session, participants were given four stickers, and asked to vote for the issue most important to them, or viewed as most important to the county. The issues are listed here, with the number of votes received preceding each issue identified. Bolded issues are those that received at least one vote.

- **15 - Property taxes**
- **10 - Need more support from the county**
- **10 - Not enough help for new/young farmers**
- **7 - Lack of leadership – no cheerleader**
- **7 - Lack of confidence in government officials**
- **6 – Lack of affordable farmland**
- **5 - Finances/capital for young farmers**
- **4 - Food Safety Act requirements – very restrictive**
- **3 - Little clout with government officials**
- **2 - Agricultural assessments**
- **2 - Productive land is going fallow, needs to be reuse of these lands**
- **2 - Nuisance wildlife – deer, eagles, coyotes**
- **2 - Lack of funding mechanisms for the projects we want**
- **1 - Crop insurance requirements**
- **1 – Lack of marketing**
- **1 - Transition from dairy to another agricultural use**
- Reliance on leased land
- Lack of respect/knowledge of farmers needs, lack of political clout, lack of hope and confidence
- The big advertisers focus on products, not the process – contributes to lack of knowledge about farms
- Farmers are too busy to act on the situation
- Need more networking
- Need more accessibility to website to sell and market products
- Regulations too restrictive
- Transition to value-added is difficult
- Eagle’s nest restrictions
- Animal activists
- Non-farmer conflicts
- Little use of value-added operations
- Lack of clear definition of farmland

Strategies

After the issues were identified, participants were asked to discuss possible solutions to these issues. Using the same open forum, strategies to address the issues were identified, listed, and voted on. The

strategies are listed here, with the number of votes received preceding each strategy identified. Bolded strategies are those that received at least one vote.

- **22 - Marketing consultant/advisor - help with marketing, Identifying niche markets; branding**
- **13 - Startup money for young farmers**
- **9 - Additional property tax relief**
- **7 - Financial advisor for farmers**
- **7 - Need a leader/driving force at the county – education and leadership**
- **5 - Advertisements that promote farm operations, not just products**
- **4 - County agricultural website**
- **4 - Rotating part-time labor force program**
- **3 - Take advantage of the urban market for hay**
- **3 - Education in agriculture/training at SUNY Sullivan Community College – work with new products and entrepreneurs; more communication between college and farmers**
- **3 - Innovative funding mechanisms – other than grant applications**
- **2 - Link farmers to unused land**
- **1 - Assistance for value-added equipment**
- **1 - Facilitate networking opportunities**
- **1 - Bring in experts and businesses in value-added**
- **1 - Collective New York City Green Markets program**
- Artisanal cheese processing
- Additional processing facilities
- Form a communications channel with the local college
- Identify niche markets that are available and how farmers can meet that niche
- Red Meat facility – need to include or at least evaluate need for butchering, marketing, packaging

Appendix G: Detailed SWOT Analysis

This SWOT Analysis summarizes the strengths, weaknesses, opportunities, and threats for agriculture in Sullivan County. It is based on past plans and studies, Agricultural Census data, interviews and focus groups, survey results, the property tax study, zoning audits, and input received from the Agricultural Advisory Committee and the Agricultural and Farmland Protection Board as part of the planning process.

Note: 1) Items marked with an asterisk (*) are from the County's original 1999 Agricultural & Farmland Protection Plan. 2) Numbers in parentheses are the "votes" identifying the item as a high-priority issue at the farmers' focus group meeting on March 20, 2014.

STRENGTHS to maintain

Internal resources and capabilities affecting agriculture in Sullivan County

Overall

- Access to the largest market in the nation*
- Diversity among farm operations
- Diversity among types of crops and products grown/raised in Sullivan County
- Evolving, vital, growing agricultural sector
- Sullivan County more affordable for farming than counties to the east

Public Support⁸

- Agriculture "very important" to some residents
- Positive public perception of agriculture by some in Sullivan County
- Support for local products and interest in purchasing more
- County support for agriculture as evidenced by support for CCE, SWCD, development of this plan, etc.

Markets and Marketing

- Brand already exists – Pure Catskills operation is successful, well known
- Direct sales as an increasingly important source of income for farmers
- Growing network of farmers markets
- Growth and success of Callicoon Farmers Market
- Halal market
- Hasidic Jews part of Sullivan County visitor market
- Interest is growing among farmers for expanding into new markets and diversifying
- Watershed Agricultural Council and "Pure Catskills" initiative

⁸ Based on results of the public survey.

Agritourism

- SCVA efforts to promote agriculture/agritourism
- Interest among visitors from the NYC metro market – don't mind driving long distances
- Some agritourism venues and events in place

Organizations

- Agricultural Advisory Committee vehicle to bring different groups together
- Recognition of the importance of farming as evidenced in local comprehensive plans
- Sullivan County IDA – involvement with RBOG grants, red meat facility, etc.
- Sullivan County Farm Network
- SUNY Sullivan – interest in supporting agriculture and food-related entrepreneurship as part of its strategic plan

Infrastructure

- Critical mass, including 2 major feed mills and a farm machinery dealer*
- Existing and potential processing facilities, including the red meat facility
- Existing food distribution systems are in place such as Lucky Dog, Good Eggs, Fresh Direct, Riveria
- Food hub initiatives starting
- Infrastructure network*
- Interstate access - conversion of NYS Route 17 to I-86
- Internet is used by many farmers for more than email – for marketing and direct sales

Farms and Farmers

- Farms pursuing plans to market higher priced organic, “farm fresh,” and/or Kosher milk
- Foie gras production
- Increase in smaller niche and diversified farms
- Increase in horse inventory
- Increased use of value added products and there is interest among farmers for doing more
- Interested and committed landowners that want to protect their family lands
- Interest among some farmers in expanding or diversifying their farm operations
- Concentration of poultry and egg farms
- New farms emerging – 13 farm operators have been on present farm less than 2 years (2012 Agricultural Census)
- New, small specialty beverage companies - distilleries, breweries, a cidery
- On-the-farm cheese-making activity at small dairy farms
- Several large egg producers that sell under various labels
- Stability in total number of farms and farmland acreage based on latest Agricultural Census

Economic Development

- Access to local, state, and federal dollars for agriculture/agri-business, including County revolving loan funds
- Manufacturing sector in the County is dominated by food manufacturing (especially poultry, egg, and dairy-related operations)
- Positive fiscal contribution made by agriculture (cost of community services study)

Resources

- Soils and climate*
- Quality of soils and high concentration of active farms in Agricultural District #1
- Land available to market to new farmers

Support

- Tax incentives*
- Strong culinary arts programs (SCCC, BOCES, and Job Corps)

WEAKNESSES to address

Internal deficiencies in resources and capabilities affecting agriculture in Sullivan County

Overall

- Disjointed efforts – many activities, not much coordination/communication between groups and organizations
- Underdeveloped agricultural sector
- Need to educate locals about how food is grown, importance of buying locally, role agriculture plays in County
- No Spanish language marketing to Latino residents, which in 2010 made up 14% of Sullivan County's population

