

Establishing Marketplace Solutions for North Coast Communities

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Introduction

Oregon's North Coast communities, comprising Clatsop and Tillamook Counties, have long held ties to a strong and vibrant food system. It is home to nearly one thousand farmers and ranchers that manage collectively 48,000 acres of farmland¹, and 266 registered commercial fishing permits and landings that harvest over 179 million pounds of seafood². These activities contribute roughly \$184 million dollars to the regional economy³. Over the past 15+ years this region has seen the emergence of partners, energy, and collaboration to support the development of a more resilient and healthy local food system.

In 2020, with the unforeseen emergence of a global pandemic, both agricultural and seafood supply chains have been put to the test. From large seafood and meat processing facilities shutting down, to the increased risk of farmworker and deckhand contagion, the vulnerability of our globalized food system has shown its weakness. On a local level, significant effort has been made to prevent the transmission of the novel coronavirus by mandating that communities “social distance” and minimize travel outside of their homes, and communities.

From March- June 2020, only “essential” businesses were legally allowed to open to the public. This had a huge impact on Oregon's service and tourism industry that, through visitor spending, contributed \$815 million to the North Coast economy in 2018⁴. According to the National Restaurant Association, March through May, the sector lost 8 million jobs throughout the United States. The association predicts that nationwide, the industry will lose \$240 billion in sales by the end of 2020. At least 3% of U.S. restaurants have closed permanently. Many have been forced to pivot their business model to survive (e.g. restaurants developing online ordering systems and offering take-out or home delivery). As of mid-June 2020, Oregon counties were allowed to phase the reopening of some businesses, with very strict sanitation and social distancing regulations.

This contagious virus has altered the way families and consumers access their food and will likely have long lasting impacts on our economy. However, with predicted “spikes” or “waves” of the virus rolling through communities, consumers are likely to continue to access food through new, and more localized channels.

In response to the spread of COVID-19 and the necessity for creating new alternatives for how people and businesses access local foods, the Oregon Coast Visitors Association (OCVA) diverted its focus and resources to supporting local food systems, a critical component of the tourism industry. In May of 2020, OCVA asked for Ecotrust’s support to assess opportunities to support the local food system. The purpose of this work has been to gather information to identify options and opportunities which will allow food systems leaders to effectively implement efficiencies in aggregation, sale, and distribution of local foods to local customers and keep fishermen on the water and farmers in the field. While this work has been inclusive of the whole food system, extra emphasis and priority has been placed on fisheries and seafood.

¹ United States Department of Agriculture Census, 2017.

² Oregon Department of Fish and Wildlife, Marine Resources. *Permit Holders and Processors Database*, 2018.

³ United States Department of Agriculture Census, 2017; Oregon 2019 Landing Statistics.” ODFW Commercial Fisheries 2016 Landing Statistics, 14 Apr. 2020.

⁴ Oregon Travel Impacts Statewide Estimates 1992 - 2018p.” Dean Runyan Associates, Mar. 2019.

Assessment Findings

From May to July 2020, Ecotrust interviewed 14 producers and food system businesses (8 fishers, 6 farmers, and other food system partners). Each interviewee was asked to respond to six questions (See appendix A). Effort was made to ensure that a variety of producers were selected as interviewees based on their product categories, supply chain, and location. Survey results have been compiled and provided anonymously with respondents representing fishing/seafood stakeholders separated from farming and ranching stakeholders.

Impacts of COVID-19 to Businesses and Supply Chains

One of the major goals of this project is to understand the food system market dynamics that were created by COVID-19, and the ability for producers to be able to meet the growing demand locally, both in the short and long term. The majority of respondents indicated that their business had been impacted by COVID-19, and that they were forced to quickly adapt their supply chain models. With the loss of restaurant sales, many producers looked to direct to consumer models, such as Community Supported Agriculture/Fishery (CSA/F) programs and “no contact” sales via farm stands or delivery via local food hubs.

When interviewees were asked, “How has COVID-19 impacted your business and/or your supply chain (where you sell, how you distribute, etc.)?”, we found that 5 of 8 fishing/seafood business respondents confirmed their business has been impacted **negatively**. This was followed up with a second question, “How are you currently adapting your business model?”. All producers reported that they had adapted their business models, in a least some way.

