

Survey Analysis of Ohio CAN

Ohio's Local Food Purchase Assistance Cooperative Program

Report Prepared by Dr. Jennifer Olejownik and Dr. Howard Fleeter
January 2025

INTRODUCTION

The purpose of this report is to highlight the main findings from a follow up survey on Local Food Purchase Assistance (LFPA) which has been branded Ohio CAN (Community + Agriculture + Nutrition) in Ohio. The goal of the survey was to understand the perceived impact of the Ohio CAN program on local agricultural businesses. Survey questions were devised with input from Howard Fleeter & Associates, the Ohio Association of Foodbanks, and regional foodbanks to collect data on business demographics, business growth, food safety, employment, food chain supply resiliency, wellness, and future business outlook.

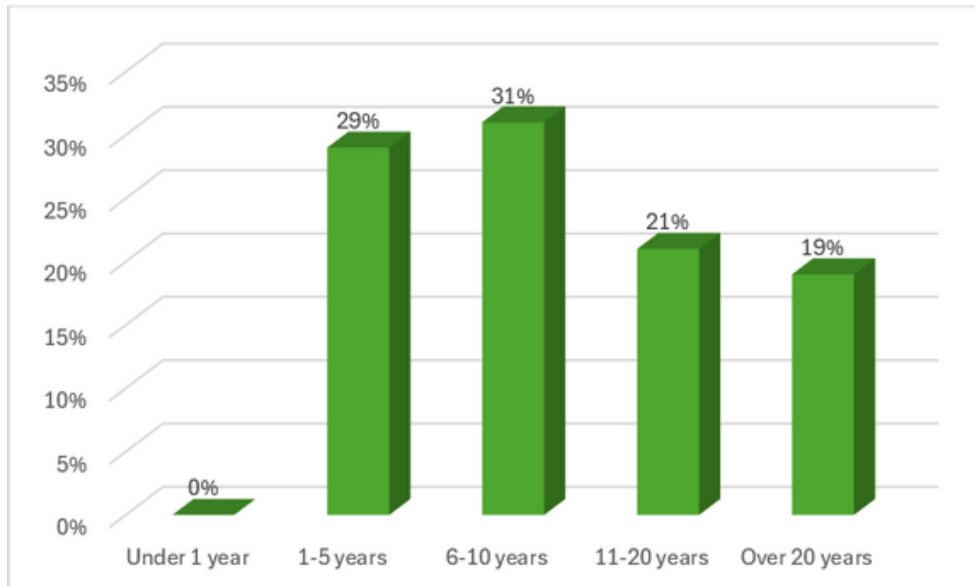
The survey was launched in September 2024 using the Survey Monkey and was initially sent to Ohio CAN participants identified by the Ohio Association of Foodbanks. Email inquiries were later sent to participating aggregators and growers to obtain additional contact information for other known farmers and suppliers who participated in the program. In total, the survey was sent to 82 participants. Several follow-up messages were sent through September and October and overall, 43 participants submitted completed responses, yielding a response rate of 52 percent. Results are summarized and presented below by business demographics, business growth, food safety, and impact of the Ohio CAN program.



I. BUSINESS DEMOGRAPHICS

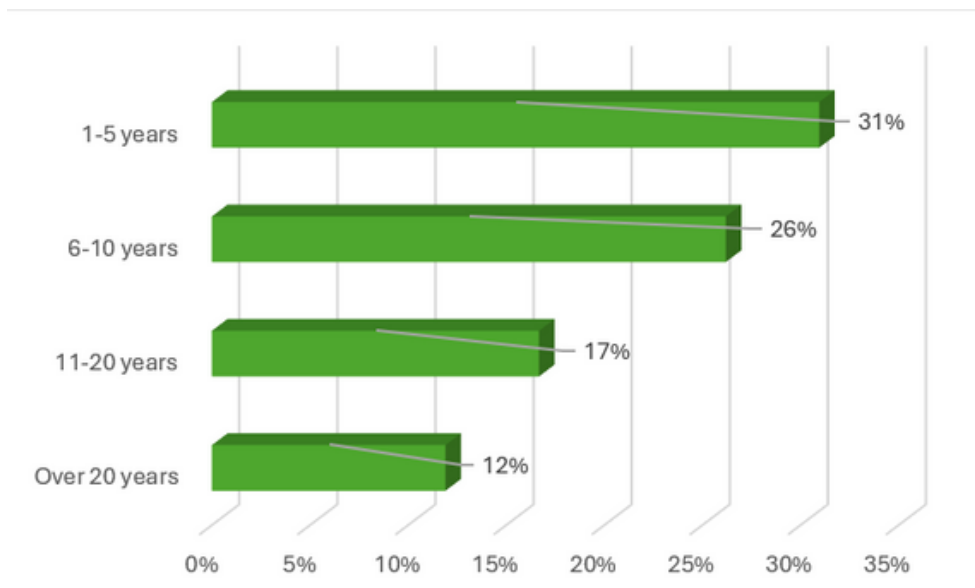
Participants responded to questions about business demographics, products offered, occupational categories and characteristics.

Table 1: Amount of Time in Business by Years



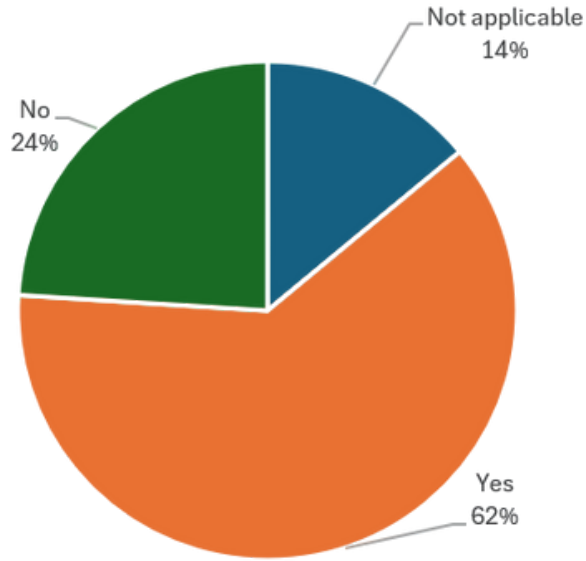
- Twenty-nine percent of all businesses who responded to the survey have been in operation for 1-5 years while 31% have been in operation for 6-10 years.
- Twenty-one percent have been in operation for 11-20 years while another 19% have been in business for over 20 years.

Table 2: Duration of Business Ownership by Years



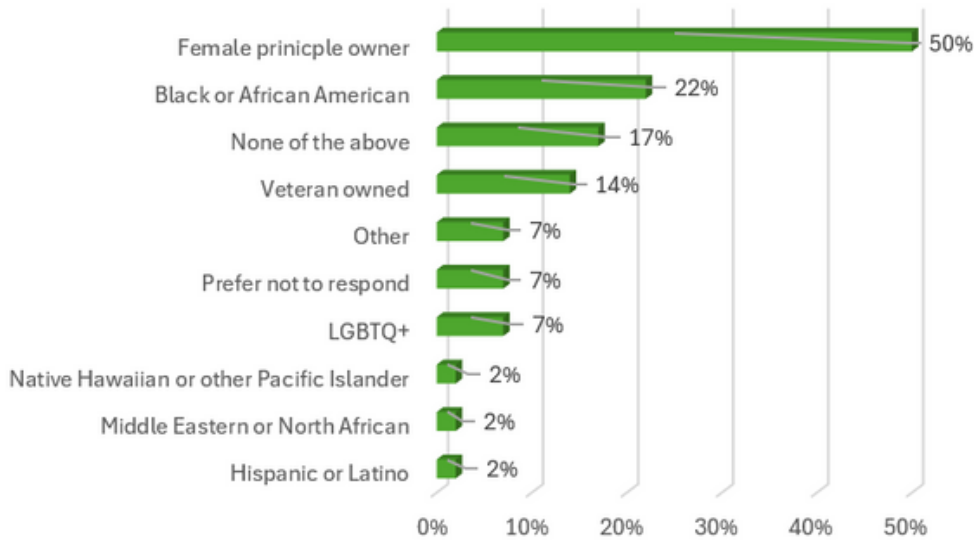
- Thirty-one percent of respondents indicated they have owned their business for 1-5 years and another 26% have owned their business for 6-10 years.
- Only 12% of participants have owned their business for more than 20 years.
- No respondents indicated they had been in operation for less than a year at the time the survey was administered.

Figure 1: Percentage of Participants who Identify as First-Generation Grower or Farmer



- Sixty-two percent of respondents identified as being a first-generation grower or farmer.

Table 3: Percentage of Participants who Identify with Selected USDA Socially Disadvantaged Categories

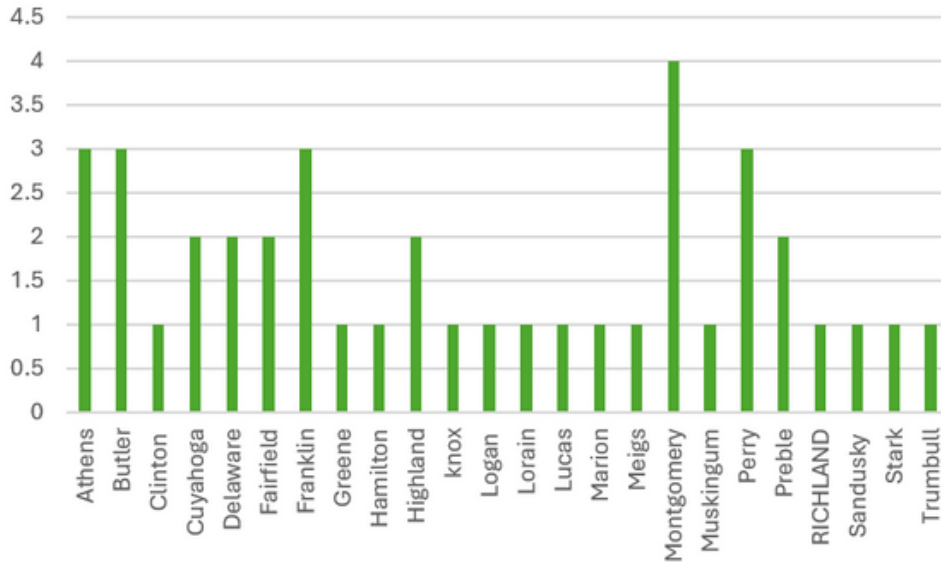


Participants were given the USDA's definition of socially disadvantaged groups and were asked to select all that apply.

- Fifty percent of all who responded to the survey were female principal owners.
- Fourteen percent of the people who participated in the survey were veterans.

- Twenty-two percent of respondents identified as Black of African American while a combined 6% percent identified as Native Hawaiian or other Pacific Islander (2%), Middle Eastern or North African (2%), or Hispanic or Latino (2%).