Farms and Farmers

- 91% of County's agricultural output is in dairy products, beef cattle, poultry and eggs, and horses... concern about long-term sustainability of agricultural sector given declining sales in the first three categories
- Aging farming community and lack of young farmers
- Dairy farms that lack a business/farm succession plan > at risk of ceasing operations
- Declining livestock inventories, with the exception of horses
- Difficulty in transferring farms from one generation to the next
- Few CSAs (9 in 2012)
- Few farmers under age 35
- Fewer beef farms, fewer poultry and egg farms

- Inadequate value-added processing services to support agricultural sector
- Lack of affordable farmland (6)
- Lack of large areas of prime soils
- Lack of help and capital to encourage young, new farmers (10)
- Lack of succession planning
- Land is sometimes more valuable to sell than to farm
- Land going fallow – lack of agricultural reuse of good lands (2)
- Limited quantity of products / not a constant supply
- Limited use of value added operations
- Limited vegetable production – only 140 acres harvested; vegetable farms average <5 acres
- Loss of next generation farmers
- Low average sales among crop farms
- Most farms do not generate significant income from the sale of agricultural products and depend on off-farm employment or other income
- Most sales come from a relatively small number of farms
- Mostly small to mid-sized farms in Sullivan County with limited sales, especially outside the dairy/livestock sector
- Question of whether existing farms can scale up, provide consistency, and produce high-quality products for the NYC market
- Relatively small (but growing) number of vegetable farms compared to other Hudson Valley counties
- Reliance on rented land to support many farms introduces instability long-term
- Steady and continued decline in traditional dairy and livestock farms
- Support for farmers – resources may be there, but farmers don't have easy access or knowledge of who/what/where
- Unclear how many farms will use the new red meat processing facility or what other businesses will be needed to support it (e.g., smokehouses)
- Value of land is too great to encourage farm succession
- Very limited organic production

Capital and Costs

- Access to capital to fund farm operations (2); lack of capital for farms, especially for buying land and starting a new farm
- Agricultural assessments, especially on buildings unfair (2)
- Economic viability an issue for most farms in the County
- Fuel costs
- High cost of obtaining land
- High percentage of tax-exempt property places a burden on other landowners
- High production expenses
- Job creation requirements of agri-business loan funds in Sullivan County – a barrier to participation
- Lack of awareness of the existing loan fund programs and other programs already available

- Lack of capital for expansion
- Lack of funds and programming for preservation of farmland
- Low profitability*
- Property taxes (15) - tax burden threatens the viability of smaller farms
- Rising cost of feed, utilities, and transportation > impacts farm profitability

Markets and Marketing

- Advertisers focus on products, not on the process, so as a consequence, people don't understand agriculture
- Lack of coordination in marketing efforts— bring together farmers, consumers, restaurants, distributors, and others in an integrated system
- Lack of marketing (1)
- Lack of marketing guidance and expertise
- Many farmers don't advertise, don't have a website or use Facebook, etc.
- Mixed success of farmers markets; need to fine-tune locations and scheduling
- Need more accessibility to website to sell and market products – need more networking
- Not enough emphasis on keeping food grown locally here in Sullivan County – don't look at NYC markets and ignore local markets

Labor

- Lack of farm worker housing
- Lack of trained labor*

Business Planning

- Lack of business planning and business maintenance assistance for farmers

Perceptions and Attitudes

- Conflicts with non-farmers and summer visitors and residents
- Farmers are highly independent, making it a challenge to organize cooperatively to respond to opportunities
- Farmers too busy to be proactive or act on situation
- Farmers too busy to expand or get involved with direct sales, value-added or other options
- Lack of clear definition of farmland and “agriculture”
- Lack of communication, collaboration, coordination among agencies and organizations involved in agriculture and helping farmers
- Lack of confidence in government officials and structures to address needs (7)
- Lack of leadership, no cheerleader for agriculture (7); little clout with government officials (3)
- Negative attitudes keep the farm community from being more successful
- No formal outreach or programs to attract new farmers
- Poor public understanding of agriculture*

- Realtors missing from discussion of attracting new farmers – lack understanding of agriculture

Regulations and Requirements

- Crop insurance requirements (1)
- Food Safety Act requirements – very restrictive (4)
- Many municipalities with farm- unfriendly local land use regulations that can place barriers to starting or expanding farms
- Regulatory hurdles facing farmers and businesses wishing to transition or transfer
- Rules, regulations and fees related to participating in farmers markets are seen as a barrier to more participation by many farmers

Public Policy

- Lack of funding for agricultural land protection
- Lack of resources to implement farm to school and farm to business programs
- Lack of support by Towns to preserve and promote farming
- Limited state/federal/local dollars to satisfy the need of willing landowners in selling development rights
- More information on available funding and financing opportunities
- Need more support from county (10)
- According to public survey, lack of support for agriculture by County government
- Limited Farm-to-School activities

Development Pressure

- Desirability of area for second homes keeps prices high and influences development of new homes and businesses
- Nuisance wildlife – deer, eagles, coyotes; eagles nest restrictions
- Planning Board and ZBA's don't give enough attention to a project's impact on agriculture when going through the site plan, subdivision, or zoning process

Infrastructure

- Challenge of distribution for busy farmers
- Difficulty getting fresh produce to low-income residents
- Distance to travel to farmers market is seen as a barrier
- Lack of high speed internet in all locations of the county
- Lack of key support facilities (e.g., slaughterhouses)*
- Lack of transportation to getting produce to a farmers market is seen as a barrier
- Lack of water/sewer infrastructure along prime commercial highway corridors
- Need for infrastructure, distribution, branding, and farmer education to take advantage of current production and marketing trends

OPPORTUNITIES to capitalize on

Potential initiatives and factors that can impact agriculture in a positive way

Agritourism

- Agritourism component of tourism is small but growing – agritourism income from 9 farms, \$170,000 in 2007 to 15 farms, \$300,000 in 2012
- Allow for off-farm signs to direct traffic to farm stands
- Farm-based tourism*
- Farmstock
- Lodging is an area that could collaborate and tie into agritourism
- More farmers markets
- SCVA

Financial and Technical Assistance

- Existing ag-business revolving loan funds
- Farm-friendly and user-friendly loan and grant funds to allow access to capital
- Financial and business planning skills
- HVADC
- More direct on-farm assistance from CCE
- Need funding to make land affordable for farmers
- Need to explore more direct funding for farming – most farmers lease land and could lose it; need to find ways to purchase development rights
- New legislation at federal and state levels to assist small farms
- Provide technical assistance related to value-added skills
- Start-up funding for young farmers
- Small business division within the Planning Department to take lead

Institutional and Wholesale Markets

- Development of new food hub
- Getting local farm products into local schools
- Growth of casinos and large hotels could support agriculture
- Institutional markets (e.g., schools, prisons, hospitals) for local agricultural products
- Potential interest by Formaggio Cheese in using local milk supplies IF consistency, scale, and quality can be addressed – currently purchase from northern NJ