	Yes	No
Fishers/Seafood	8	0
Farmers and Ranchers	6	0

Positive impacts:

- Farmers increased revenue during what is traditionally a slower part of the season
- Online marketplaces supporting product moving into new/different markets
- Increase in interest in CSA/CSF programs

Negative impacts

- Bottlenecked meat processing facilities
- Sales channels disappearing
- Farmers market regulations resulting in massive decreases in revenue from lost tourism.
- For nearly all fish species, market prices have dropped. Respondents suggested this is due to lack of demand/loss of global markets, as well as domestic markets, such as restaurants.
- Producers are concerned about their safety and health at farmers markets. One farmer noted that if they contract COVID, they will not be able to farm.

All three livestock producers that were interviewed shared similar frustrations surrounding the security of their processing. In order for a livestock farmer to be able to sell cuts of meat to a consumer, they must process their animal at a USDA licensed processing facility. Currently, there are no USDA licensed facilities in Tillamook, Clatsop, or Lincoln Counties. Producers that sell meat via farmers markets, restaurants, or grocery stores must drive to Portland, Eugene, or Mt. Angel to process their meat. Small and mid-sized USDA facilities across the country are experiencing significant bottlenecks in capacity due to closure of larger meat packing houses that were closed due to worker safety issues related to COVID-19. Coastal producers are concerned about the security of their USDA processing given these bottlenecks and shared that slaughter dates are pushing out into Q2 of 2021.

Two of the producers interviewed process their animals at an Oregon Department of Agriculture (ODA) licensed facility on the coast. These establishments remain open for producers that are selling quarters, halves, and whole animals directly to consumers. The ability for this business model to scale is quite limited since consumers often are hesitant to purchase meat in bulk due to the upfront investment required for both a freezer, to store larger volumes of meat, and the meat itself.

All of the farmers indicated that they were not prepared for the increased demand for local food in March. On the North Coast, the busy season for farmers typically spans July- September, which coincides squarely with the farmers market and tourism season. Consequently, livestock producers did not have slaughter dates that could accommodate the increases. A produce farmer noted that they were entering the beginning of their season and did not have much inventory or sold out completely of CSA shares. The farmers that did have inventory in stock reported being nearly sold out of inventory and waiting on butcher dates to restock or are buying inventory from other local farmers to sell through their supply chain. One produce farmer commented that their sales channels kept fluctuating, and markets were disappearing, nearly 60% of their sales needed to move through a different channel.

For fishing businesses, those with diversified market channels have fared relatively well. Though they report it has been a very heavy lift, these businesses have been able to divert sales lost from wholesale restaurant/institutional channels into channels with increased demand, such as selling directly to consumers and into "higher end" wholesale retail/marketplace channels. Accordingly, two fishing businesses selling at least some of their catch into smaller diversified seafood companies commented that business is going very well with those transactions and fair above-current-market prices are being paid. Overall, it was mentioned that sales to restaurants and larger buyers have slowed or completely stopped in some cases. COVID-19 outbreaks with two larger buyers/processors (Pacific Seafoods and Bornstein Seafoods), were noted as a concern and consequential closure of facilities as having affected supply chains. For months, the global/international supply chain has suffered, and countries have ceased or slowed buying from international markets, including the United States. This global decrease in demand for domestic United States products has ripple effects that have reached nearly all fishing communities. Tillamook Bay Clams, most of which is being sold as bait, is a fishery of growing economic importance to the local community. It too has witnessed a dramatic slowdown and left local seafood companies with full freezers.

Changes in Production

We know that producers typically plan their season months, or even years in advance. For example, many produce farmers plan in November and December of the prior growing season. Fishermen have a more regimented harvest of what they can catch and when they can catch it. Often, they can have a general plan in place a year in advance, while also needing to remain nimble to respond to bumper harvests, a poor fishing season, and shifting fisheries regulations. With the spike in demand for local food due to COVID-19, we wanted to understand producers' ability to pivot and increase production. Surprisingly, very few producers noted that they increased production, and named significant barriers to doing so.