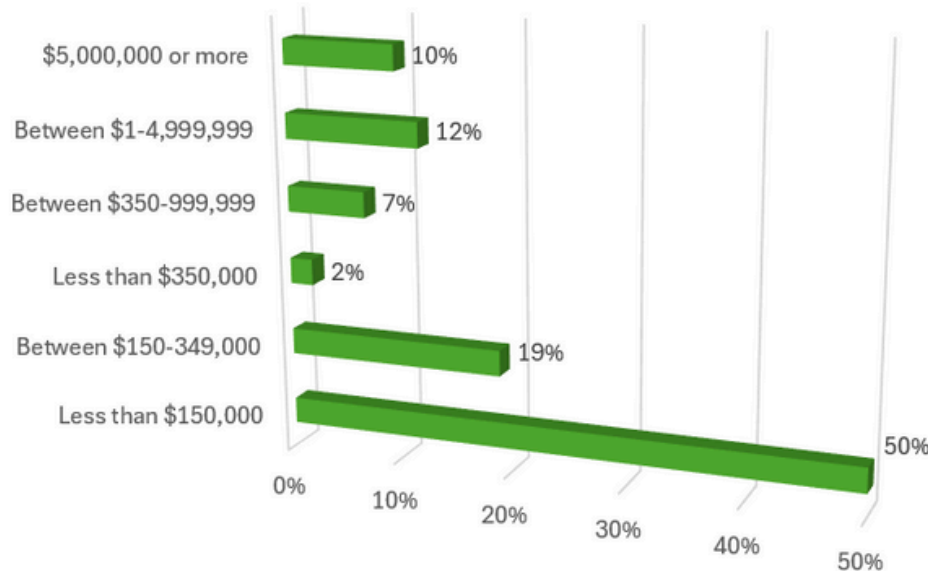
Table 4: Location of Business by County



Participants were asked to identify the county where their business was located.

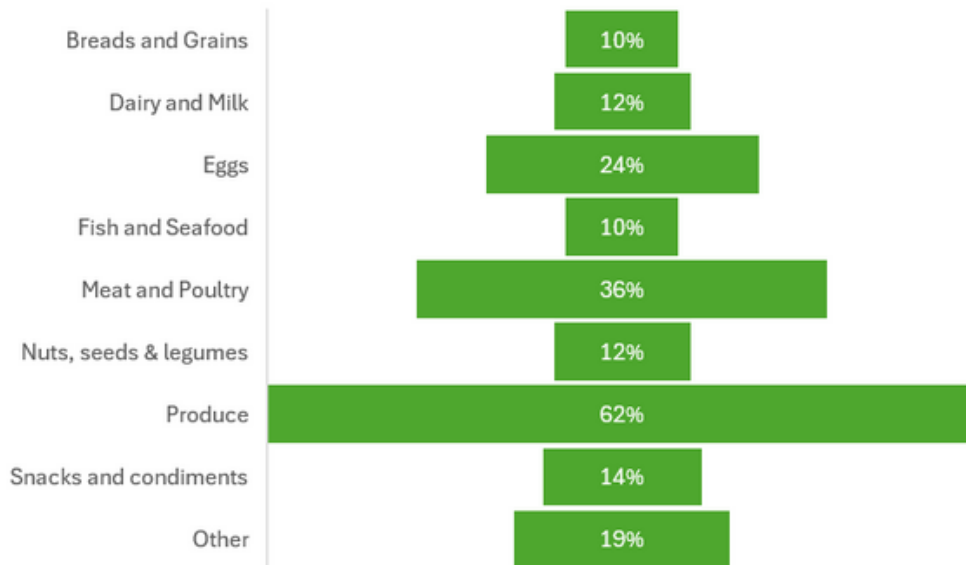
- Montgomery county had the highest number of reported businesses followed by Athens, Bulter, Franklin, and Perry counties, respectively.

Table 5: Size of Farm or Business by Gross Cash Farm Income (GCFI) Categories



- Fifty percent of respondents indicated their farm or business had a GCFI of \$150,000 or less and another 19% of respondents had a GCFI between \$150,000-349,000.
- Twelve percent indicated their farm or business had a GCFI between \$1,000,000-4,999,999, and another 10% reported a GCFI of \$5,000,000 or more.

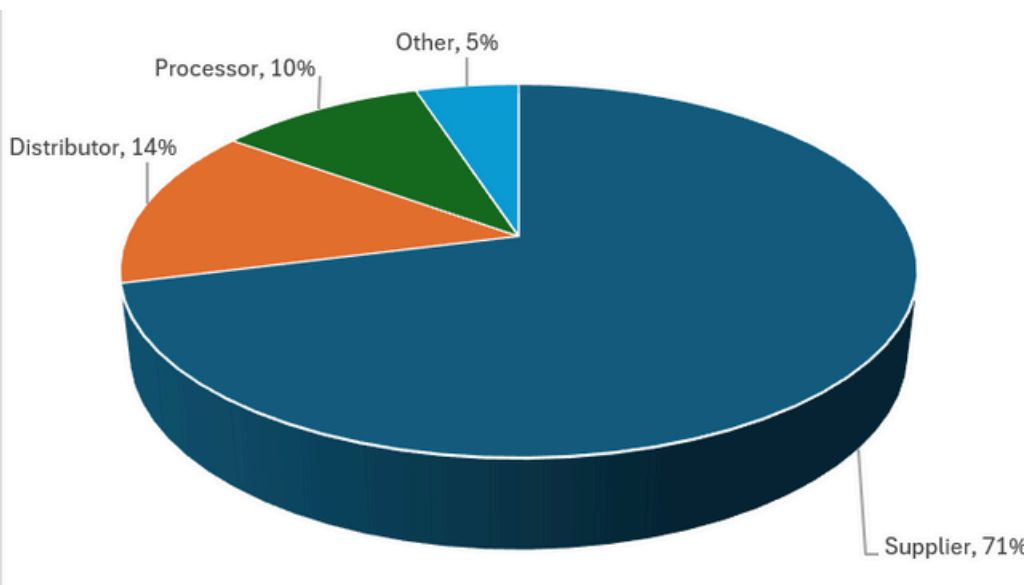
Table 6: Types of Products Offered by Participating Businesses



Participants were asked to select all product categories offered at their farm or business.

- Produce (62%), Meat & Poultry (36%), and Eggs (24%) were the most common types of products offered in 2024.
- Nineteen percent stated they offered products not represented in categories above which included items such as field corn, soybeans, wheat, hay, straw, beef cattle, herbs, honey, canned goods, and flowers.

Figure 2: Percentage of Respondents by Occupational Category

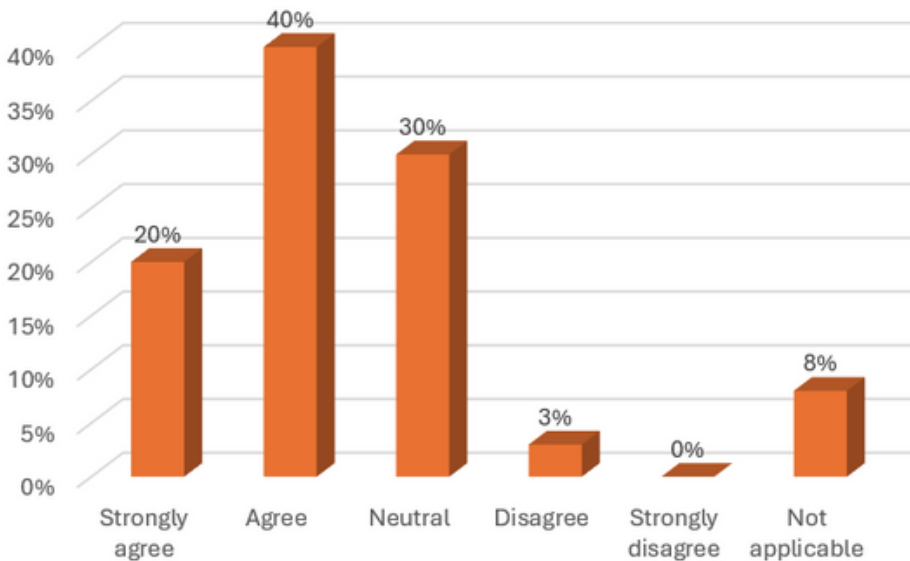


- When asked about occupational categories, seventy-one percent of respondents identified as a farmer or supplier.
- Of those who identified as a farmer or supplier, 24% said they also identified as an aggregator.
- Of the 5% who selected 'Other', grower was term they used to describe their occupational category.

II. BUSINESS GROWTH

Participants responded to a series of questions that explored the ways in which participating in the Ohio CAN Program impacted their growth trajectory.

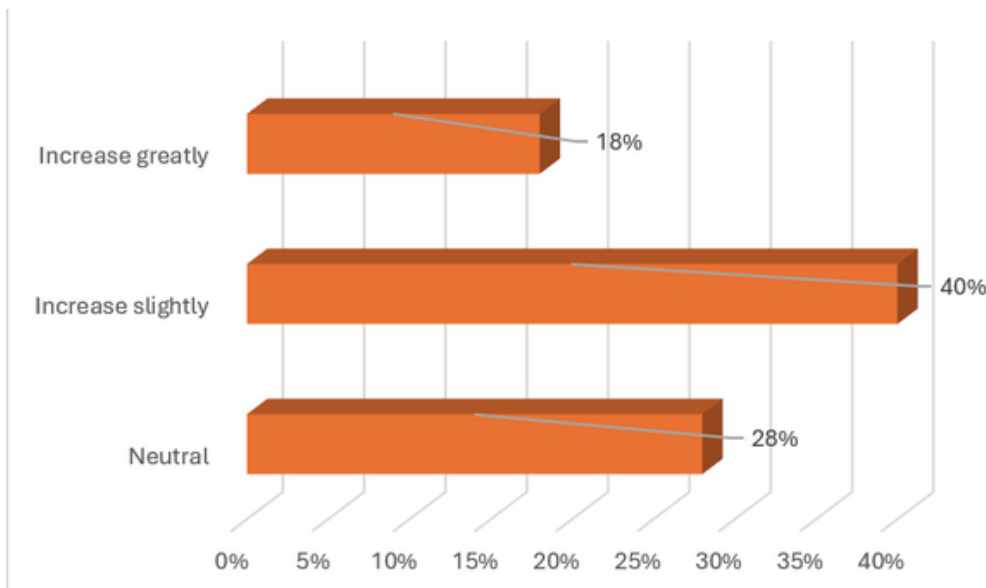
Table 7: Perception of Preparedness to Sell to Institutional Wholesale Buyers



- Only 3% disagreed that participation in the Ohio CAN program resulted in greater preparedness.

- A total of 60 percent of respondents either strongly agreed (20%) or agreed (40%) that involvement with the Ohio CAN program resulted in feeling more prepared to sell to wholesale buyers.
- Thirty percent of participants reported being neutral about whether or not participation in Ohio CAN led to greater preparedness to sell to wholesale buyers.