New Farmers / Land Acquisition

- Community gardens can be helpful to introduce people to farming
- Link farmers to unused or underutilized land
- Need for experienced farmers to mentor new/young farmers
- Mentor program

- New farmer recruitment and training
- Use of Glynwood Center business model, which allows beginning farmers to lease a small plot of land from an experienced farmer
- Land access programs, especially to new farmers
- Land that can be leased to young/new/beginning farmers
- Put vacant land back into agricultural production
- Start-up funding for young farmers

Public Education

- Education of non-farmers about the nature and character of farm operations, to increase public support for farming
- Need to educate people on why they should eat local
- Promotion and education to help non-farmers understand the role of agriculture
- Promotion of farmers and farms
- Tie agricultural initiatives to health of the County – use agriculture to improve our health status

Value-Added and Specialty Food Products / Niche Farming

- Adding value to agricultural products*
- Commercial kitchen could add value and take advantage of new markets
- Creative and new interest in niche farming
- Development of the new commercial kitchen at CCE – will allow people to develop value-added products while educating the community about healthy foods
- Development of dairy processing capacity
- Expand red meat facilities to encompass selling and processing (sausage, smoking)
- Farm to table co-packers
- Hops and distillery, malt/barley expansion
- New markets for a variety of high value-added products including artisanal cheese, wines, craft brews, etc.
- Niche products and markets can be identified*
- Processing of egg and dairy products, especially small dairy and kosher dairy
- Red meat processing facility – approved and funded
- Red meat processing facility can generate other value-added for butchering, packaging, transporting, etc.
- Smokehouse and meat processing
- Sullivan County branding of local farm products
- Vegetable growing as primary agricultural effort
- Year-round farming opportunities (hoop houses)

Specific Markets and Growth Trends

- Access to NYC markets

- Exploding farm-to-table, “buy local” and wellness movements
- Grow into the Pike County, PA market
- Growing Latino market, both in Sullivan County and the NYC metro area
- Interest in local and organically grown products
- Interest in natural, hormone-free, and pasture-raised livestock
- Large kosher market within 50 miles, but kosher food is being trucked in from PA
- Kosher dairy products

Marketing and Promotion

- Direct marketing opportunities
- Direct marketing*
- Marketing for a variety of audiences
- Social media marketing opportunities
- Watershed Agricultural Council initiatives

Public Policy

- Floodplain management to decrease flood damage
- Incentives for farmers to retain their property in active agricultural use
- Reduce land use law barriers to agriculture
- Reduce property taxes
- Right to farm laws should be passed in all locations
- Local zoning updates to remove barriers to farm activities

Other

- Broadband access throughout county
- Create central organization/alliance to get agencies and organizations to work together more
- Delaware River should be leveraged as an asset
- Negotiated pricing for agricultural products and services*
- Proposed Healthy World Institute and new agriculture program at SCCC
- SUNY Sullivan – more ties and programs oriented to agriculture; looking to increase green/sustainability efforts
- Use renewable energies to reduce costs, solarize Sullivan

THREATS to watch

External issues that could negatively influence progress

- Competition for farmland (and conversion to non-agricultural uses)*
- Competition from neighboring counties for share of NYC metro market - for example, Orange County farms produce far more fruits and vegetables that can be sold downstate
- Competition from other U.S. and foreign markets*
- Continued decline in the number of dairy farms
- Continued loss of market share in poultry and egg production statewide
- Dairy industry consolidation
- Development pressure*
- Food supplied to retail stores, restaurants, schools, and institutions in NYC comes from a relatively small number of sources
- Hydrofracking – an issue that came up repeatedly in the public survey – potential threat to farmland and agricultural production
- Loss of critical mass*
- Nutrient management*
- Negative attitudes among some farmers about the future of agriculture
- Volatile milk prices

Appendix H: Farm Friendly Audits

Comprehensive plans and zoning regulations in 4 towns - Cohecton, Fallsburg, Rockland, and Mamakating - were reviewed for their “farm-friendliness.” The results of the audits are summarized below.⁹

Overall – Observations of Comprehensive Plans Related to Agriculture

1. All of the towns address agriculture in some way in their comprehensive plans. They also all involved public input that included public perceptions about the role agriculture plays in their community. Public comment showed a high level of support for agriculture, and all plans consider agriculture as having an important role. The level of importance is also shown by discussion of agriculture as part of a vision statement or goals. Three towns had at least one goal that included promotion or maintenance of agriculture. Mamakating did not have a specific goal related to agriculture.
2. Similarly, all except Mamakating established at least general policies to promote agriculture. Mamakating and Cohecton did not translate any general discussion into specific actions or strategies that could be implemented to improve farming land uses. Overall, while agriculture is a recognized land use having an important role in these communities, the plans were not particularly strong about establishing future planning tasks to address it.
3. Only two of the plans include data, maps and specific information in their resource sections showing the current state of agriculture. Only Cohecton recognized the County Agricultural and Farmland Protection Plan and the NYS Agricultural Districts in their community.
4. Overall, Fallsburg’s plan addressed agriculture in the most comprehensive way, followed by Cohecton and Rockland. Mamakating’s plan recognized it, but did not do a particularly good job addressing the needs of agriculture.
5. Strategies that can be advocated by the County to local towns to improve the local planning for agriculture include:
 - Provide maps of prime farmland soils, soils of statewide importance, and agricultural districts to the community when they are writing or updating a plan.
 - Provide other data from the Agricultural Census, U.S. Census, and other sources to provide them with a snapshot of the quantity (acres, farms, parcels, volume) of agricultural activities taking place in the community.
 - Provide sample goals related to promoting and strengthening agriculture that they could consider.
 - Provide training and informational materials to towns to show the benefits of agriculture in the community.

⁹ Similar audits were conducted for the Towns of Bethel, Callicoon, Delaware, and Liberty as part of the development of municipal farmland protection plans in 2008. The remaining towns were not audited because there is little to no farming taking place there.