When asked about any changes in production due to an increased interest or demand for local food, just 5 of 13 businesses interviewed stated they have increased their production. Five of the fishing businesses said they have experienced overall decreases in demand. Farmers, on the other hand reported they did not increase, or decrease production, but rather their production level stayed the same. One farmer indicated that they were able to increase production of two of their enterprises (eggs and chickens) primarily due to increased demand, and their ability to access financing.

	Increase	Decrease	Stayed the same
Fishers/Seafood	3	5	-
Farmers and Ranchers	2	-	4

The predominant barrier to increasing production for farmers and ranchers is their ability to finance or have adequate cash-flow. One producer noted that they needed to scale up at a time when they had no income (March) and they were already behind on bills. This farmer took advantage of the Small Business Administration's Economic Injury Disaster Loan that has provided a cushion so that they were able to scale up two of their enterprises (eggs and broiler chickens) and have cash-flow to purchase from other farmers to sell into their supply chain.

All three livestock producers interviewed stated that they will not be able to increase production until a USDA processing facility opens on the North Coast. One producer noted that hauling their animals to a USDA processing facility takes significant time and energy, often at the detriment of the animal (having to haul a live animal to Portland or Mt. Angel which is required for USDA processing).

During these discussions, all seafood businesses acknowledged that \$/lb. paid at the dock is down for all species of seafood. As crab is the anchor product for some businesses, many interviewees noted a dramatic price decrease for Dungeness crab in April and May. With one business reporting that their revenue is only half of what it would normally be this time of year, and that they were exploring catching and selling lingcod because of an increase in demand, however it is far less valuable fish than crab. Two small boat fishing businesses reported that prices for crab rebounded enough to allow them to return fishing for them in June. In contrast, a fishing business with a larger boat reported that they quit fishing for crab entirely because of low prices and moved on fishing for pink shrimp as shrimp currently has relatively healthy markets. Respondents also noted that they are concerned about the upcoming Albacore Tuna fishing season and are worried about prices and demand for the product. Dungeness crab, bay clams, and albacore tuna are three most valuable

fisheries for Tillamook County, while Dungeness crab, pacific whiting, and pink shrimp are the most valuable fisheries for Clatsop County.

Two fishing businesses that are also engaged in processing activities have increased production but had already had plans to do so. They reported that the pandemic had increased demand in their direct to consumer sales channels and sped up their timeline for increasing production. Similar to farmers, they have increased production through procuring product from other local/regional fishermen.

Estimated Supply

Due to the increased demand for local food due to COVID-19, we wanted to understand what supply was remaining, or unsold that would be available for the remainder of the season. Presumably, this product would be available to sell via farmers markets, restaurants (when re-opened), and grocery stores. Further, with the establishment of online marketplaces in Tillamook and Clatsop County gaining traction, one of the concerns was the local producers' ability to consistently supply aggregation and online delivery models.

When asked, "What is your estimated supply for the remainder of the season? How are you planning for next season?" 7 of 8 fishing/seafood business interviewees indicated that they have access to or can harvest more fish to meet higher demands. Every single farmer and rancher that was interviewed indicated that their supply is limited, or that they are waiting on their next slaughter date to have more inventory.

	Supply Available	Very limited/No Supply
Fishers/Seafood	7	1
Farmers and Ranchers	0	6

One farmer noted that they do not have enough product to even go to market and are waiting until they slaughter their next few animals to attend. Every farmer that was interviewed commented that they have not been able to even think about next season, they are just "trying to get through this season". A produce farmer noted that it is very difficult to estimate the extent of their available supply because the markets keep fluctuating. Typically, produce farmers plan their crops based on assumptions about markets, historical sales and crop data, and new opportunities. They try not to grow something if it has not already been sold.

One fishing business explained that for their supply of groundfish (mostly rockfish) that they were fishing and selling their entire bi-monthly quota in just the first three weeks, due to new relationships with microprocessors/buyers. When thinking about next season, at least two fishing businesses indicated they are looking to increase the supply and variety of seafood they can supply by purchasing new permits. Costs to purchase these permits has been identified as a barrier. In addition, one fishing and direct marketing business indicated that they plan to continue expanding the number of boats they purchase from and hope to add one "full time boat" to their supply.