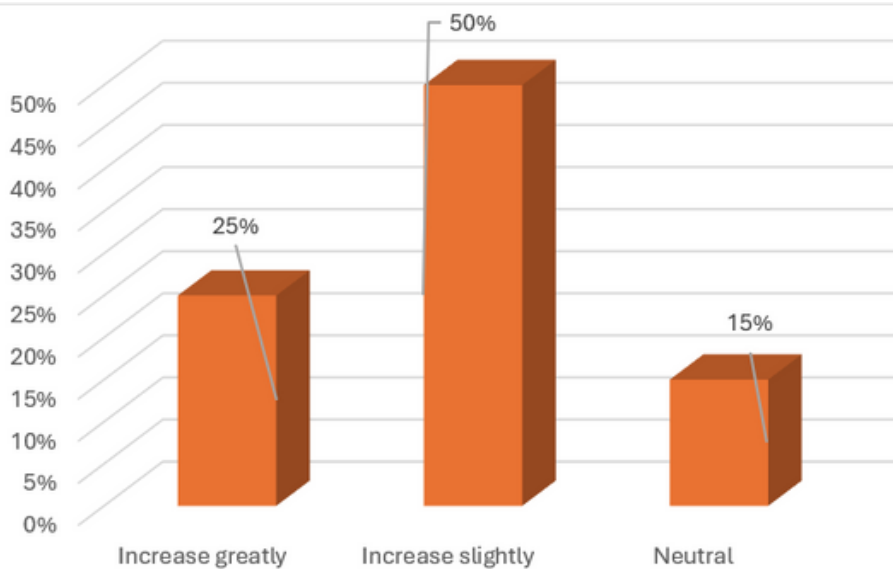
Table 8: Perception of Change in Crop Planning Expertise



- No respondents indicated that participation in the Ohio CAN program decreased their knowledge and expertise about crop planning.

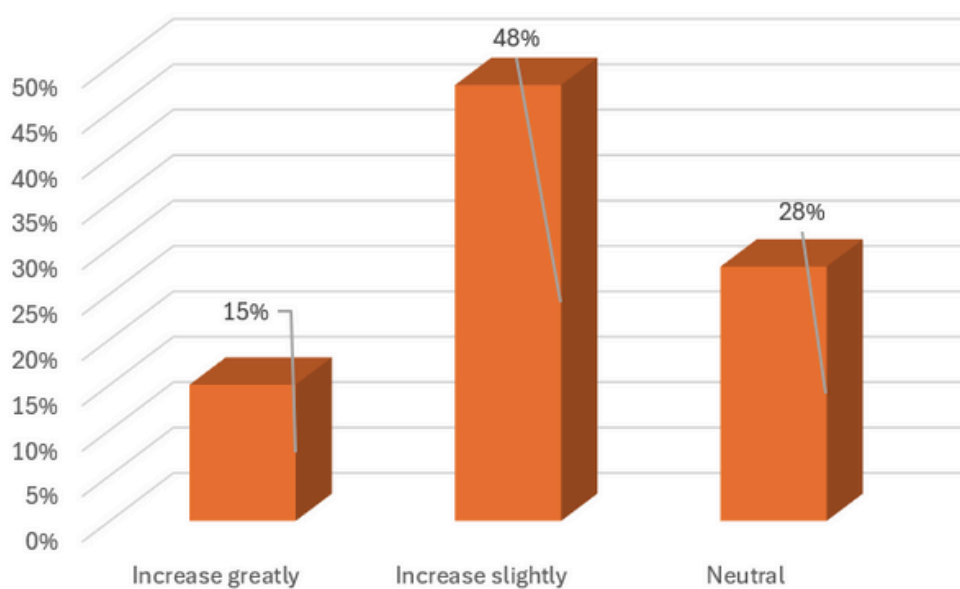
- When participants were asked if their knowledge or expertise about crop planning changed due to involvement with the Ohio CAN Program, 18% stated that their knowledge or expertise increased greatly and 40% said that it increased slightly.
- Twenty-eight percent reported neutrality about whether or not participation led to increased knowledge or expertise.

Table 9: Perception of Change in Forecasting Ability



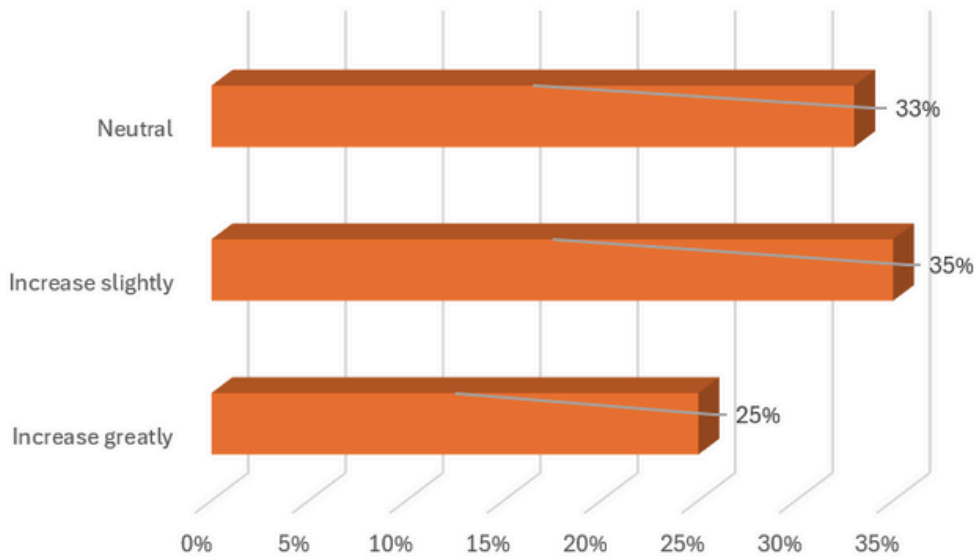
- Seventy-five percent of participants stated that involvement in the Ohio CAN program either greatly increased (25%) or slightly increased (50%) their knowledge and expertise about forecasting.
- Fifteen percent of respondents reported that involvement neither increased or decreased their knowledge or expertise of forecasting.
- No respondents reported that it decreased their knowledge in this area.

Table 10: Perception of Change in Marketing Expertise



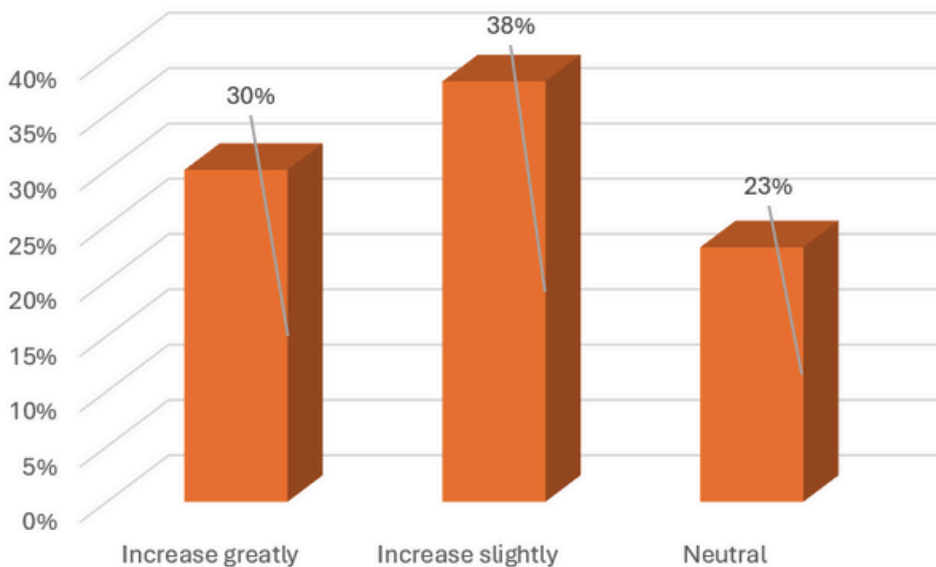
- When asked if knowledge or expertise changed about marketing, 63% of respondents stated that it greatly increased (15%) or slightly increased (48%) due to participating in the Ohio CAN program.
- Twenty-eight percent of participants reported being neutral about whether or not their marketing knowledge changed.
- No respondents stated that their marketing knowledge decreased in any measure.

Table 11: Perception of Change in Financial Management Strategies



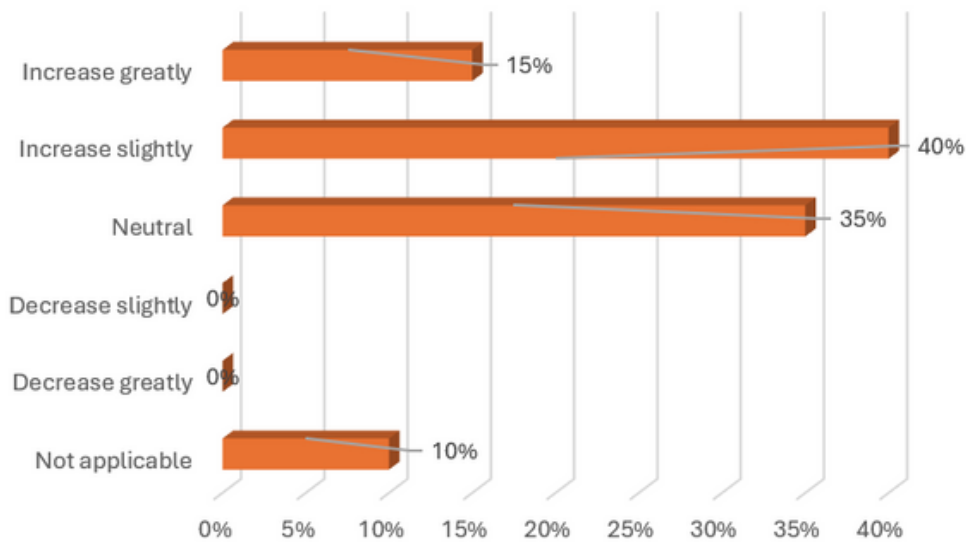
- Sixty percent of respondents reported that participation in the Ohio CAN program greatly increased (25%) or slightly increased (35%) their knowledge about financial management strategies.
- No respondents reported a decrease in knowledge about financial management strategies.

Table 12: Perception of Change in Coordination of Delivery Logistics



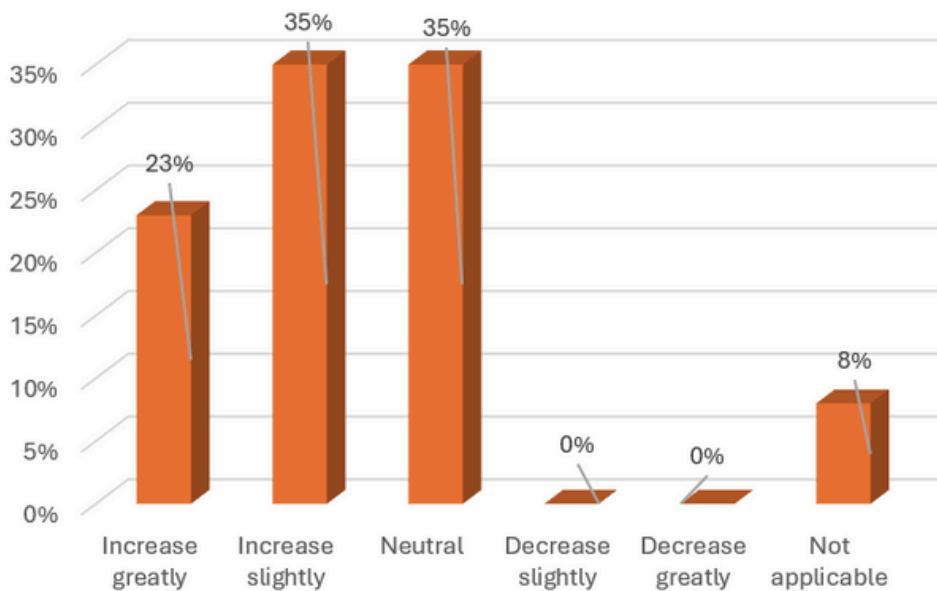
- Sixty-eight percent of respondents reported that their knowledge of delivery logistics greatly increased (30%) or slightly increased (38%) due to involvement with the Ohio CAN program.
- No respondents indicated that their knowledge of delivery logistics decreased.