Overall – Observations of Zoning Regulations Related to Agriculture

1. In most respects, the zoning laws reviewed do not reflect each community's stated role of agriculture from their comprehensive plans. Overall, some aspects of the zoning laws reviewed placed "farm-unfriendly" barriers to farming activities. Even in towns where agriculture had a strong component in the Plan (such as Fallsburg), the zoning did not reflect those same values. In using the farm-friendly criteria (attached), the zoning laws in Cohecton and Rockland met more of them (54% and 50%, respectively) than those in Fallsburg and Mamakating (about 29% in both). This means that it may be very difficult for new farms to start in those locations, or for existing farms to expand, diversify, or add value-added products or direct sales that would make their farm businesses more successful.
2. None of the zoning laws reviewed included protection of farmland or promotion of agricultural land as a stated purpose of the zoning law.
3. All communities do allow at least some form of agriculture as a permitted use in some parts of the Town. However, they all defined agriculture differently. But farming is a permitted use in their districts slated for agriculture or rural residential uses. While it is not uncommon for towns to prohibit agriculture from hamlets, mixed use areas, and business districts, it is not considered farm-friendly to limit agriculture in low density rural residential districts. Two towns do prohibit agriculture from some of their rural, non-hamlet or business districts.
4. All four towns require special use permits for some agricultural operations. Operations perceived as having more impact (lots of animals usually) require special use permits. For example, in Fallsburg, livestock farms over 100 animals need a special use permit even in their Agricultural District. NYS DAM guidance views requiring special use permits or full site plan review as potentially overly restrictive for farms located in an Agricultural District. Use of those review processes for typical agricultural operations is not a farm-friendly practice. There is recognition, however, that some review may be necessary and in those cases, a modified agriculturally-oriented site plan review is beneficial.
5. Cohecton has a zoning district to promote agriculture as does Mamakating. But in Mamakating, there are still quite severe restrictions on agricultural activities.
6. These days, many farms require growing, processing and selling of their products as part of their farm businesses. As such, they often have multiple businesses on the farm property and a farm friendly zoning law would allow for this. None of the zoning reviewed actually clearly articulated whether multiple uses on one farm were allowed or not, although in some it could be inferred that these other uses might be accessory uses to the farm. In Fallsburg, for instance, they allow temporary farm stands as a home occupation on a farm. The message is that this is a gray area and the laws could be strengthened by clarifying and expanding allowance for this type of farm operation. Zoning would be strengthened to promote farming if it were outlined exactly how multiple aspects of farming, farm processing, and farm selling are handled. All allow for signs to be used for farm stands.
7. In one form or another, all allow for farm stands and all but Mamakating allow for them without significant review processes through site plan or special use permits.
8. Some amount of farm processing is allowed through the zoning, but not slaughterhouses.

9. Fallsburg requires buffers between farms and non-farm uses, but they require the farmer to provide for that buffer. That is not how it is recommended to work unless the farm moves in after the residence is in place. None of the other communities require buffers.
10. All allow for clustering or conservation subdivision that results in preservation of open space. However, these are oriented to preserving undeveloped or unused open spaces, rather than for active agriculture.
11. None of the towns ask for any information about agriculture on their site plan or special use permit applications. That means that the Planning Board has no information about agricultural uses, soils, districts, or other nearby agricultural activities that they would need to pay attention to. This is especially important when a project is reviewed that is in or within 500 feet of a NY agricultural district and leaves the Board without good information upon which to determine if there are any impacts to agriculture.
12. Both Cohecton and Rockland use the NYS AML 25-AA Agricultural Data Statement, but Fallsburg and Mamakating do not. None require use of the agriculture disclosure notice.
13. Similarly, none have any development guidelines that serve to direct development to the least productive portions of a parcel.
14. Overall, agriculture-related definitions are not good. The basic ones are there, but in general, they are limiting, not flexible, and usually have an acreage requirement attached to them in order to be considered a farm. This is inconsistent with NYS DAM guidance and could be considered overly restrictive.
15. Silos and other farm buildings are semi-exempt from height requirements except in Mamakating. However, the height restrictions are only up to a point – structures over 120' are not exempt.
16. Only Cohecton has a section on personal wind mills and solar panels. The others do not mention these new land uses. None discuss that wind mills and solar panels used to power a farm are considered part of that farm operation. The state does recognize that some review through a modified site plan process would be appropriate though.
17. All the towns have acreage restrictions on farms and farm operations, and all limit the number of animals that can be farmed in some way or another. These are oriented to livestock, swine and caged poultry. All had minimum lot sizes that would need to be met for types of farms, along with road frontage and setback requirements and quite restrictive lot coverage rules.

Farm-Friendly Criteria Used in the Review

Comprehensive Plans

- Does the plan have a section on agriculture?
- Does the plan include maps of agricultural lands, important farmland soils, agricultural districts, etc?
- Was there public input that explored the role of agriculture in the community? I.e. did a survey include questions about agriculture? Was there anything in workshops about it?
- Does the vision statement or goals address agriculture in any way? Is there any visible demonstration of the value of agriculture to the community in the plan?
- Does the plan consider agriculture as an important resource in Town?
- Does the plan recognize or reference a local or County agricultural and farmland protection plan?
- Does the plan include any data on farms and farmland? Acreage? Income or occupations from farming or other demographic data?
- Does the plan establish policies towards farmland and farming?
- Does it identify the value of farmland and farms to the community?
- Does it offer any recommended actions related to farming or farmland or ways to preserve or enhance farming?
- Does the plan establish a policy and/or future actions for the agricultural use of open space that may be created in a conservation subdivision or clustering?
- Does the plan discuss NYS Agricultural Districts and how the town can be supportive of that?
- Does it consider farmland a natural resource and encourage easements or other protections of that land? Is there a policy discussed for PDR, LDR or TDR?
- Is agriculture a consideration of where growth does or does not take place?

Regulations (Zoning)

- Does the regulation's purpose statement include a discussion of agriculture, or promoting or preserving agriculture specifically?
- Does zoning allow agriculture as a permitted use by right in any district?
- Zoning not prohibit agriculture in any district other than hamlet centers or commercial areas?
- No special use permits for agriculture or agriculture-related uses in any district?
- No higher density or commercial growth in core farm areas or where a NYS Agricultural District exists?
- Does the zoning establish a local agricultural zoning district, agricultural overlay district, or special use district for agriculture?
- Does the zoning allow farms to have more than one business or offer flexibility to accommodate the needs of agricultural businesses?
- Are buffer zones between farmland and residential uses required for new construction or subdivision?
- Are innovative development patterns that preserve farmland encouraged, allowed, or mandated (conservation subdivision, clustering, TDR)?
- Are off-site or on-site signs allowed to attract and direct people to farm stands?
- Are farm stands, farm retail markets, agritourism businesses, breweries, etc. allowed?
- Are farm processing facilities such as community kitchens, slaughterhouse, etc. allowed?
- Farm stands are not limited to selling just products from that one farm?
- Farm stands do not need a site plan review or special use permit?

- Does zoning allow for accessory uses such as greenhouses, barns, garages, equipment storage etc permitted as of right?
- Do application requirements include asking for submittal of information or maps about farming that might be taking place on or near the project parcel? Whether it is in an Agricultural District? What farming activities take place on or near the site? Whether prime farmland soils are present?
- Do standards exist that require the PB or ZBA to evaluate impacts of a project on agriculture?
- Do any design standards exist to direct building envelopes to areas on a parcel that would still allow farming to occur on remaining open spaces?
- Does the regulation define agriculture, agricultural structure, farm worker housing, agritourism, agri-business?
- Are farm-related definitions broad and flexible and not confined to a certain number of acres or income earned?
- Are non-traditional or retail based farm businesses allowed in a district or agricultural zoned district. For example, can a farmer set up a brewery on site and sell products onsite?
- Is an agricultural data statement as per AML 25-AA required as part of an application for site plan, subdivision, special use or other zoning?
- Does the community require placement of an agriculture disclosure statement on plans or plats when development takes place in a NY certified Agricultural District?
- No agriculture-related uses required to get a special use permit or go through site plan review?
- Does the regulation define and allow for farm worker housing? Are mobile homes allowed as farm worker housing?
- Are silos and other farm structures exempt from height requirements?
- Are personal wind mills and solar panels allowed for farms? With permits or permitted as of right?
- Zoning does not regulate farms by acreage or number of animals

Appendix I: Model Right-to-Farm Law

Be it enacted by the Town Board of the Town of _____ as follows:

Section 1. Legislative Intent and Purpose

The Town Board recognizes farming is an essential enterprise and an important industry which enhances the economic base, natural environment and quality of life in the Town of _____. The Town Board further declares that it shall be the policy of this Town to encourage agriculture and foster understanding by all residents of the necessary day to day operations involved in farming so as to encourage cooperation with those practices.