Discussions with fishermen revealed that for more vertically integrated businesses, supply was not much of an issue. They feel they have better control on sales and movement of products through various market channels and feel like they have opportunities to purchase from other fishermen when needed. Fishing businesses

selling products through their own retail and direct sales settings indicated that demand is starting to return, due to the implementation of “Phase 2” COVID-19 protocols, which ease restrictions and support more commerce. Conversely, with the market for Tillamook Bay Clams in both restaurant and bait sales have reduced significantly.

Shelf Stable Products

Due to the seasonality of farming, ranching, and fishing, a common strategy for ensuring cash-flow throughout the year is to develop a value-added product that can be sold through the winter. Shelf-stable valued-add products are an important opportunity for visitors to purchase a local product from the North Coast to take home with them, or to ship to a loved one.

Interviewees were asked about types of shelf stable products currently being produced or planned for future production. 3 of 8 fishing/seafood businesses replied that they are currently selling canned and/or pouched shelf stable tuna products. Two farms that were interviewed have an on-farm commercial kitchen and noted that they were trying to scale up their value-added products this season (jams, jellies, sauces).

	Yes, Producing or Planning To	Not Producing or Planning To
Fishers/Seafood	3	5
Farmers and Ranchers	2	4

The livestock producers that were interviewed are not currently selling, nor exploring the development of a value-added product, presumably because they do not have access to drying, aging, or curing services locally or through their processor. Other farmers commented that they assumed most commercial kitchen rentals were not operating due to COVID-19, and thus did not explore it, or were concerned about sanitation and exposure. Two farmers noted that they do not usually have the time to develop shelf-stable products with their busy farm schedules.

One seafood business said that they used to be able to have their products custom canned at the Port of Garibaldi. However, this option has not been viable for the past two years as there has not been enough organization and cooperation to make it work. Tuna pouches and cans are being processed by Oregon Seafoods and Chuck’s Seafoods, both in Charleston, Oregon. One business is currently offering a smoked (refrigerated) sablefish product, while another hopes to start creating smoked fish, oyster, and clam products in the next year. Two fishing businesses not currently engaging directly in value-add product development indicated that they are interested in starting a frozen fish fillet or canned product line in the future. However, resources (time, staff, money) are barriers to doing this in the near-term.

Technology Use and Solutions

A key goal of this project was to understand coastal producers’ interest in exploring and utilizing technologies that would enable more efficient sales through the local supply chain. Both project partners Food Roots and

North Coast Food Web are utilizing Local Food Marketplace’s online aggregation platform that allows for easy direct to consumer and institutional sales.

When asked about exploring or interest in technology solutions that would enable more efficient sales, 3 of 8 fishing/seafood businesses confirmed they are actively searching for websites or other technology solutions to further grow their business, market more effectively, and/or to streamline operational needs. Of these, two businesses are currently selling through FarmTable, one of which is also interested in also working with Small Farm Market Day. Two other businesses stated they are/may be interested in working with FarmTable or Small Farm market day in the future, but they are not currently in the market of selling processed/filleted products. Godaddy and Shopify were identified as two website building platforms being used. Outside of website shopping carts, Squarespace was the only point of sale system mentioned for supporting sales transactions. Amongst the farmer community, there seemed to be a general aversion to setting up their own online marketplaces and preferred to work with a local organization that has capacity to keep up the technology. One farmer noted that they tried setting up their own online storefront and found it frustrating, so they took it down.

	Looking for Solutions	Not Looking for Solutions
Fishers/Seafood	3	5
Farmers and Ranchers	1	5

Discussions further revealed that, for livestock, selling individual cuts of meat is not allowed unless they do USDA processing, so they only accept deposits online for quarter, half, or whole animals. Another farmer indicated that managing inventory via all of their market channels was challenging, and they didn't have the energy to keep updating their website with availability since it fluctuates frequently.

One produce farmer noted that they were seeking technology solutions that would enable them to have greater control over their supply chain. Specifically, they hoped to have integrated a customizable CSA option that allows an individual customer to choose what types of vegetables they want in their CSA share, as well as pause the share while on vacation, etc. One farmer noted that “it’s hard to write a crop plan on a bunch of maybes”, indicating that this technology would give the farmer more predictability and control over their market.