Table 13: Perception of Change in Business Planning



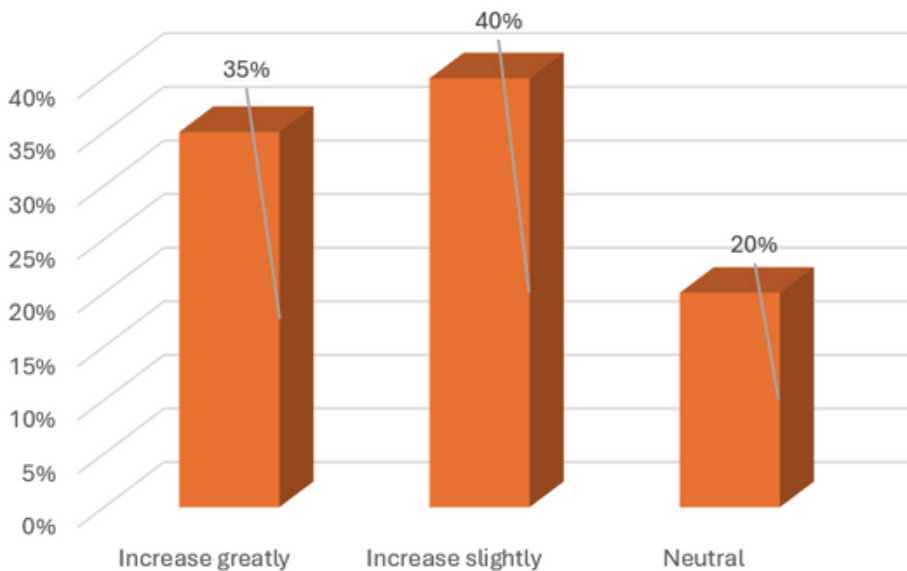
- Fifty-five percent of participants who responded to the survey stated that their knowledge about planning greatly increased (15%) or slightly increased (40%) due to involvement with the Ohio CAN program.

Table 14: Perception of Change in Workforce Management



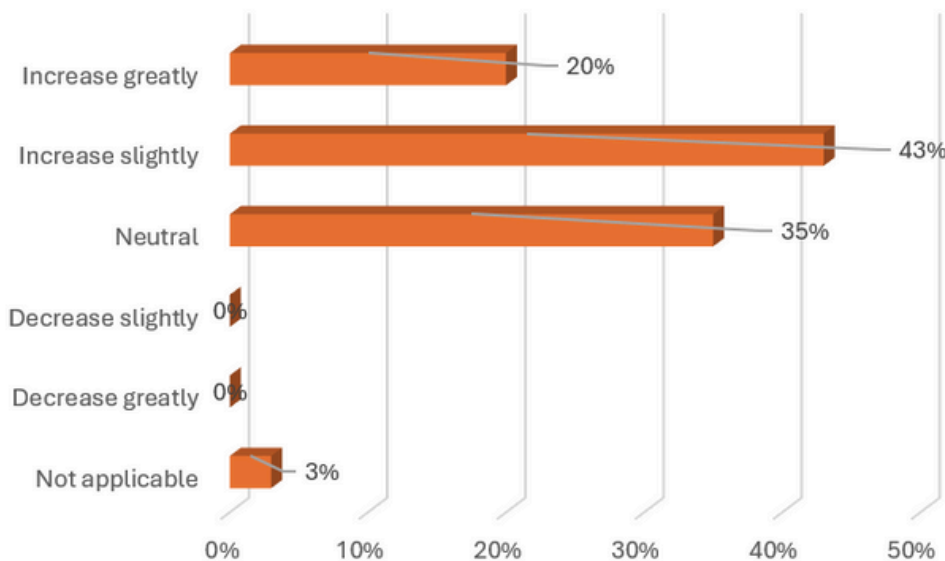
- Fifty-eight percent of participants who responded to the survey reported their knowledge or expertise about workforce management greatly increased (23%) or slightly increased (35%) due to involvement with the Ohio CAN program.

Table 15: Perception of Change in Expertise about Food Access Channels



- Seventy-five percent of those who responded to the survey indicated that their knowledge about food access channels and how they affect local community greatly increased (35%) or slightly increased (40%).
- No respondents reported that participation in the program decreased their knowledge about food access channels.

Table 16: Perception of Change in Expertise about Standardization Processes

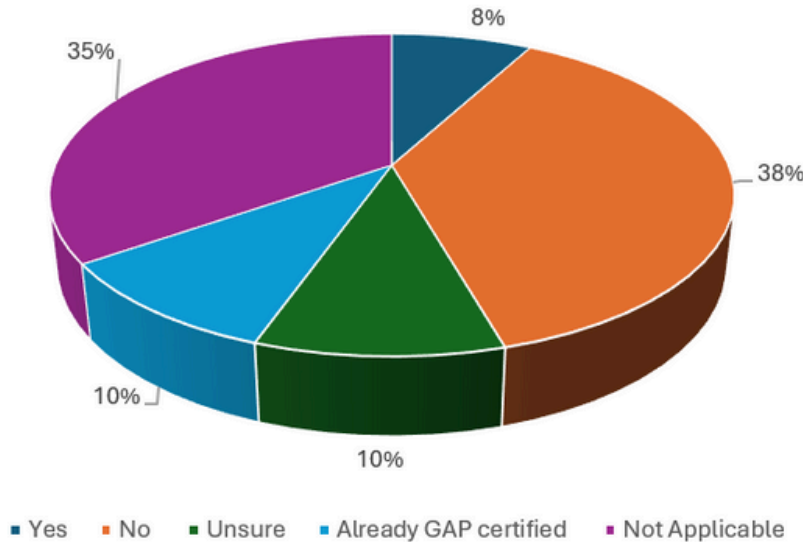


- The majority of participants (63%) reported that their knowledge or expertise about standardization processes either greatly increased (20%) or slightly increased (43%) through involvement with the Ohio CAN program.

III. FOOD SAFETY

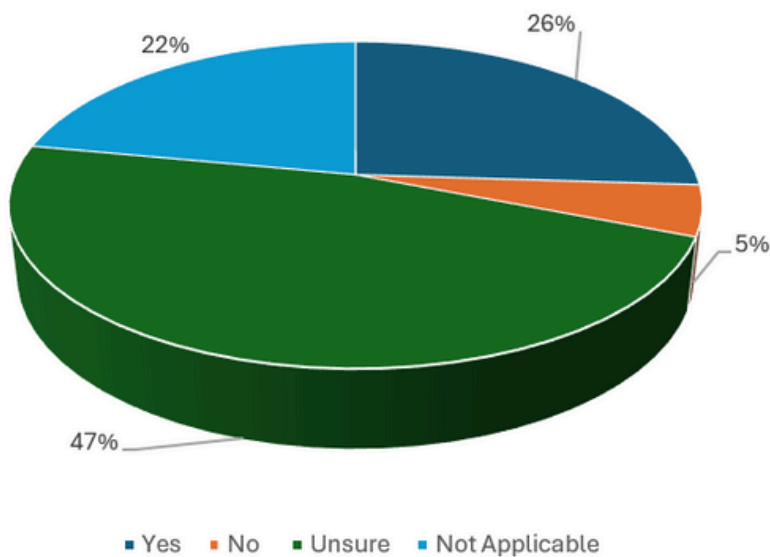
Participants responded to questions about certifications and procedures concerning food safety regulations.

Figure 3: Percentage of Participants who Acquired GAP Certification



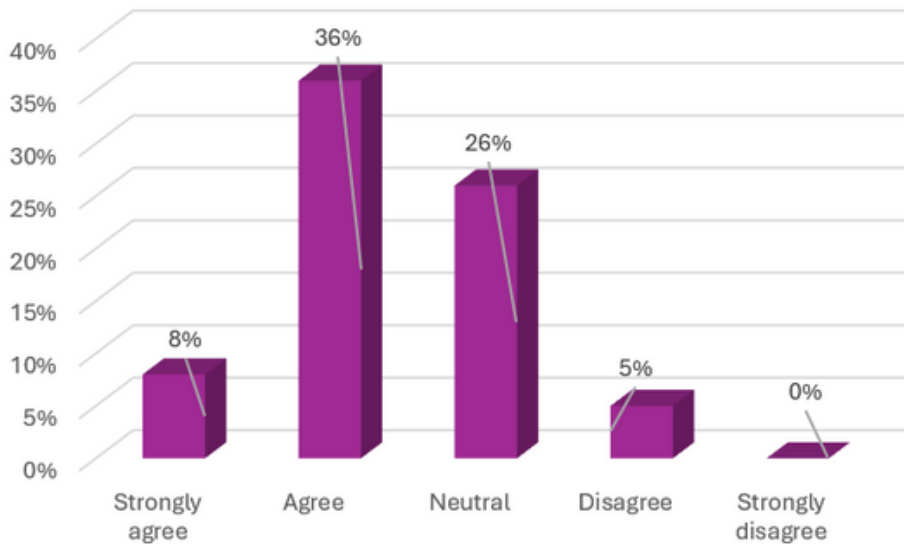
- Eight percent of respondents acquired GAP certification during their involvement with the Ohio CAN program. Thirty-eight percent did not become GAP certified.
- At the time the survey was conducted, 10% of participants already had GAP certification and another 10% were unsure if they had it or not.

Figure 4: Percentage of Participants who Acquired GAP Certification



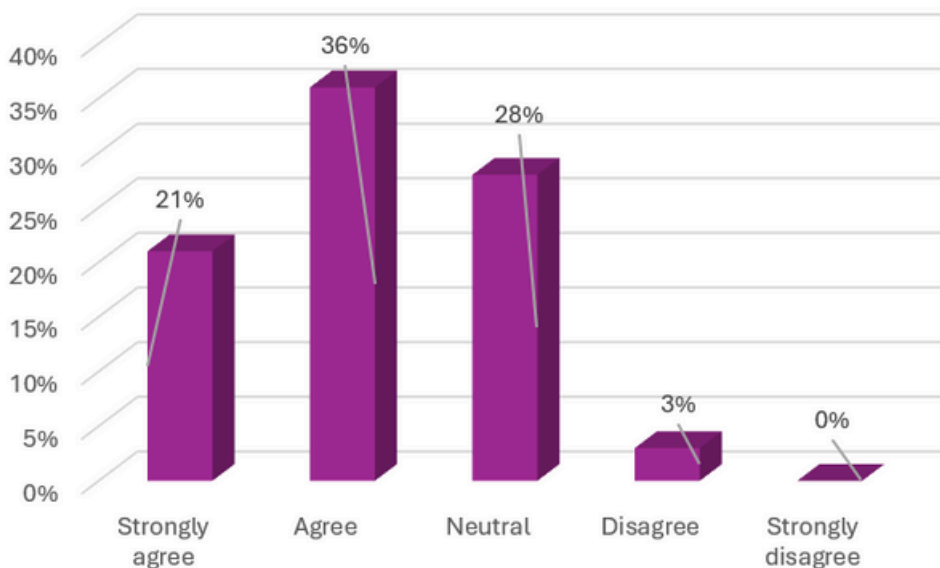
- Of those who indicated they did not have GAP certification, 26% stated they plan to pursue it due to involvement with the Ohio CAN program.
- Five percent stated they would not seek GAP certification and 47% said they were unsure about whether they would become GAP certified.