It is the general purpose and intent of this law to maintain and preserve the rural traditions and character of the Town, to permit the continuation of agricultural practices, to protect the existence and operation of farms, to encourage the initiation and expansion of farms and agri-businesses, and to promote new ways to resolve disputes concerning agricultural practices and farm operations. In order to maintain a viable farming economy in the Town of _____, it is necessary to limit the circumstances under which farming may be deemed to be nuisance and to allow agricultural practices inherent to and necessary for the business of farming to proceed and be undertaken free of unreasonable and unwarranted interference or restriction.

Section 2. Definitions

1. "Farmland" shall mean land used in agricultural production, as defined in subdivision four of section 301 of Article 25AA of the State Agriculture and Markets Law.
2. "Farmer" shall mean any person, organization, entity, association, partnership, limited liability company, or corporation engaged in the business of agriculture, whether for profit or otherwise, including the cultivation of land, the raising of crops, or the raising of livestock.
3. "Agricultural products" shall mean those products as defined in section 301(2) of Article 25AA of the State Agriculture and Markets Law, including but not limited to:
 - a. Field crops, including corn, wheat, rye, barley, hay, potatoes and dry beans.
 - b. Fruits, including apples, peaches, grapes, cherries and berries.
 - c. Vegetables, including tomatoes, snap beans, cabbage, carrots, beets and onions.
 - d. Horticultural specialties, including nursery stock, ornamental shrubs, ornamental trees and flowers.
 - e. Livestock and livestock products, including cattle, sheep, hogs, goats, horses, poultry, llamas, ratites, such as ostriches, emus, rheas and kiwis, farmed deer, farmed buffalo, fur bearing animals, milk and milk products, eggs, furs, and poultry products.
 - f. Maple sap and sugar products.
 - g. Christmas trees derived from a managed Christmas tree operation whether dug for transplanting or cut from the stump.
 - h. Aquaculture products, including fish, fish products, water plants and shellfish.

- i. Short rotation woody crops raised for bioenergy.
- j. Production and sale of woodland products, including but not limited to logs, lumber, posts and firewood.

4. "Agricultural practices" shall mean those practices necessary for the on-farm production, preparation and marketing of agricultural commodities. Examples of such practices include, but are not limited to, operation of farm equipment, proper use of agricultural chemicals and other crop production methods, and construction and use of farm structures.

5. "Farm operation" shall be defined in section 301 (11) in the State Agriculture and Markets Law.

Section 3. Right-to-Farm Declaration

Farmers, as well as those employed, retained, or otherwise authorized to act on behalf of farmers, may lawfully engage in agricultural practices within this Town at all times and all such locations as are reasonably necessary to conduct the business of agriculture. For any agricultural practice, in determining the reasonableness of the time, place, and methodology of such practice, due weight and consideration shall be given to both traditional customs and procedures in the farming industry as well as to advances resulting from increased knowledge, research and improved technologies.

Agricultural practices conducted on farmland shall not be found to be a public or private nuisance if such agricultural practices are:

1. Reasonable and necessary to the particular farm or farm operation,
2. Conducted in a manner which is not negligent or reckless,
3. Conducted in conformity with generally accepted and sound agricultural practices,
4. Conducted in conformity with all local state, and federal laws and regulations,
5. Conducted in a manner which does not constitute a threat to public health and safety or cause injury to health or safety of any person, and
6. Conducted in a manner which does not reasonably obstruct the free passage or use of navigable waters or public roadways.

Nothing in this local law shall be construed to prohibit an aggrieved party from recovering from damages for bodily injury or wrongful death due to a failure to follow sound agricultural practice, as outlined in this section.

Section 4. Notification of Real Estate Buyers

In order to promote harmony between farmers and their neighbors, the Town requires land holders and/or their agents and assigns to comply with Section 310 of Article 25-AA of the State Agriculture and Markets Law and provide notice to prospective purchasers and occupants as follows: "It is the policy of this state and this community to conserve, protect and encourage the development and improvement of agricultural land for the production of food, and other products and also for its natural and ecological value. This notice is to inform prospective residents that the property they are about to acquire lies partially or wholly within an agricultural district and that farming activities occur within the district. Such farming activities may include, but not be limited to, activities that cause noise, dust and

odors." This notice shall be provided to prospective purchase of property within an agricultural district or on property with boundaries within 500 feet of a farm operation located in an agricultural district.

A copy of this notice shall be included by the seller or seller's agent as an addendum to the purchase and sale contract at the time an offer to purchase is made.

Section 5. Resolution of Disputes

1. Should any controversy arise regarding any inconveniences or discomfort occasioned by agricultural operations which cannot be settled by direct negotiation between the parties involved, either party may submit the controversy to a dispute resolution committee as set forth below in an attempt to resolve the matter prior to the filing of any court action and prior to a request for a determination by the Commission or Agriculture and Markets about whether the practice in question is sound pursuant to Section 308 of Article 25AA of the State Agriculture and Markets Law.

2. Any controversy between the parties shall be submitted to the committee within thirty (30) days of the last date of occurrence of the particular activity giving rise to the controversy or the date the party became aware of the occurrence.

3. The committee shall be composed of three (3) members from the Town selected by the Town Board, as the need arises, including one representative from the farm community, one person from Town government and one person mutually agreed upon by both parties involved in the dispute.

4. The effectiveness of the committee as a forum for the resolution of disputes is dependent upon full discussion and complete presentation of all pertinent facts concerning the dispute in order to eliminate any misunderstandings. The parties are encouraged to cooperate in the exchange of pertinent information concerning the controversy.

5. The controversy shall be presented to the committee by written request of one of the parties within the time limits specified. Therefore after, the committee may investigate the facts of the controversy but must, within twenty-five (25) days, hold a meeting at a mutually agreed place and time to consider the merits of the matter and within five (5) days of the meeting render a written decision to the parties. At the time of the meeting, both parties shall have an opportunity to present what each consider to be pertinent facts. No party bringing a complaint to the committee for settlement or resolution may be represented by counsel unless the opposing party is also represented by counsel. The time limits provided in this subsection for action by the committee may be extended upon the written stipulation of all parties in the dispute.