One seafood business stated they would like to incorporate more technology on the back end of their online marketplace system to support analytical, inventory, accounting systems, etc. It was also discovered that for fishing businesses selling off their boats, they do not have a great need for an advanced online marketplace solution, as they are not shipping, delivering, or aggregating. However, they are in need of good marketing channels and there is interest in exploring whether existing non-profit marketplaces and marketing platforms can support these types of sales.

Infrastructure Needs

In order for a local food system to flourish, there needs to be access to critical infrastructure that enables the supply chain. From farm/sea to table, there are often many players involved in taking a raw commodity and turning it into a salable product. Food infrastructure such as processing, cold/freezer storage and distribution

networks are important components that all farmers, ranchers, and fishermen need to build a thriving business.

Interviews ended with asking producers, “What type of infrastructure would support you in developing more value-added products, and/or support you to increase production for either this, or next season?” All of the producers confirmed that further infrastructure was needed to support them in growing their businesses.

	Needed	Not Needed
Fishers/Seafood	8	0
Farmers and Ranchers	6	

All three livestock producers that were interviewed noted that they would like to see a USDA meat processing facility on the North Coast. One farmer noted that they would like to see a farmer-owned, cooperative, mobile processing unit, similar to [North Cascade Meats](#) in Bellingham, Washington. Another farmer indicated that shared freezer/cold storage for meat that is centrally located would support the growth of their business. Without access to affordable, reliable USDA processing, livestock producers are limited in their ability to meet the local demand for meat in their community.

A produce farmer noted that shared cold storage and transportation would be key investments to support their growth. They commented that from their farm to Tillamook is a route they can really only take 1x a week and would like to see a farmer-cooperative distribution network built to move product in/around the coast.

Seafood producers provided a multitude of insights that demonstrated both needs for public infrastructure, as well as private business needs. Public or shared seafood infrastructure needs were identified as:

- Forklift supported with keycard lock system (4 interviews mentioned this)
- Spare fish/ice totes (3 interviewees mentioned this). It was also noted that keeping shared totes clean could be a big issue and it was unknown what regulations may need to guide this. It was suggested that instead of shared totes, maybe interested parties can look at acquiring totes through doing a bulk purchase, to help reduce prices. The purchase could be sponsored by the port or another stakeholder.
- Public loading ramp
- Weigh scale to support weighing fish, etc., when offloading boats
- Access to a micro-processing facility to support co-packing/processing operations, while two business are currently building private processing facilities. Of which, one mentioned the intention of supporting at least some of the local fleets co-processing needs. For the three businesses who demonstrated a need for access to this type of facility, it was mentioned that it could be a public or privately owned operation. Seafood processing center needs were stated by fisheries businesses in both the Astoria and Garibaldi areas. Elements of a processing facility mentioned that interviewees thought important included a vacuum packer/sealer, a fillet station, smoker, and cold storage/freezer.
- Ice machine to support the fleet. In Garibaldi, it was mentioned that they are not yet sure if they will have enough ice available to cover needs during a busy fishing season when tuna and salmon are coming in at the same time. They were also concerned that a currently operating machine might break down and create a supply issue.
- Running water at the end of “Commercial Street” at the Port of Garibaldi to support cleanup of equipment when offloading, weighing, and moving fish.

Other Infrastructure Related Mentions:

- Professional HACCP planner support. Three businesses stated that they could use help from a professional HACCP planner to create/write/discuss new plans or improve efficiencies with current plans. Sentiments also indicated that planners are quite expensive, and they would appreciate support with covering some costs.
- More distribution options to support coordinated and cooperative movement of product around the region.
- Dredging at the Port of Nehalem and the Port of Garibaldi were identified as needs.
- Development/revitalization of major port infrastructure was also noted as a major continued need.
 - At the Port of Garibaldi, repair of dock pilings and repair of the retaining seawall were mentioned. Grant writing support for the port of Garibaldi to address these matters was specifically asked for.
 - Revitalization of the east mooring basin at the Port of Astoria is in need of major reports. Boats can no longer dock in the basin. The transient tuna and herring/sardine fleet does not have a place to tie up any longer.