Table 17: Perception of Change in Acquiring Food Safety Certifications



- Forty-four percent of participants strongly agreed (8%) or agreed (36%) that participation in Ohio CAN better prepared them to seek out GAP or other food safety certifications.
- Five percent of respondents felt that the program did not prepare them to obtain other food safety certifications.

Table 18: Perception of Change in Familiarity with Food Safety & Handling Requirements

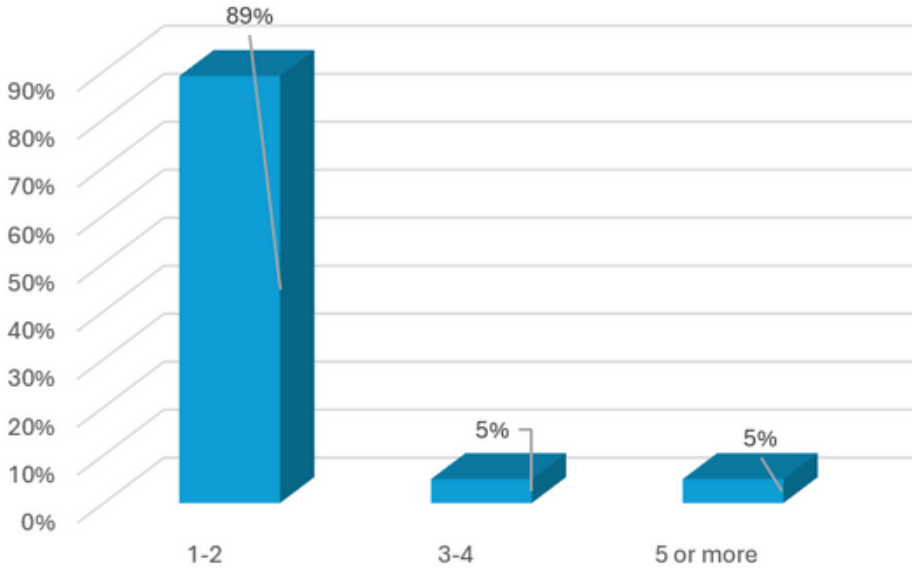


- As a result of participation in the Ohio CAN program, 57% of respondents reported that they strongly agreed (21%) or agreed (36%) that they are more familiar with food safety and handling requirements of institutional wholesale buyers and distributors.

IV. IMPACT OF THE OHIO CAN PROGRAM

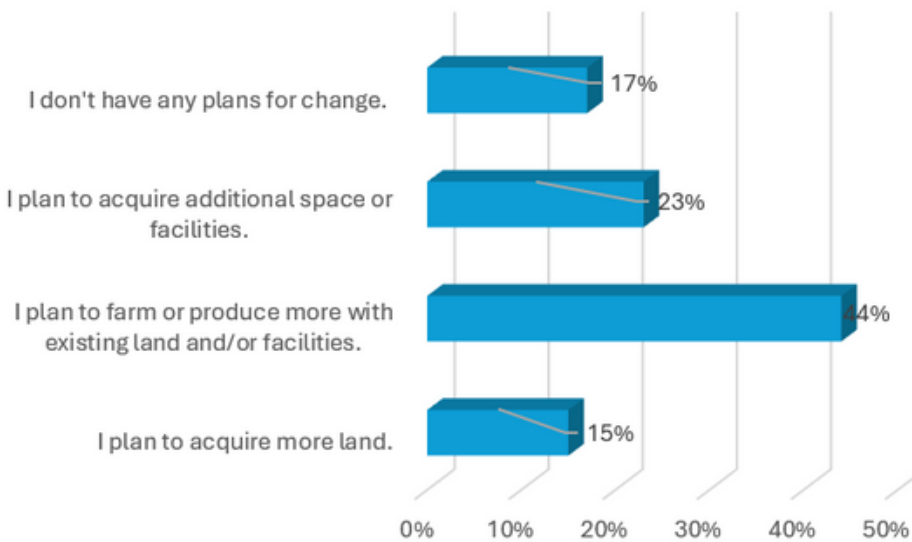
Participants responded to questions about employment, business growth, food supply chain resiliency, and implementation of the Ohio CAN program.

Table 19: Reported Increase in Full-time Employment



- Of the respondents who reported hiring additional staff due to participation in the Ohio CAN Program, 89% hired 1-2 employees, 5% hired 3-4 employees, and 5% hired five or more employees.
- When asked about hiring part-time staff, 77% indicated they hired 1-2 employees, 11% hired 3-4 employees, and 16% hired 5 or more employees.

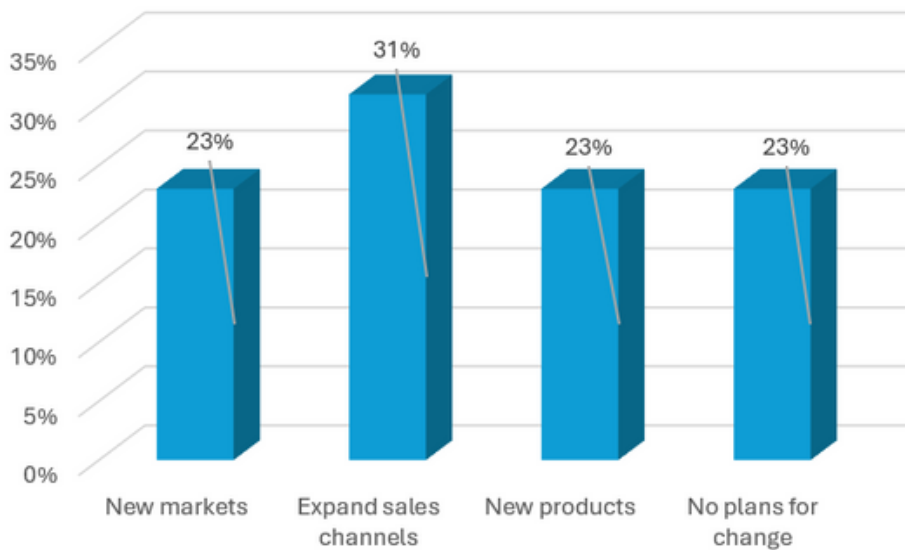
Table 20: Reported Strategies for Business Growth



- As a result of participating in the Ohio CAN program, 44% of participants indicated they intend to farm or produce more with existing land or facilities.
- Twenty-three percent stated they plan to acquire more space of facilities while another 15% of respondents intend to acquire more land.
- No participants reported making any reductions to land, property, or facilities.

- Forty-eight percent of participants reported hiring additional employees since participating in the Ohio CAN program.

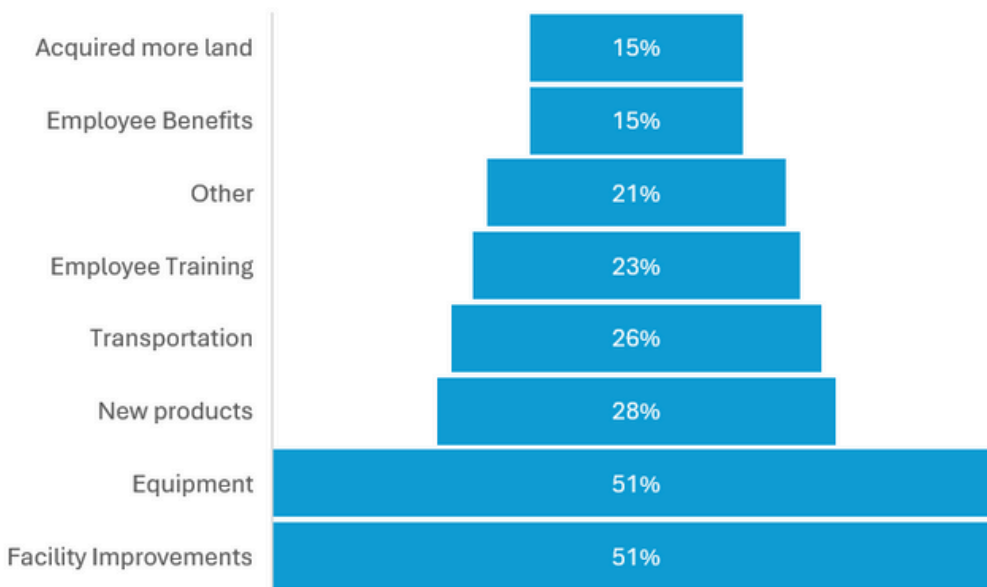
Table 21: Strategies for Market Expansion



- When participants were asked about their next step for distribution scope and market reach, 31% said they plan to expand sales channels.
- Twenty-three percent indicated they plan to expand to new markets in different geographical areas beyond their current scope of operation and another 23% plan to add new product types.

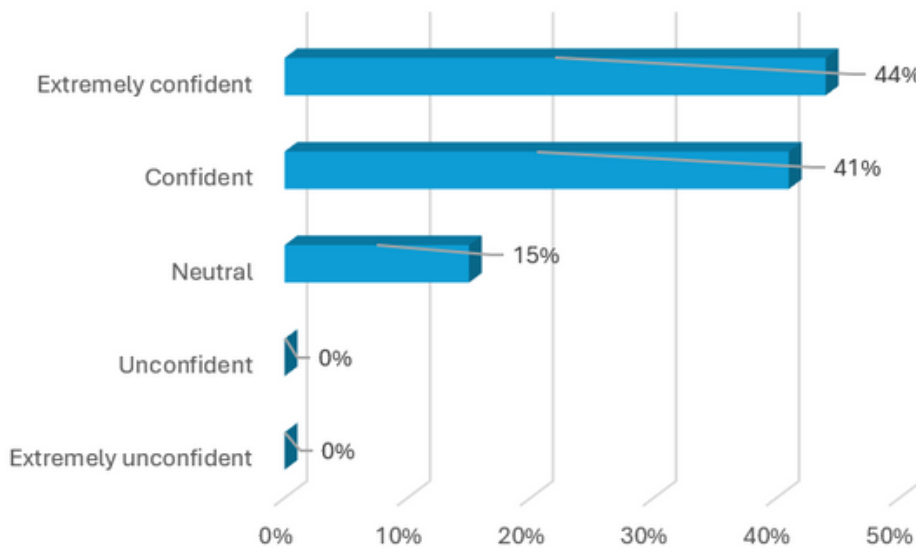
- Twenty-three percent of participants reported having no plans for market expansion.
- No participants reported plans to reduce distribution or market reach.