6. Any reasonable costs associated with the function of the committee process shall be borne by the participants.

Section 6. Severability Clause

If any part of this local law is for any reason held to be unconstitutional or invalid, such decision shall not affect the remainder of this Local Law. The Town hereby declares that it would have passed this local

law and each section and subsection thereof, irrespective of the fact that any one or more of these sections, subsections, sentences, clauses or phrases may be declared unconstitutional or invalid.

Section 7. Precedence

This Local Law and its provisions are in addition to all other applicable laws, rules and regulations.

Section 8. Effective Date

This Local Law shall be effective immediately upon filing with the New York State Secretary of State.

Appendix J: Model Farm-Friendly Regulatory Tools

Farm-Friendly Zoning Practices

There are many land use regulatory tools that a community can use to support local farms. See the **Agriculture and Local Plans and Regulations** chapter of this plan for more information about the current state of farm-friendliness of some towns in Sullivan County. That section discusses the areas that could be strengthened to improve farm opportunities. A sample Right-to-Farm Law model is also included in Appendix I.

Another excellent resource to understand farm-friendly zoning tools is the “Planning for Agriculture in New York: A Toolkit for Towns and Counties,” by the American Farmland Trust, 2011. This guidebook is available on the American Farmland Trust website at <http://newyork.farmland.org/publications>.

Zoning improvements would enhance farm opportunities in Sullivan County towns include:

- Improve definitions of farming and agriculture related terms.
- Ensure that promotion of agriculture and farmland protection are included in the purpose statements of the land use regulation. This will ensure the intent of the town to support farms.
- Allow for the use of mobile homes for farm employees
- Allow for additional farm uses in rural and low density residential districts
- Allow for on-site retail and other value-added processing of products grown on the farm.
- Allow for additional farm-related uses, perhaps as a special use permit.
- Require placement of a buffer, or additional setback on non-farm uses when they are proposed adjacent to active farm operations.
- Do not limit farm stands only to sale of produce raised on that farm – allow for multiple farmers to cooperate and pool their products in a retail operation.
- Revise zoning and subdivision application submissions to require agriculture related information such as if the parcel is in an agricultural district, has active farm operations on or nearby the site, and whether any prime farmland soils or soils of statewide significance are on the site. Ensure that the Planning Board evaluates impacts of a proposed project on surrounding farms.
- Require use of an agricultural data statement as per AML 25-AA. A sample of this is in this Appendix.
- Fully exempt farm structures from height requirements.
- Remove barriers to barn or other farm structure placement such as large front or side setbacks. Establishing setbacks that force farm structures to be located in specific areas on a parcel can limit the type of farm operation that can take place.
- Remove prohibitions to the kinds of farm animals a farm may have and do not limit the number of farm animals allowed per farm or per acre.
- Remove from regulations or definitions the requirement that a farm has to have a certain number of acres in order to be considered a farm.

Other specific tools that should be considered include:

Lot size and density averaging – Many communities use a two to five acre minimum lot size. This reduces the density of new development but does little to protect farmland because the lots are often too big to mow and too small to farm. These lot sizes consume all the land base and can actually accelerate land conversion. Minimum lot sizes at 20 or more acres can be effective at preserving farmland because that is a common size of a farmed parcel in the area. However, this lot size is not often acceptable to landowners. Density averaging identifies the desired density but does not set a minimum lot size beyond what is required by Department of Health. Density averaging allows a variety of lot sizes provided the total number of lots does not exceed the specified density. For example, if a desired density is one residence per 10 acres, a 100 acre parcel could have 10 houses. Using a minimum lot size, the entire parcel would be split into ten 10-acre parcels. Using density averaging, the same parcel could yield nine 2-acre parcels and 1 82 acre parcel. In this example, the number of lots created is the same as the allowable density, but instead of using the entire parcel, a large amount of land could be useable as farmland.

Agricultural overlay district – Overlay districts are established to protect certain natural or cultural resources. Many historic districts are overlay districts for example. Agricultural overlay districts can be applied to areas with highly productive soils, where there are continued agricultural uses, or when the parcel is located in a certain area. Within that overlay district, uses may be restricted to low density residential or agriculture and agricultural-related uses. Lands in overlay districts may also have other development guidelines such as changes in density or setbacks that are designed to promote agriculture and limit adverse impacts of new development on adjacent farms.

Requirement of clustering or conservation subdivisions for major subdivisions – Clustering concentrates new houses in locations on a parcel such as woods or less productive soils while keeping lands suitable for active farming available. This technique accommodates development and preservation of productive lands. A conservation also preserves open space and farmland, but does not necessarily result in a clustered subdivision. Both techniques can be mandatory or voluntary and are usually applied to major subdivisions.

Incentive Zoning – is authorized by New York State Town Law 261-b. Incentives are usually in the form of a density bonus (more houses or buildings are allowed) in return for developers providing assets that advance specific physical, social, or cultural policies. Density bonuses can be offered for provision of preserved farmland when a development takes place.

Model Disclosure Notice

"It is the policy of this state and this community to conserve, protect and encourage the development and improvement of agricultural land for the production of food, and other products, and also for its natural and ecological value. This disclosure notice is to inform prospective residents that the property they are about to acquire lies partially or wholly within an agricultural district and that farming activities occur within the district. Such farming activities may include, but not be limited to, activities that cause noise, dust and odors. Prospective residents are also informed that the location of property within an agricultural district may impact the ability to access water and/or sewer services for such property under certain circumstances. Prospective purchasers are urged to contact the New York State Department of Agriculture and Markets to obtain additional information or clarification regarding their rights and obligations under article 25-AA of the Agriculture and Markets Law."

Model Agricultural Data Statement

Instructions: This form must be completed for any application for a special use permit, site plan approval, use variance or a subdivision approval requiring municipal review that would occur on property within 500 feet of a farm operation located in a NYS Agriculture and Markets certified Agricultural District. County Planning Board review is also required. A copy of this Agricultural Data Statement must be submitted along with the referral to the _____ County Planning Department.

1. Name and Address of Applicant: _____

2. Type of application (Check one or more):

Special Use Permit Site Plan Approval Use Variance Subdivision approval

3. Description of proposed project to include (1) size of parcel or acreage to be acquired and tax map identification number of tax parcel(s) involved; (2) the type of action (single-family dwelling or subdivision, multi-family development, apartment, commercial or industrial, school, non-residential use, etc., and (3) project density (Please provide this information on the reverse side of this application and attach additional description as necessary).