Additional Findings

- Conversations revealed that three businesses are selling frozen fish fillets/portioned products. Frozen products were reported to being processed by the businesses themselves or with Oregon Fish Co. in Hillsborough, Or. One business that has recently begun piloting a line of frozen fish fillets mentioned that costs to create the products are offsetting any revenues. To make this venture truly viable, they would need to reduce costs and increase efficiencies by a) better meat recovery on processed products b) lower processing costs, c) lower sales commission at the retail store. Having a local option for filleting/packing/freezing locally would be helpful in reducing transportation costs and saving time. Professional support to help businesses to get certified to ship/sell products internationally
- It was suggested that having a local entity provide “alerts” for grants that can support private businesses development and growth, including brick and mortar development, would be a wonderful service and resource.
- The continued marketing of North Coast/Garibaldi caught seafood was described as an important initiative to continue with.
- One farmer noted they are intentionally choosing a very direct to consumer business model for their livestock due to the amount of fuel being burned in the current meat supply chain. This farmer anticipates that there will be a tax on carbon emissions in the coming years and are actively building a local customer base that minimizes their travel. This same farmer was very interested in exploring the development of a USDA, cooperatively run mobile slaughter facility.

Recommendations

Recommendations for Marketing Platforms and Technology Solutions

From the interviews conducted, it is clear that businesses are not looking to create their own marketplace platforms, at least not in the short term (1 -2 years). Businesses who may look to use an online platform, stated that they would prefer to try to use existing platforms. It is not recommended, at this time, to develop any further online marketplaces by OCVA or partner organizations for coastal North Coast communities.

Rather, OCVA and partners who have or are developing online marketplaces should develop an outreach strategy to inform producers of their existence and desire to use those platforms to help sell their products. Both North Coast Food Web and Food Roots online marketplaces are being designed to support existing programs such as Small Farm Market Day and Farm Table. While utilizing these marketplace platforms to support existing programs, we also recommend keeping an open mind and open ear to how else these platforms can serve local food producers. For example, due to regulations and limited resources, some fishermen sell products off of their boat and are having great success doing so but are unable to create a product suitable for sales through the marketplaces. These fishermen do not currently have a strong marketing channel to reach consumers. This could be an opportunity to create a space or landing page on those marketplace platforms to connect interested consumers to the unique experience of purchasing seafood on the dock.

As well, we recommend promoting and making connections for consumers and producers to the regional for-profit marketplaces such as Source Fresh and Nehalem River Ranch. These platforms provide alternative means for producers to sell their products through and directly support local entrepreneurs.

Recommendations for Development and Acquisition of Infrastructure

The Niche Meat Processors Assistance Network, a national community of practice helping small meat processors, has a cost calculator and business plan that can be downloaded [here](#). Based on their financial modeling, the equipment cost for a USDA mobile slaughter unit is roughly \$280,000. A more thorough assessment of the meat supply chain is encouraged before pursuing this route. Initial findings demonstrate there is a need, yet more research is needed to know the extent.

In July 2020, the Oregon Department of Agriculture passed a bill that created a State Meat Inspection Program. This program seems to work with existing ODA meat processors to gain USDA/FSIS certification. Details regarding this program are forthcoming, and non-profit organizations and producers should reach out to their ODA processors on the coast and connect them with ODA regarding this opportunity.

For fisheries and seafood, we recommended continuing to pursue resources for shared infrastructure and development of co-processing facilities to support a more direct flow of product from fishermen into local and regional markets. For small fishing businesses, the cost of purchasing equipment or infrastructure to support the activities associated with off-loading, storing, and distributing products can be a big constraint. Often, to get around this constraint, fishermen will borrow equipment from other businesses at the Port, which can prove to be inefficient for the fishermen and burdensome for the other businesses. In some cases, borrowing equipment is an impractical solution due to logistics and/or local competition on the docks.