Table 22: Strategies for Market Expansion



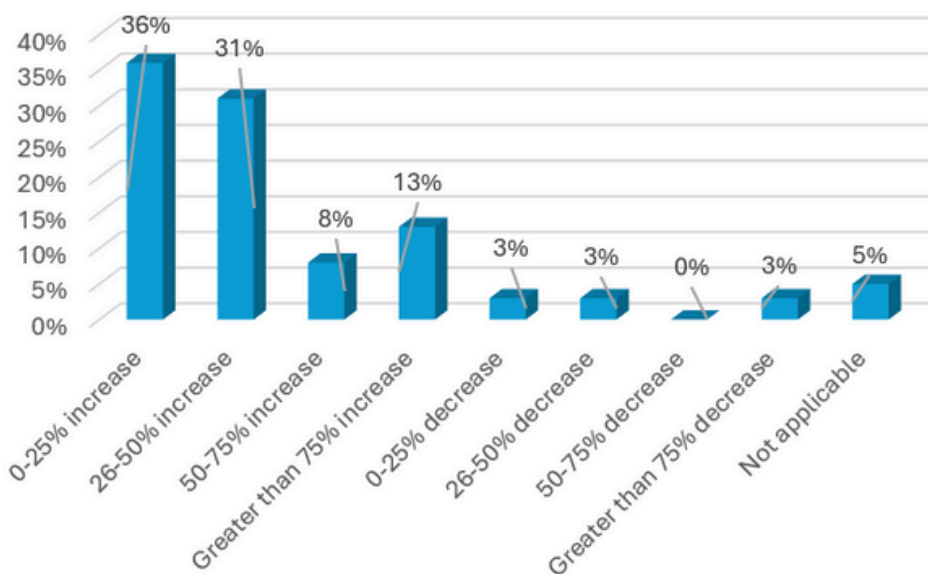
- Participants were asked to identify any investment strategies they did as a result of the Ohio CAN program. Participants were allowed to identify more than one strategy if appropriate.
- Equipment and improvements to facilities were the two most frequent investments participants reported.

Table 23: Perceptions of Confidence in Long-term Career Plan



- Eighty-five percent of respondents indicated they are extremely confident (44%) or confident (41%) that their long-term career will be in food production.

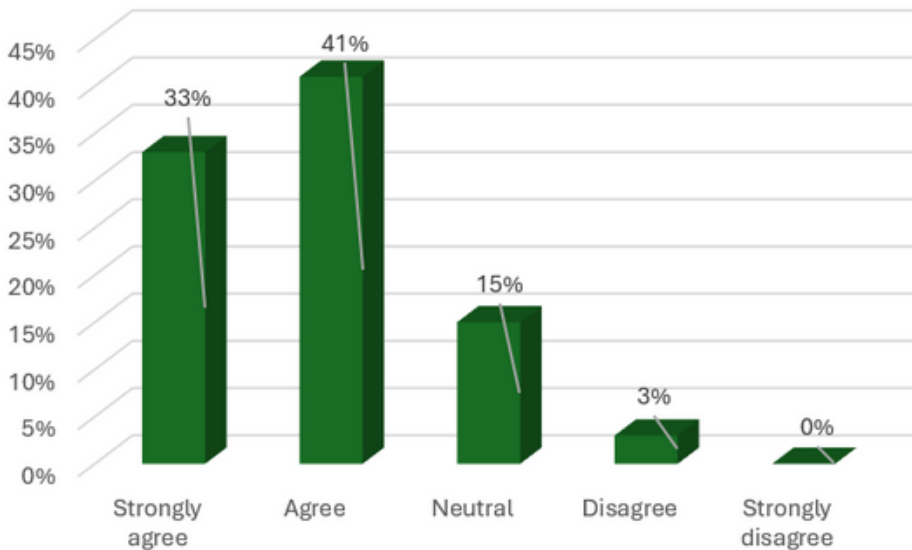
Table 24: Reported Percentage Change in Sales



Participants were invited to indicate how overall sales changed since they started working with the Ohio CAN program two years ago.

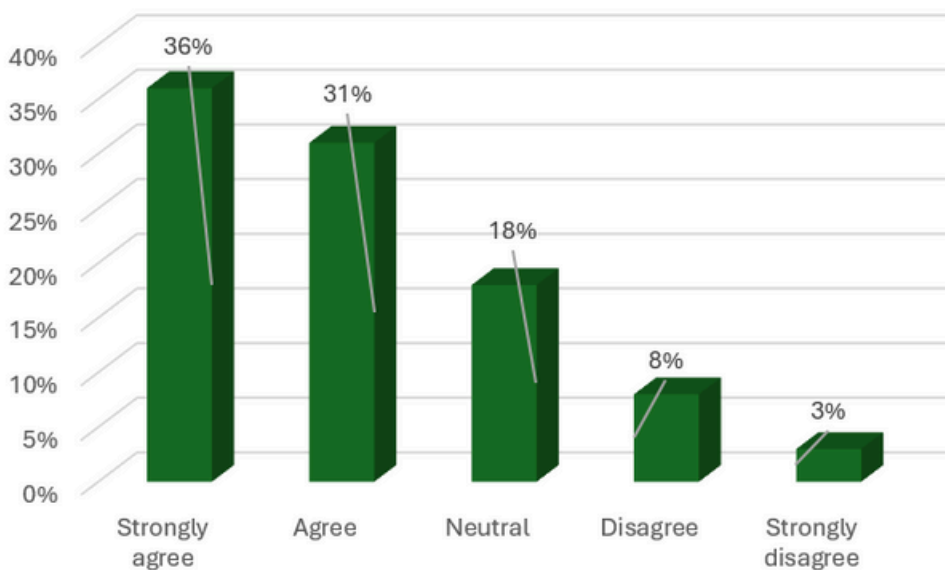
- Thirty-six percent reported a 0-25% increase in sales and 31% reported a 26-50% increase in sales.
- Thirteen percent reported an increase in sales greater than 75 percent while 3% indicated a decrease in sales 75% or greater (3%).

Table 25: Perception of New Business Relationships and Opportunities



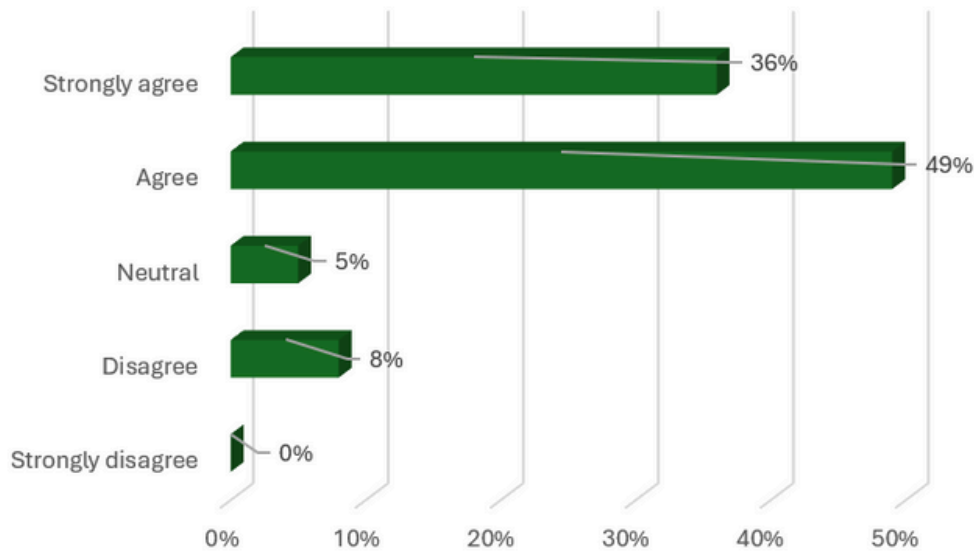
- Seventy-four percent of respondents strongly agreed (33%) or agreed (41%) that participation in the Ohio CAN program expanded new business relationships and opportunities.
- While not shown in Table 25, Eighty-nine percent of participants strongly agreed (54%) or agreed (36%) that participation in the program led to new revenue opportunities.

Table 26: Perception of Change in New Relationships with Other Farmers



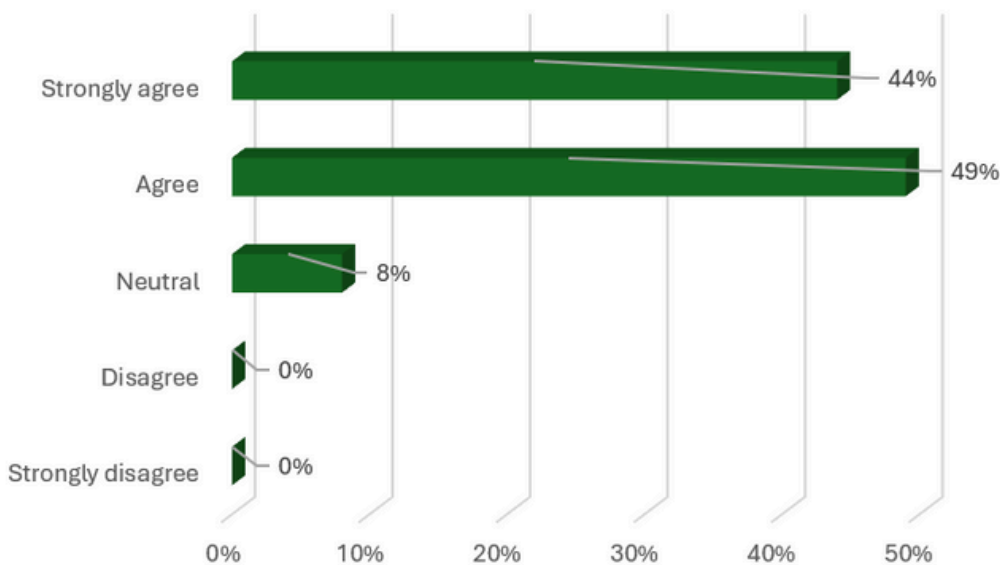
- The majority of participants strongly agreed (36%) or agreed (31%) that they forged new relationships with other farmers as a result of the Ohio CAN program.
- A combined 11 percent disagreed (8%) or strongly disagreed (3%) that the program led to new relationships with other farmers.

Table 27: Perception of Change in Sense of Community



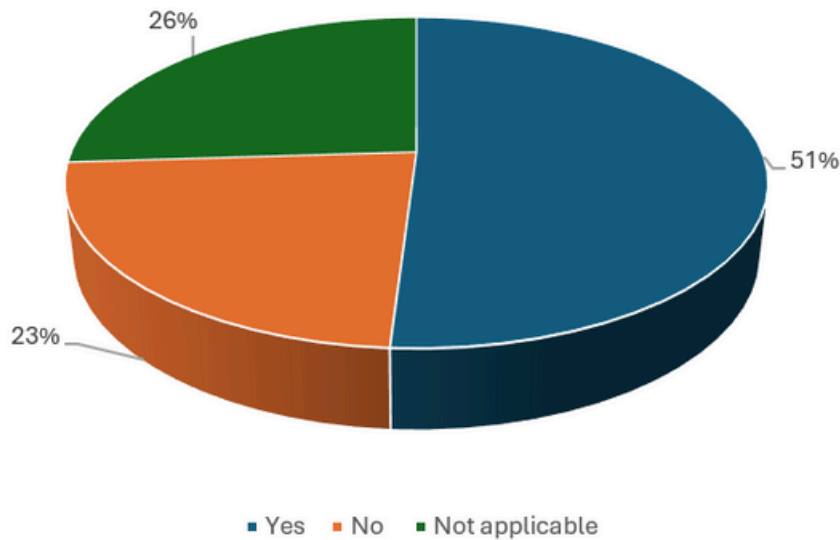
- The majority of respondents (85%) strongly agreed (36%) or agreed (49%) that their sense of community expanded due to their involvement with the Ohio CAN program.