4. Is this parcel within an Agricultural District? Yes No

5. If Yes, what is the Agricultural District Number? _____

6. Is this parcel actively farmed? Yes No

7. List all farm operations within 500 feet of your parcel. Attach additional sheets if necessary.

- A. Name: _____
 Address and Telephone #: _____
 Type of Farm: _____
 Is this parcel actively farmed? Yes No
- B. Name: _____
 Address and Telephone #: _____
 Type of Farm: _____
 Is this parcel actively farmed? Yes No
- C. Name: _____
 Address and Telephone #: _____
 Type of Farm: _____
 Is this parcel actively farmed? Yes No
- D. Name: _____
 Address and Telephone #: _____
 Type of Farm: _____
 Is this parcel actively farmed? Yes No

8. Signature of Applicant: _____

9. Reviewed by: _____

Date: _____

Draft Scope of Work for a Local Agricultural Committee

Purposes

The purpose of the Agricultural Advisory Committee is twofold: first, to advise the Town Board, Planning Board and other Town agencies on matters pertaining to the preservation, promotion, and ongoing operation of agricultural activity in the Town of _____; and second, to implement, or guide the implementation of, the recommended actions in the plan. Of particular importance are 1) help educate non-farmers; 2) promote and market local agricultural products and services; 3) offer regulatory guidance to the Town Board or Planning Board related to agriculture; 4) promote the economic viability of farming; 5) to assist in conflict resolution; and 7) assist farmers by serving as the agricultural navigator to goods, services, and agencies working on behalf of agriculture in the Town.

Committee; Personnel; Appointment; Organization.

There is hereby established in the Town of _____ a permanent committee to be known and designated as the "Town of _____ Agricultural Advisory Committee" which shall consist of five (5) residents of the Town of _____ who are engaged in farming, agri-business, or a vocation related

to agriculture; and two (2) residents of the Town of _____ who shall serve as ex-officio members, one of whom shall be a Town Board member and one who shall be a Planning Board member. Ex-officio members shall only be eligible to serve on the committee while they hold the other cited Town office. The members of the said committee first appointed shall serve for terms as follows: two (2) appointees for three (3) year terms; two (2) appointees for four (4) year terms and one (1) appointee for a five (5) year term. Thereafter, all appointments shall be for terms of five (5) years and vacancies shall be filled for the unexpired term only. The members shall serve until their respective successors are appointed. The members of the committee shall receive no compensation for their services.

The committee shall select from among its members a chairperson and such other officers as it may deem necessary and establish rules of order to conduct their business. The Agricultural Advisory Committee shall report to the Town Board at least annually setting forth and detailing the activities and operations of the committee during the preceding year.

Committee Assistance and Funding.

The Agricultural Advisory Committee may request technical assistance and/or specialized advise from any resource it may deem appropriate, including but not limited to other local residents; other Town of _____ officials; Sullivan County Planning; County Cooperative Extension; County Soil and Water Conservation; Sullivan County Agricultural and Farmland Protection Board; NY Farmland Trust and NYS Agriculture and Markets. However, no contracts for payment for services or other expenditure of Town funds may be entered into by the Committee.

As a citizen advisory committee, the Agricultural Advisory Committee may not authorize any expenditure of Town funds. Funds necessary for proper committee operation may be requested by the committee from the Town Board and, in accordance with customary procedures, the Town Board may authorize such funds and approve the expenditure thereof.

Responsibilities of Committee. The responsibilities of the committee shall be as follows:

1. To recommend methods, review proposals, and develop proposals and strategies for the implementation of the agricultural goals of the Town of _____, and report their findings to the Town Board. This includes, but is not limited to communication with local farmers, interact with other government agencies, facilitate local presentation of educational programs, to encourage and assist applications to farmland preservation programs, to encourage appropriate farmland protection activities, to study and comment on government proposals that may have an impact on local farms and to write and administer grant applications when approved by the Town Board.
2. To, from time to time, work with the Town to amend and update local plans and laws as needed to reflect the needs of agriculture and refer such updates and amendments to the Town Board.

3. To identify methods whereby the Town Board, County or State governments can encourage existing farmers to continue in active agricultural operation.
4. To, when requested by the Town Board or other agencies engaged in an environmental review of proposed private or public development projects and/or infrastructure projects, provide input regarding the impacts on agriculture of such projects.
5. To recommend to the Town Board, Town Planning Board and/or other agencies techniques that will help preserve large, contiguous and economically viable tracts of agricultural land.
6. To recommend to the Town Board reasonable and desirable changes to this listing of responsibilities or to accomplish any other tasks referred to it by the Town Board or other local agencies having to do with agricultural related activities.

Model Modified Site Plan Review from Department of Agriculture and Markets¹⁰

Site Plan Review for Farm Operations within a New York State Agricultural District

Many local governments share the Department's view that farm operations should not have to undergo site plan review and exempt farms from that requirement. However, the Department recognizes the desire of some local governments to have an opportunity to review farm operations and projects within their borders, as well as the need of farmers for an efficient, economical, and predictable process. In view of both interests, the Department developed a model streamlined site plan review process which attempts to respond to the farmers' concerns while ensuring the ability to have local land use issues examined. The process could be used to examine a parcel's current characteristics and its surroundings in relation to any proposed activities on the farm and their potential impact to neighboring properties and the community. For example, municipalities could specify that farm operations located within specific zoning districts must submit to site plan review. Municipalities may also elect to exempt farm operations, located within a county adopted, State certified agricultural district, from their site plan review process.

The authorizing statutes for requiring site plan review are quite broad and under "home rule" municipalities retain significant flexibility in crafting specialized procedures (e.g., the selection of a reviewing board; uses which trigger submission of site plans; whether to have a public hearing and the length of time to review an application). Town Law §274-a and Village Law §7-725-a define a site plan as "a rendering, drawing, or sketch prepared to specifications and containing necessary elements as set

¹⁰ From publication entitled *Guidelines for Review of Local Zoning and Planning Laws* developed by the New York State Department of Agriculture and Markets, 1/26/10

forth in the applicable zoning ordinance or local law which shows the arrangement, layout and design of the proposed use of a single parcel of land. ." These sections of law further outline a list of potential site plan elements including parking, means of access, screening, signs, landscaping, architectural features, location and dimensions of buildings, adjacent land uses and physical features meant to protect adjacent land uses as well as additional elements.

Many municipalities have also added optional phases to the site plan review. While a preliminary conference, preliminary site plan review and public hearings may assist the applicant earlier in the review process and provide the public an opportunity to respond to a project, they can result in a costly delay for the farmer.

For the sake of simplicity, the model site plan process and the following guidance presume that the planning board is the reviewing authority.

Site Plan Process

The applicant for site plan review and approval shall submit the following:

1. Sketch of the parcel on a location map (e.g., tax map) showing boundaries and dimensions of the parcel of land involved and identifying contiguous properties and any known easements or rights-of-way and roadways.
- 2) Show the existing features of the site including land and water areas, water or sewer systems and the approximate location of all existing structures on or immediately adjacent to the site.
- 3) Show the proposed location and arrangement of buildings and uses on the site, including means of ingress and egress, parking and circulation of traffic. Show the proposed location and arrangement of specific land uses, such as pasture, crop fields, woodland, livestock containment areas, or manure storage/manure composting sites.
- 4) Sketch of any proposed building, structure or sign, including exterior dimensions and elevations of front, side and rear views. Include copies of any available blueprints, plans or drawings.
- 5) Provide a description of the farm operation (existing and/or proposed) and a narrative of the intended use and/or location of proposed buildings, structures or signs, including any anticipated changes in the existing topography and natural features of the parcel to accommodate the changes. Include the name and address of the applicant and any professional advisors. If the applicant is not the owner of the property, provide authorization of the owner.