In Garibaldi specifically, to help create efficiencies and reduce constraints related to the movement of product at the dock, we recommend working the Port of Garibaldi, fishing businesses, and local nonprofits to develop opportunities for shared public access to a forklift, loading ramp, weight scale, and possibly 5 - 10 insulated totes for fish and ice. If the sharing of fish totes proves to be too burdensome an endeavor, we recommend organizing a shared purchase of totes by a group of fishermen and seafood businesses sponsored by the Port of Garibaldi or another organization. Due to the high cost of totes, bulk orders should be explored to provide price discounts and reduce costs. To help manage the use of these resources, equipment could be stored under a keycard entry system or padlock system. If a building is needed to store the equipment, a 20' or 40' cargo container can store most items at an affordable price, though a proper location for the container will

need to be identified. Other considerations should be for insurance coverage for the owner of the equipment, and creating the necessary rules, regulations, and training regarding the use of equipment. If financially and logistically feasible, it is also recommended that running water be made available near the public fisherman's hoist at the eastern end of commercial street to support the cleaning of totes and equipment used during offloading processes.

The need for a co-packer/co-processor or a publicly available processing space was a common theme in conversations for interviews with fishing businesses working in both Tillamook and Clatsop county. Currently there are activities in Astoria, Wheeler, and Garibaldi to build private smaller processing facilities or assess the opportunity for doing so. At the dock in Garibaldi, there are a number of existing buyers with facilities that do a limited amount of processing for other businesses, have done so in the past, or have demonstrated an interest in doing so in the future. We recommend before moving forward with planning for development of a public and shared facility, OCVA and food system partners have concerted conversation with local buyers about any desire to incorporate co-processing and co-packing options into their business plans. If one or two businesses successfully provide processing services for others, that may meet the needs for custom processing. If a new public and shared processing facility were to be considered there are a number of conversations and plans that will need to be created to support such a facility. A short list of plans to consider for development in support of a public processing space include a feasibility study (costs associated with necessary building purchases and renovations to meet regulatory standards for processing, costs associated with purchasing and maintenance of equipment, insurance costs, rent/lease rates, etc.), infrastructure and partnership/management agreements (identifying who owns the equipment and infrastructure, who is responsible for overall management of the space and care of the facilities, responsibilities of parties to maintain and fix equipment, etc.), use and fee structures (identifying how equitable access will be provided to stakeholders, costs for users, and mandatory training, certifications, licenses, insurance coverage, etc. users would need to carry), and facility HACCP plans.

Private infrastructure and resource needs were demonstrated by nearly all businesses interviewed. Needs ranged from equipment to support new sterilization methods at processing facilities to new fishing permits or quota, to tanks and totes for holding products. We recommend OCVA and partners continue providing current programs, such as Food Roots' Individual Development Account program and North Coast Food Web's small grant program, while also considering the development of other opportunities to bolster local producers, such as a medium or large size grant program. Some producers mentioned that they would appreciate support identifying grant opportunities that their for-profit businesses can access. We recommend that partners begin to collate a list of grant opportunities and create a plan for long-term and sustained sharing across networks through social, newsletters, etc. to alert producers when grant programs become available.

Recommendations for Providing Service Support

Lastly, professional service provider support was clearly shown as a desire for local food producers. With a highly skilled and well connected community of private businesses and non-profit organizations along the North Coast, we recommend that, in the short term (6 months - 1 year), OCVA and partners work together to fundraise and focus potential support services in three main areas:

1. HACCP support. Locate contractors and provide direct professional support for writing and/or refining plans.
2. Marketing support. Utilizing the strengths and connections of OCVA, Visit Tillamook Coast, and others, create collaborative marketing campaigns to draw attention to all private and nonprofit marketplaces and online shopping carts, farm stands, fresh "off the boat" seafood sales, etc. and continue with

overall regional food/seafood marketing to draw interest to the North Coast food sector.

3. Website/e-commerce support. We recommend providing food businesses and producers with professional training opportunities and/or direct 1:1 support to help with search optimization/analytics, website development/refinement (design and narrative), e-commerce platforms for further development or refinement of services, are a few needs that surfaced. One way this can be accomplished is through hiring a consultant firm and having them on retainer to deliver broader cohort sessions or, perhaps even more importantly, to provide direct support to businesses to help them meet their specific webpage/e-commerce needs.