Table 28: Perception of Sense of Purpose and Meaning



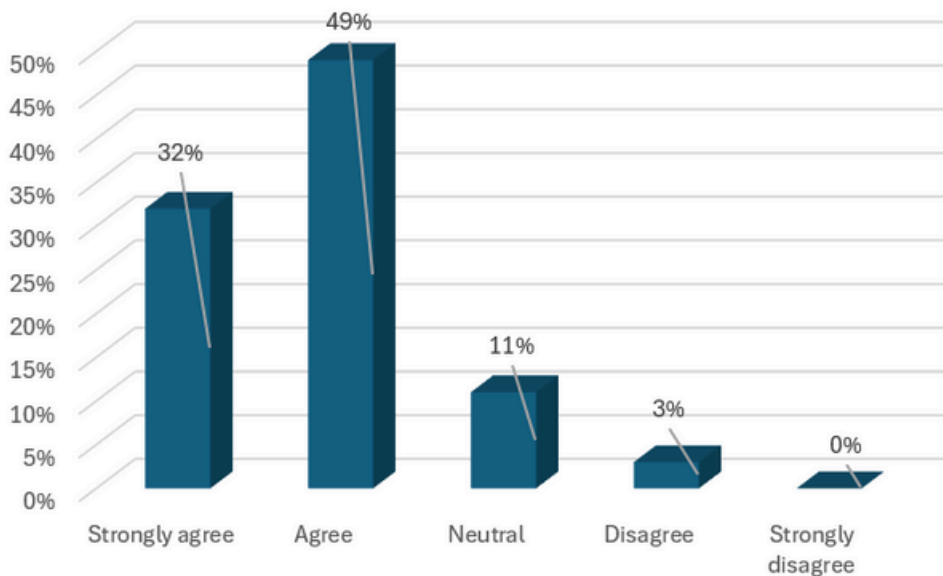
- Ninety-three percent of all respondents strongly agreed (44%) or agreed (49%) that providing food to people who need it most provided a sense of purpose and meaning.

Figure 5: Percentage Able to Supply Wholesale Buyers



- Fifty-one percent of respondents reported being able to supply wholesale buyers due to new relationships with other suppliers who are aggregating product.
- While not shown in Figure 5, seventy-four percent of participants indicated these relationships are very important (37%) or important (37%) in the ability to maintain sales at an institutional level.

Table 29: Perception of Quality of Life

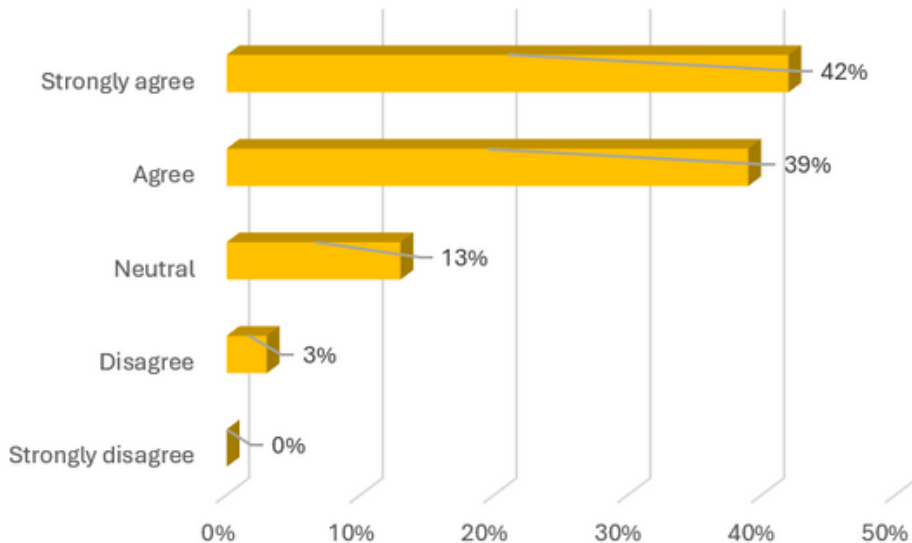


- Eighty-one percent of participants strongly agreed (32%) or agreed (49%) that involvement with the Ohio CAN program enhanced their quality of life.
- While not shown in Table 29, seventy-three percent of respondents strongly agreed (26%) or agreed (47%) that participation enhanced their well-being.

V. IMPACT OF THE OHIO CAN PROGRAM IF IT DOES NOT CONTINUE

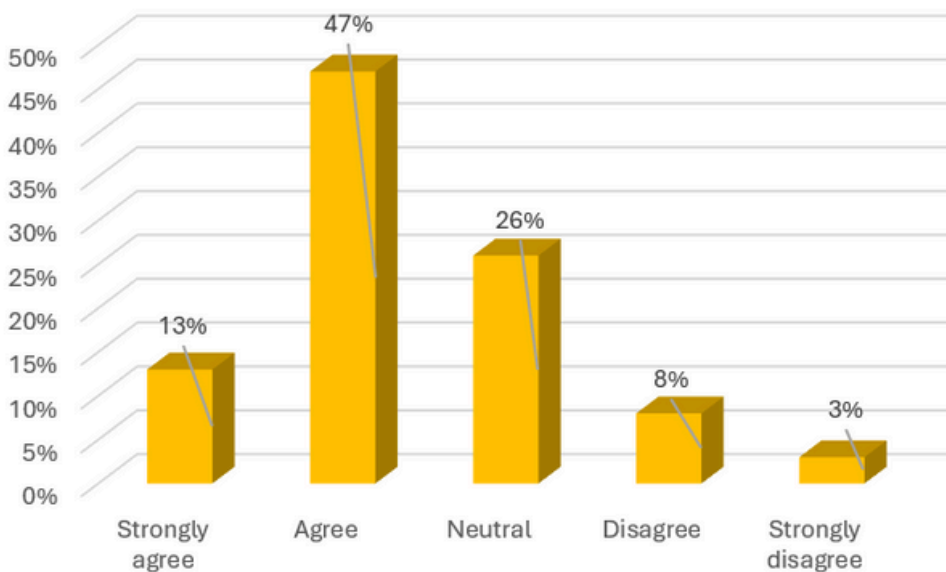
Participants responded to questions about Ohio CAN if the program does *not* continue.

Table 30: Perception of Brighter Business Prospects



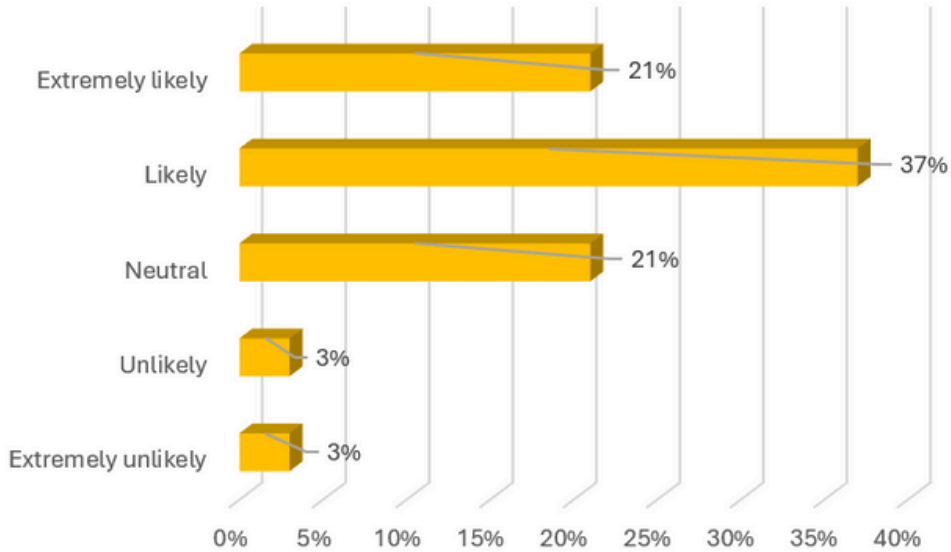
- Eighty-one percent of participants strongly agreed (42%) or agreed (39%) that their business prospects are brighter than they were prior to the start of the Ohio CAN program.

Table 31: Perception of Business Outlook



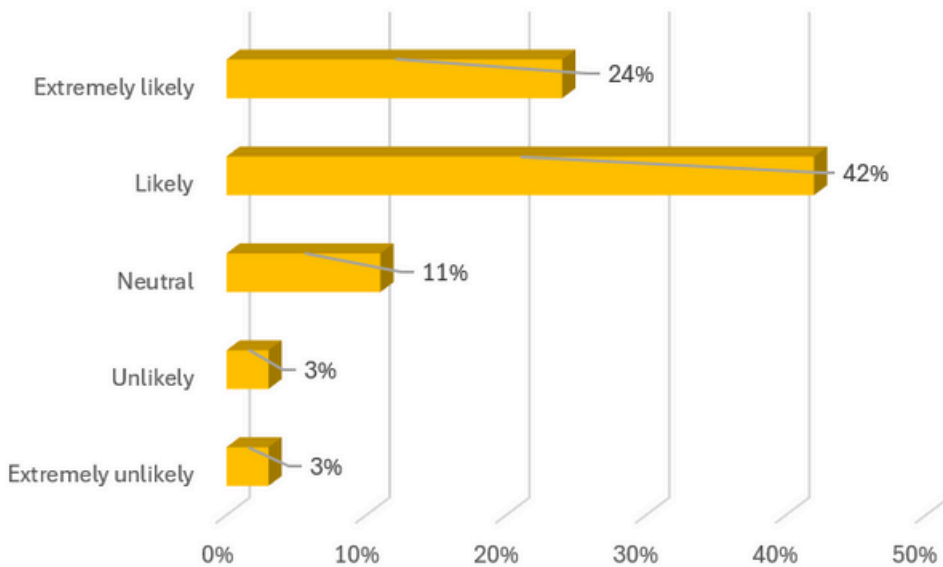
- If the Ohio CAN program does not continue, 47% of respondents agreed and 13% strongly agreed, that their business will be in a more favorable position due to the ongoing support they already received from participating in the program.

Table 32: Intention to Reduce Staff if Ohio CAN Does Not Continue



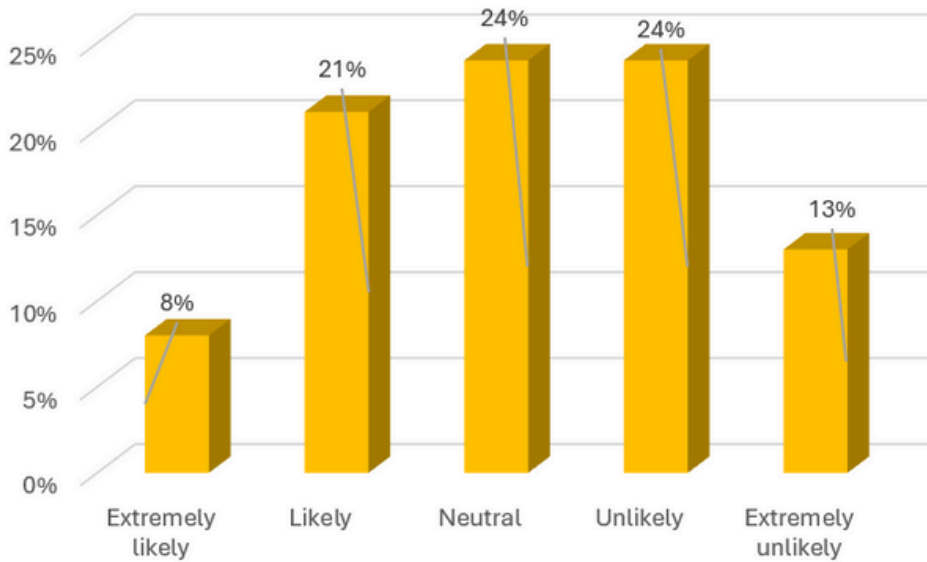
- Fifty-eight percent of respondents stated that they would be extremely likely (21%) or likely (37%) to reduce the number of employees if the Ohio CAN program does not continue.