6) If any new structures are going to be located adjacent to a stream or wetland provide a copy of the floodplain map and wetland map that corresponds with the boundaries of the property.

7) Application form and fee (if required).

If the municipality issues a permit for the structure, the Code Enforcement Officer (CEO) determines if the structures are subject to and comply with the local building code or New York State Uniform Fire Prevention and Building Code prior to issuing the permit. Similarly, the Zoning Enforcement Officer (or the CEO in certain municipalities) would ensure compliance with applicable zoning provisions.

The Department urges local governments to take into account the size and nature of the particular agricultural activity, including the construction of farm buildings/structures when setting and administering any site plan requirements for farm operations. The review process, as outlined above, should generally not require professional assistance (e.g., architects, engineers or surveyors) to complete or review and should be completed relatively quickly.² The Department understands, however, that in some cases, a public hearing and/or a more detailed review of the project which may include submission of a survey, architectural or engineering drawings or plans, etc., may be necessary. The degree of regulation that may be considered unreasonably restrictive depends on the nature of the proposed activities, the size and complexity of the proposed agricultural activity and/or the construction of buildings or structures and whether a State agricultural exemption applies.

Appendix K: Marketing Opportunities for Farmers

Local/Regional

- **Pure Catskills** - <http://www.purecatskills.com>
 - The buy local branding campaign supporting the local food community and working landscapes in the Catskills region is open to any farm-related business within any of the six counties that WAC represents (i.e., does not have to be located in the NYC watershed). Membership is \$35 and can be initiated online. For questions, call 607-865-7090 x217.
 - Offers a membership kit which outlines membership requirements, use of logo, and detailed member benefits that include being part of a known regional identity, listing in the Guide to Catskills Regional Products, a dedicated webpage for your business and affiliation with the Pure Catskills webpage that draws thousands of visitors each month, marketing efforts on your behalf, print advertising in various magazines, special promotions, educational opportunities, and Catskills Food Guide advertising.
- **Pure Catskills Marketplace** – coming in fall 2014; see http://www.nycwatershed.org/ag_pure-catskills-marketplace.html
 - Members of Pure Catskills will be invited to sell their products through this online market.
 - Product and profile pages are free with members paying 15% commission on sales at time of purchase and are responsible for product fulfillment and shipping.
- **Hudson Valley Bounty** – <http://www.hudsonvalleybounty.com>
 - Regional initiative designed to promote local foods and support connections between local agricultural producers and culinary businesses; farmers can join through the website for \$50 per year. For questions, call 518-432-5360 x303.
 - Benefits: Listing in HVB directory, featured on website and in marketing materials, discount for training sessions, discounted price of participation in events, newsletter, Hudson Valley Bounty logo use.

State

- **Pride of New York Program** - <http://www.prideofny.com/PONY/consumer/viewHome.do>
 - NYS Dept of Agriculture & Markets website with information on over 3,000 "Pride Of New York" members and their products. The Pride of New York Program is the State's branding program for the promotion of agricultural products grown, produced or processed in New York State. The Program markets participants and informs consumers about the availability and variety of New York produced products. Contact NYS Dept of Agriculture and Markets at 518-485-0048 to receive information on free registration.
 - Farmers can list their type of business, product, dates the product is available, and whether it is grown or processed in New York State. Benefits include use of the Pride of NY logo and listing on the website.

- **Taste of NY** – <http://taste.ny.gov/>
 - NYS Dept of Agriculture & Markets initiative to boost the sales and heighten profiles of NY-based produced foods and beverages. Taste NY highlights the quality, diversity and economic potential of New York’s food and beverage industry at events, tourism destinations and retail stores throughout the state. Contact NYS Dept of Agriculture and Markets at 518-457-4383 or 457-7229 to receive information on free registration.
 - Participants must be engaged in a business that grows, produces or processes agricultural products in New York State. A food processor’s license and/or a license/permit to sample and sell alcoholic beverages will be required. Some venues may also require Worker’s Compensation and Disability Insurance. Applicants with no outstanding food and beverage related violations and determined to be qualified will be placed on a list of food and beverage purveyors to be contacted for Taste of NY venues.
- **New York Marketmaker** - <http://ny.foodmarketmaker.com/>
 - A national partnership dedicated to the development of a comprehensive interactive and searchable database of food industry marketing and business data. It is a platform that seeks to foster business relationships between producers and consumers of food industry products and services. Farmers can register for free to help others find your business, keep your information updated, and participate in the Buy/Sell Forum. It also includes a blog.
- **Northeast Organic Farming Association of New York** – <http://www.nofany.org/organic-certification/certified-operations-directory>
 - Lists certified organic farm operations. NOFA also offers assistance in becoming a certified organic grower.

National

- **Local Dirt** - <http://localdirt.com>
 - A national website connecting local sellers (farms, farmers markets, cooperatives) with buyers (individuals, businesses, distributors).
- **FarmersWeb** - <http://www.farmersweb.com>
 - An online marketplace connecting buyers with local farms and producers, FarmersWeb helps chefs and purchasing managers order fresh produce, meat, poultry, dairy, and other products from local farms. Buyers can join for free.
 - FarmersWeb sources are coming soon (as of fall 2014). A free listing will be available to simply list farm, farm products and contact information. WebPro will be to sell 1 to 4 products and cost is \$40 per month or 3% of sales. It allows management of inventory, accepting orders, off and online payment, and view reports. There is an option for unlimited products for \$75/month or 3% of sales. Premier Web will be available to producers who have a WebPro account and offers additional services such as sales and marketing assistance from the FarmersWeb team online and offline.
- **List Your Harvest** - <http://www.listyourharvest.com>

- An online marketplace where you can post or browse locally grown or made products currently available in your area; new (spring 2014).
- Contact them and sign up online. Offers unlimited posts that can be searched by location within the state or country, and by category of product. Cost is \$5 per month, \$14 per quarter or \$50 per year.
- **Agrilicious** - <http://www.agrilicious.org>
 - A Washington State-based resource for “all things local food,” across the United States with opportunities for farmers to increase their visibility and make customer and food industry connections; free membership. Contact membership services at 425-873-1216. Farmers can list products to reach customers online. Has a national reach, and also offers sponsorship, marketing promotions, product promotions and licensing opportunities.
- **Local Harvest** - <http://www.localharvest.org>
 - An online market and website connecting “people looking for good food with the farmers who produce it”; lists over 30,000 family farms and farmers’ markets along with stores and restaurants that feature local food. It includes a map and zip code search to find farms by location. Has 15,000 daily visitors and over 3 million visits annually. Farmers can list their farm and farm products for free. When a farmer joins, they create a listing and webpage where you can upload a photo, link to your farm’s webpage, list products sold, and publicize on-farm events. Sign up is online.
- **PickYourOwn.org** - <http://www.pickyourown.org/addmyfarm.htm>
 - One of a series of websites maintained by Benivia, LLC with information on farms in the U.S., Canada, and other countries; basic listings are free. Related URLs include LocalFarmMarkets.org and PumpkinPatchesAndMore.org.