Funding Resources:

- **USDA Programs**
 - [Rural Economic Development Loan and Grant](#)
 - [Community Facilities Grant and Loan Program](#)
 - [Rural Business Development Grant](#)
 - [Local Food Promotion Program](#)
 - [Value Added Producer Grants](#)
- [Healthy Food Financing Initiative](#)
- [Business Oregon - Community Development Block Grant](#) (Requires City and County Governments as the lead applicants)

Other Supporting and Complementary Resources:

- [Commercial Fisheries of Tillamook County - Economic Impact Report](#)
- [North Coast Oregon Food Hub Feasibility Assessment](#)
- Garibaldi Seafood Initiative Value Chain Assessment ([Executive Summary](#) | [Full Report](#))
- [Garibaldi Infrastructure Needs Assessment](#)
- [North Coast Food System Infrastructure and Cost Structures](#) (live document) - Running list of needs, costs, and resources
- [North Coast Webstore Producers, Processors & Online Shopping Carts](#)
- [Webstore Platforms](#) - Comparison Sheet

Appendices

- Appendix A: Interview questions

Appendix A: Interview Questions

Context (not to share necessarily verbatim with producers, but for framing // outreach to folks):

-Aiming to have each interview complete in 30 minutes.

- Explain partnership between ecotrust/ocva/food roots/ north coast food web

Stronger local food resiliency is a visitor industry investment, a community resilience investment, and it all aligns perfectly with our current projects and two-year plan. By creating systems where visitors can easily find local food products while traveling and even order them when they get back home, we can turn lifelong visitors into lifelong customers and therefore increase the value of each visit. We also expect that creating easier systems for local retail and restaurants to access local food will bring more local seafood into our businesses and enhance experiences for visitors and locals alike. Imagine this utopia where local producers and local businesses are easily working together to provide high-quality, unforgettable meals and memories.

Our organization is looking to collaborate, convene and/or contribute to:

1. Shortening food supply chains
2. Securing scalable aggregation options for the smallest of producers (both farmers and fishermen)
3. Installing better technology solutions for producers, purveyors, and consumers to communicate
4. Developing and refining more efficient fulfillment and distribution methods from producers direct or restaurants, marketplaces, coastal residents, and visitors

Producer Interview Questions:

1. How has COVID-19 impacted your business and/or your supply chain (where you sell, how you distribute, etc.)?
 - a. Reference producer list for insights and follow up questions (ex: "I see that you are sold out of CSA shares, or doing home delivery.")
 - b. How are you currently adapting your business model?
 - i. Listen for: technology, web sales, social media, aggregation schemes.
2. Are you increasing your production due to the spike in interest // need for local food?
 - a. If yes, ask: what crops and or products did you increase production of and to what extent?
 - b. If no, ask: what barriers did you, or are you experiencing as it relates to scaling up production to meet the demand?
3. What is your estimated supply for the remainder of the season? How are you planning for next season?
4. Are you currently producing, or planning to produce a shelf-stable and/or value-added product this season?
 - a. If no, ask: why? what barriers are you facing?
 - b. If yes, ask: where do you process, and how secure and/or stable is your processing given C-19?
 - i. Listen for: access to commercial kitchen space, regulations, time, risk, markets, etc.
5. Are you exploring, or interested in technology solutions that would enable more efficient sales (online sales via website)?
 - a. What do they like / not like about their existing platform?
 - b. What functionality or services would they like to see?
6. What type of infrastructure would support you in developing more value-added products, and/or support you to increase production for either this, or next season? (listen for: drop sites, cold storage, co-packing, market connections)

Processor Interview Questions:

1. How has COVID-19 impacted your business and/or your supply chain?
 - a. Reference processor list for insights and follow up questions (ex: "I see that you are doing home delivery.")
2. How are you currently adapting your business model?
 - a. Listen for: technology, web sales, social media, buying from more local growers
3. To what extent have you increased processing due and/or purchases from local producers due to spike in interest/ need for local food?

4. Do you feel that there is collectively adequate capacity to meet the need for (enter product) processing for this season?
5. Are you concerned about public or worker health due to C-19? And what food safety steps are you taking to minimize your risk?
6. Are you currently producing, or planning to produce shelf-stable products (jerky, canned fish)?
7. Are you exploring, or interested in technology solutions that would enable more efficient sales (online sales via website)?
 - a. What do they like / not like about their existing platform?
 - b. What functionality or services would they like to see?
8. What type of infrastructure would support you in developing more value-added products, and/or support you to increase production for either this, or next season? (*listen for: more connections with growers, specific equipment*)