Table 33: Intention to Reduce Staff if Ohio CAN Does Not Continue



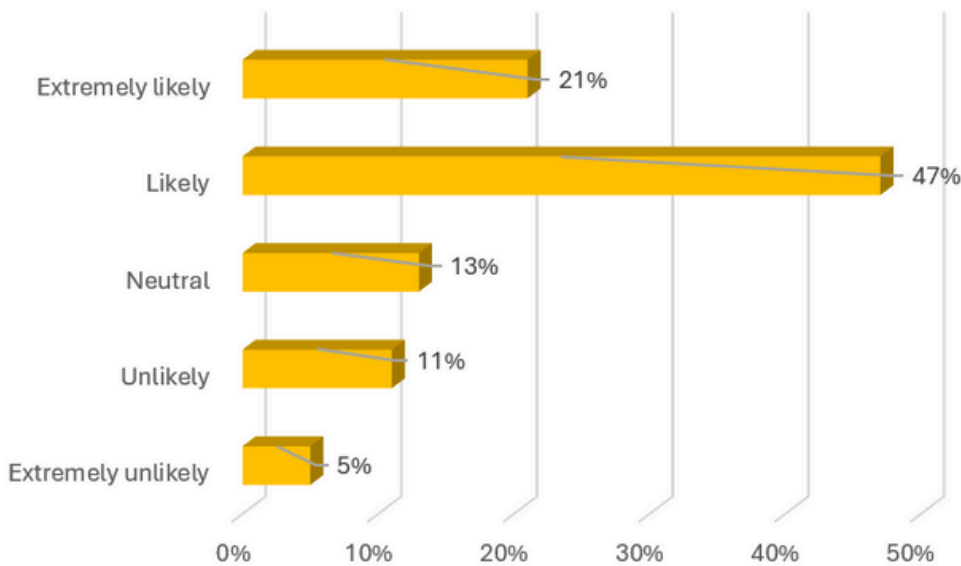
- A combined 68% of participants indicated that it is extremely likely (24%) or likely (42%) that they will reduce the number of hours for their employees if the Ohio CAN program does not continue.

Table 34: Plans to Sell to Wholesale Buyers if Ohio CAN Does Not Continue



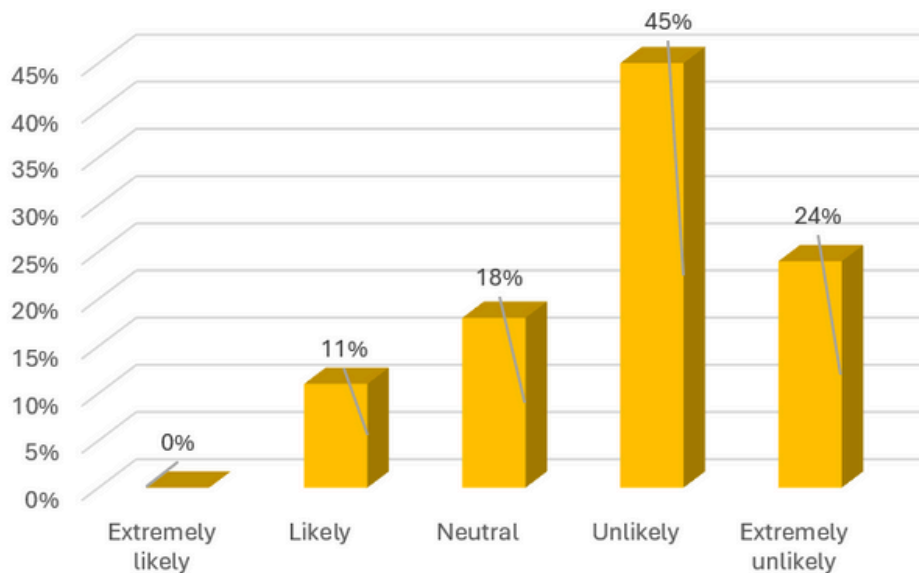
- If the Ohio CAN program does not continue, a combined 37% of respondents said that they would be unlikely (24%) or extremely unlikely (13%) to continue selling to wholesale buyers.

Table 35: Perception of Market Access if Ohio CAN Does Not Continue



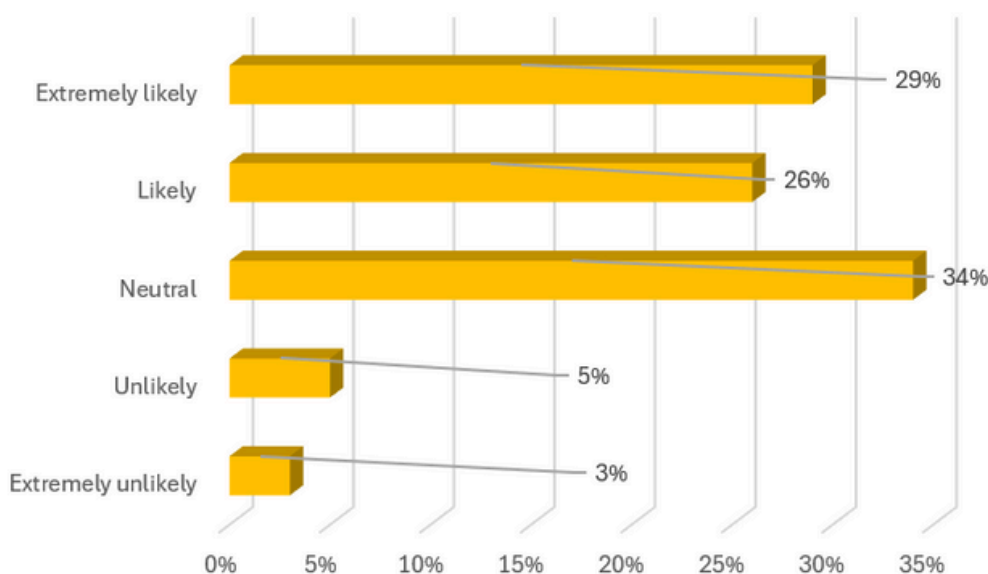
- Sixty-eight percent of respondents reported that they would be extremely likely (21%) or likely (47%) to lose access to other markets or revenue streams if the Ohio CAN program does not continue.

Table 36: Intention to Leave the Business/Sector if Ohio CAN Does Not Continue



- Eleven percent of participants reported that they would likely leave the business or sector if the Ohio CAN program does not continue.
- A combined 69% said that it would be unlikely (45%) or extremely unlikely (24%) for them to leave the business if Ohio CAN does not continue in the future.

Table 37: Perception of Financial Hardship if Ohio CAN Does Not Continue



- A combined 55% of participants indicated that they would be extremely likely (29%) or likely (26%) to suffer financial hardship if the Ohio CAN program does not continue.

VI. ECONOMIC IMPACT OF THE OHIO CAN PROGRAM

The table below provides a summary of the economic impact of the Ohio CAN program in state fiscal years 2023 and 2024. Table 1 shows that the \$12.3 millions of direct food purchases from Ohio providers through the Ohio CAN Program in FY23 and FY24 led to an additional \$14.5 million in output produced across the state, for a total increase in output of \$26.8 million. \$6.3 million in additional income was generated across the state, and 166 jobs were created.

Ohio CAN LFPA Program	Direct Economic Impact	Indirect Economic Impact	Total Economic Impact
Food Purchases			
Total Value of Output	\$13.7 million		
Value of Ohio Output*	\$12.3 million	\$14.5 million	\$26.8 million
Income			\$6.3 million
Employment			166 jobs

* The FY23 & FY24 cost of \$12.3 million in Ohio CAN Ohio-sourced food purchases is based on data from the Ohio Association of Foodbanks.

VII. MAIN FINDINGS

The Ohio CAN program has had a significant and positive impact on its participants, strengthening local agriculture and food security. Survey results show that the program has:

- Increased sales and enabled market expansion.
- Allowed participants to hire additional employees.
- Fostered new business relationships, with nearly 75% of respondents reporting new opportunities.
- Increased interactions among farmers, with two-thirds of respondents engaging more with peers.
- Improved business prospects for over 80% of participants.

Participants of Ohio CAN identified key skills gained through the program in four areas:

- Business & Strategy: Cash flow management, efficiency, communication with nonprofit partners, and improved planning.
- Operations: Food safety, packaging, recordkeeping, and process improvements to enhance quality and efficiency.
- Relationships: Networking with food access partners, community organizations, and farmers to strengthen the local food ecosystem.
- Values: Emphasis on the farm-to-table movement and community impact.

Feedback on food safety related to Ohio CAN fell into three categories:

- **Praise:** Participants emphasized Ohio CAN's role in upholding high food safety standards through training and compliance.
- **Indifference:** Some small farmers felt that GAP certification favors larger farms and does not align with their needs.
- **Innovation:** Farmers suggested alternative food safety strategies, such as a coaching program for GAP certification.

Participants shared the following insights about their business growth since joining Ohio CAN:

- **Growth:** Many farmers expanded production, infrastructure, and marketing strategies, with some reporting sales increases of over 400%.
- **Stability:** The program provided a predictable market, allowing small and historically disadvantaged farmers to anchor their business growth and reduce financial risks.
- **Impact on Sales:** Farmers reported varying levels of sales growth, with increases ranging from 8% to over 100%. Some also highlighted challenges such as drought and funding fluctuations.
- **Praise:** Many participants credited Ohio CAN as the most impactful local food initiative they have experienced, praising the program's leadership and community impact.

Farmers expressed a strong desire for continued support of Ohio CAN, highlighting its impact in the following areas:

- **Praise & Appreciation:** The program is a "win-win" for farmers, food pantries, and community members in need. Participants expressed gratitude for its existence and the policymakers who support it.
- **Survival & Sustainability:** Ohio CAN has allowed small farms to remain viable, supporting early-stage farmers through critical growth periods. Many stated their farms would not survive without it.
- **Stability:** Reliable income from the program helps farmers manage seasonal cash flow challenges and invest in long-term sustainability.
- **Growth & Opportunities:** The program creates new revenue streams, allowing farmers to scale operations, hire staff, and invest in equipment and land.
- **Community & Collaboration:** By connecting farmers, foodbanks, and consumers, Ohio CAN strengthens the local food system, reduces waste, and increases food security.
- **Pride & Respect:** Farmers emphasized that investing in local agriculture benefits the entire state by ensuring a diverse and resilient food supply.

The Ohio CAN program is a transformative initiative that has generated tangible economic benefits while strengthening Ohio's food systems. In FY23 and FY24 alone, **the program led to an additional \$14.5 million in output, resulting in a total increase of \$26.8 million statewide. It also contributed \$6.3 million in additional income and created 166 new jobs.** Continued investment in the program is essential to sustaining these economic gains, fostering long-term agricultural resilience, and ensuring food security for Ohio communities.